

Exercise 1: Create and process purchase requisition

Create a purchase requisition for 5 pieces of 24-inch HDMI cables using the procurement category of Computers.

1. Go to **Procurement and sourcing**, then to **Purchase requisitions**, and then to **All purchase requisitions**.
2. Click **New**.
3. Name: Enter **New HDMI Cables**.
4. Click **OK**.
5. Reason: Select **General** (General supplies).
6. Details: Enter **New, longer HDMI cables**.

Add an item to the purchase requisition.

7. Click **Add products** in the **Purchase requisition lines** FastTab.
8. Select the **Computers** procurement category (a subcategory of Office Machines).
9. Click **Add unlisted product to lines**.
10. Product name: Enter **24in HDMI Cable**.
11. Unit: Enter **ea**.
12. Click **OK**.
13. Change to the Line details tab.
14. Product name: enter **24-inch HDMI cable**.
15. Quantity: Enter **5**.
16. Unit price: Enter **41.49**.
17. Vendor Account: Select **1001** (Acme Office Supplies).
18. Click **OK**.
19. Click **Save**.

Submit the purchase requisition created in the previous practice for approval, and perform the approval process.

1. Go to **Procurement and sourcing**, then to **Purchase requisitions**, and then to **All purchase requisitions**.
2. Open the draft purchase requisition created in the previous practice.
3. Click **Workflow** at the top, and then click **Submit**.
4. Comment: Enter **Request for longer HDMI cables**.
5. Click **Submit**.
6. Click **Workflow>Workflow history**
7. Click **Refresh** a few times and wait until the work items shows records.
8. Click **Reassign** button.
9. Select **Admin** in the **User** field.

10. Click **Reassign**.
11. Click **Refresh**.
12. Close the **Workflow history** page.

Approve the purchase requisition.

13. Click **Workflow** at the top, and then click **Approve**.
 14. Comment: Enter **Approved**.
 15. Click **Approve**.
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Exercise 2: Create and process request for quotation

Send out a request for quotation to additional suppliers US-111 (Contoso Office Supply) and US-103 (Rain Projectors) for 500 of A0001 (HDMI 6' Cables).

Create the request for quotation and send to the appropriate suppliers.

1. Go to **Procurement and sourcing**, then to **Requests for quotations**, and then to **All requests for quotations**.
2. Click **New**.
3. Purchase type: Select **Purchase order**.
4. Document title: Enter **HDMI Cables**.
5. Site: Select **1** (Home speakers production).
6. Warehouse: Select **13** (Site 1 – Finished Goods).
7. Click **OK**.

Add a line to the request for quotation.

8. If necessary, click **Add line** to add a line to the list.
9. Line type: Select **Item**.
10. Item number: Select **A0001** (HDMI 6' Cables).
11. Quantity: Enter **500**.
12. Click **Save**.
13. Send the request for quotation to the vendors.
14. Click **Options** at the top, click **Change view**, and then select **Header view**.
15. Open the **Vendor** FastTab.
16. If necessary, click **Add** to add a line to the list.
17. Vendor account: Select **US-111** (Contoso office supply).
18. Click **Add**.

19. Vendor account: Select **US-103** (Rain Projectors).
20. Click **Save**.
21. Click **Quotation** at the top, and then select **Send** under the **Process** section.
22. Make sure both vendors appear.
23. Click **OK**.

Reply to a Request for Quotation

Update the request for the quotation created in the previous practice with the vendor responses.

Process the quotation for US-103. Enter the vendors' replies to the request for quotation.

1. Go to the **Procurement and sourcing** module, then to **Requests for quotations**, and then to **All requests for quotations**.
2. Open the request for quotations created in the previous practice.
3. Click **Options** at the top, click **Change view**, and then select **Header view**.
4. Click the **Vendor** FastTab.
5. Click the **Request for quotation** number for **US-111** (Contoso office supply).
6. Quantity: Enter **500**.
7. Unit: Enter **ea**.
8. Unit price: Enter **10.00**.
9. Click **Save**.
10. Close the **Request for Quotation Reply** form.
11. Click the **Request for quotation** number for **US-103** (Rain Projectors).
12. Quantity: Enter **500**.
13. Unit: Enter **ea**.
14. Unit price: Enter **8.00**.
15. Click **Save**.
16. Close the **Request for Quotation Reply** form.

Accept a vendor's reply.

17. Click the **Request for quotation** number for **US-103** (Rain Projectors).
 18. Click **Reply** at the top, and then select **Accept** under the **Process** section.
 19. Click **OK**.
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Exercise 3: Create and purchase policies

Create a purchase requisition permission policy.

1. Go to **Procurement and sourcing**, then to **Setup**, then to **Policies**, and then to **Purchase requisition permissions**.
2. Select **Mike Danseglio** in the list of workers.
3. Change to the **Requester** FastTab.
4. Click **Add**.
5. Name: Select **Susan Burk**.
6. Click **Save**.

Create a Purchasing Policy

1. Go to the **Procurement and sourcing** module, then to **Setup**, then to **Policies**, and then to **Purchasing policies**.
2. Click **Procurement Policy USMF**.
3. Click the **Policy rules** FastTab.
4. Click **New**, then **Policy**.
5. Name: Enter **Office Supplies**.
6. Description: Enter **Office supplies policies**.
7. Policy rule type: Select **Category access policy rule**.
8. Click **Create policy rule** in the **Policy rules** section on the right.
9. Select **Office and Desk Accessories** in the **Available Categories** list.
10. Click the right arrow button.
11. Click **OK**.
12. Click **Save**.