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**DEVELOP AN RFP USING MAIL MERGE – (PUR-011)**  
SAINT LOUIS PUBLIC SCHOOLS

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**1. SCOPE:**

This procedure discusses the process used to DEVELOP AN RFP USING MAIL MERGE.

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

**2. RESPONSIBILITY:**

Contract and Compliance Analyst

**3. APPROVAL AUTHORITY:**

Executive Purchasing/Budget Director

**4. DEFINITIONS:**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

4.1. SLPS – Saint Louis Public Schools

**5. PROCEDURE:**

**5.1.** Click in the **Command Field**, type **ME51N** and then press the **Enter** key.

The **Create Purchase Requisition Screen** is displayed.

**5.2.** Find the appropriate **Desired Vendor** before the start of the create purchase requisition process.

**5.3.** In the  (document type) field, use **Framework requisn.** for a FO purchase requisition.

**Note:** The remaining items must be completed for each line in a requisition.

**5.4.** Enter the **Acct (Account) Assignment Cat.** (Category) in the **A** field. e.g. **1**

**5.5.** Enter the **Material Short Text** in the **Short Text** field.  
e.g. **ABC Service Contract**

**5.6.** Enter the **Quantity** in the **Quantity** field. e.g. **1**

**5.7.** Enter the **Unit** in the **Unit** field or use the  (unit drop down) to display the unit list. e.g. **EA**

**5.8.** Enter the **Delivery Date in the Delivery Date** field or use the  (delivery date calendar drop down) to display the monthly calendar. e.g. **10-14-2008**

**Note:** Choose one month from the date of requisition for delivery date.

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- 5.9. Enter the **Material Group** in the **Matl Group** field or use the  (Material Group drop down) to display the material group list. e.g. **100 Contracts-6319**
- 5.10. Enter **SLPS** in the **Plant** field.
- 5.11. Enter the **Storage Location** in the **Stor. Loc.** field or use the  (storage location drop down) to display the storage location list. e.g. **1005**
- 5.12. Enter the **Purchasing Group** in the **PGR** field or use the  (PGR drop down) to display the PGR list.  
**Note:** For a Framework Requisition choose **CC1**.
- 5.13. Enter the **Requisitioner** in the **Requisnr.** field.  
**Note:** Type the first initial and last name of the person submitting the requisition. e.g. John Smith would be **Jsmith** (maximum 12 digit field).
- 5.14. Enter the **Tracking Information** in the **Tracking** field.  
**Note:** Type the first initial and last name. e.g. **Jsmith** (maximum 10 digit field).
- 5.15. Enter the **Desired Vendor** in the **Des. Vendor** field.  
or use the  (desired vendor drop down) to display the desired vendor list. **Note:** Type the desired vendor for goods or services. e.g. **600008410**
- 5.16. Click on the  **Item** (Item) button to display the item details section (button located below line item section on the lower left hand side of the screen).
- 5.17. Click  (Account Assignment) tab.
- 5.18. Enter the **Unloading Point** in the **Unloading Point** field. **Note:** Type the point where the where the service will be used. e.g. **Administrative Office**
- 5.19. Enter the **Recipient** in the **Recipient** field.  
**Note:** Enter the recipient who will be receiving the goods/materials.  
e.g. **LBell** (maximum 12 digits).
- 5.20. Enter the **General Ledger Account** in the **G/L Account** field or click  (general ledger search help) button. e.g. **6319**
- 5.21. Enter the **Cost Center** in the **Cost Center** field or click  (cost center search help) button.

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e.g. **915-00-110**

**5.22.** Enter the **Fund** in the **Fund** field or click  (fund search help) button. e.g. **110-2572**

**5.23.** Click  (Valuation) tab.

**5.24.** Enter the **Valuation Price** in the **Valuation Price** field. e.g. **10,000**

**5.25.** Click  (Texts) tab.

**5.26.** Enter the description of the contract in the item text field.

e.g. This is a contract with (enter vendor name) to provide (describe service(s)) between (insert date or date range of service(s)) at a cost not to exceed (insert amount).

If contract is over \$5,000, enter the board resolution number. **i.e 07-06-08-18**

**Note:** Use ME52N to enter board resolution number following the board approval.

**5.27.** Click on the  (check) button.

**Note:** Correct any errors if applicable and then check the requisition again. Repeat until all errors have been cleared.

**5.28.** Click on the  (save) button.

**Note:** Write down the Requisition number.

**6. RECORD RETENTION TABLE:**

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
SAP Issued Purchase Order	Computer		Discard as desired	Password protected

**7. REVISION HISTORY:**

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<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
12/01/08	A	Initial Release