

## QUICK REFERENCE GUIDE

### *Price Schedule on Strategic Sourcing Events*

*December 17, 2013; Revised 10/15/2015*

## Using a Price Schedule

Specifying a price schedule on an event line is a simple and convenient way to allow for complex pricing or to allow bidders/responders to breakdown a price, or budget. The benefit of this feature is that no specific price for the line has to be entered as part of the event response; an attachment of the pricing sheet or budget can be added in its place.

Before deciding to use a price schedule, decide if it's appropriate for your event. Keep the following in mind when making this decision:

- Indicating a price schedule for the event will require the event creator to add an attachment to the line of the event, however, it does not require a line level attachment in the response. You can require the attachment by adding a required line-level attachment-type bid factor.
- Price schedule is not an option if you are pulling the line into the event from a requisition. The quantity, price, and UOM will default from the requisition, and the price schedule checkbox will not be available. Also remember, an event should not contain some lines copied from a requisition, and some created manually, it must be all one or the other.

If using the price schedule is not an option on a particular event, the same overall result can be accomplished using alternate methods like a line group, or just specifying in the line to see the attached price schedule or breakdown. Using these two methods will still require the bidder to specify a price for the line or group in their response.

## Selecting a Price Schedule

1. **Navigate** to Sourcing, Create Events, Event Details
2. Click the **Add a New Value** Tab
3. Enter your event details
  - a. Business Unit
  - b. Origin
  - c. Event Format
  - d. Event
4. Click **Add**
5. Enter *Event Summary* details
6. Click *Line Items*
  - a. Enter *Description*

**Note:** You may want to include a reference to a price schedule (cost proposal) in the description.
  - b. Enter *Category*

**Note:** **Do not** enter any value in the UOM, Qty, or Start Price fields. Any value entered in any of these fields will disable the price schedule checkbox. Even if a value is entered and then deleted, the price schedule checkbox will still not be available. The line must be deleted and created a second time if you wish to use this option.
7. Select the Advanced Definition tab

**Create an Event**

**Line Items**

Business Unit: H5501 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From:  Go Filtered View: All Lines and Groups

Line Items Customize | End | View All | First | 1 of 1 | Last

Basic Definition **Advanced Definition**

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
1		Camera	45120000					0.00000

Event Total: 0.0000 USD Line Weighting Total: 0 % Remaining Weight: 100 %

Add Selected Lines to Group:  OK

[Return to Event Overview](#) GoTo:  Go

Save Event Changes Refresh Add Update/Display

8. Click the *Price Schedule* check box

**Create an Event**

**Line Items**

Business Unit: H5501 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From:  Go Filtered View: All Lines and Groups

Line Items Customize | End | View All | First | 1 of 1 | Last

Basic Definition **Advanced Definition**

Line	Item ID	Description	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints	Price Schedule
1		Camera	SHARE	.	<a href="#">Details</a>	<a href="#">Bid Factors</a>	No	<input type="checkbox"/>

Event Total: 0.0000 USD Line Weighting Total: 0 % Remaining Weight: 100 %

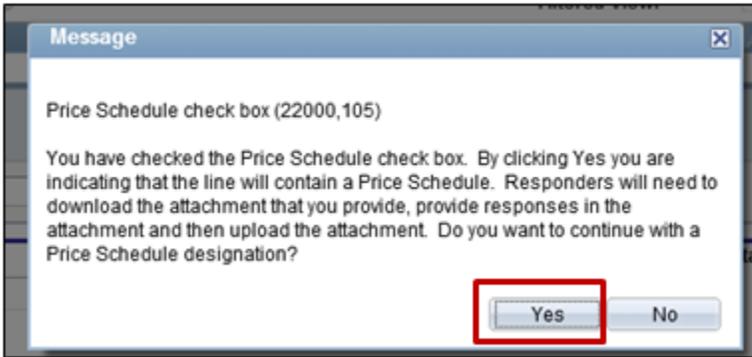
Add Selected Lines to Group:  OK

[Return to Event Overview](#) GoTo:  Go

Save Event Changes Refresh Add Update/Display

9. A message will appear asking if you wish to continue

10. Click **Yes** to continue



**Note:** Once the Price Schedule check box has been selected and confirmed, it cannot be undone. If you decide a price schedule is no longer the best option, the line must be deleted. A new line can be added as appropriate.

When a price schedule is used, an attachment must also be included for that particular line.

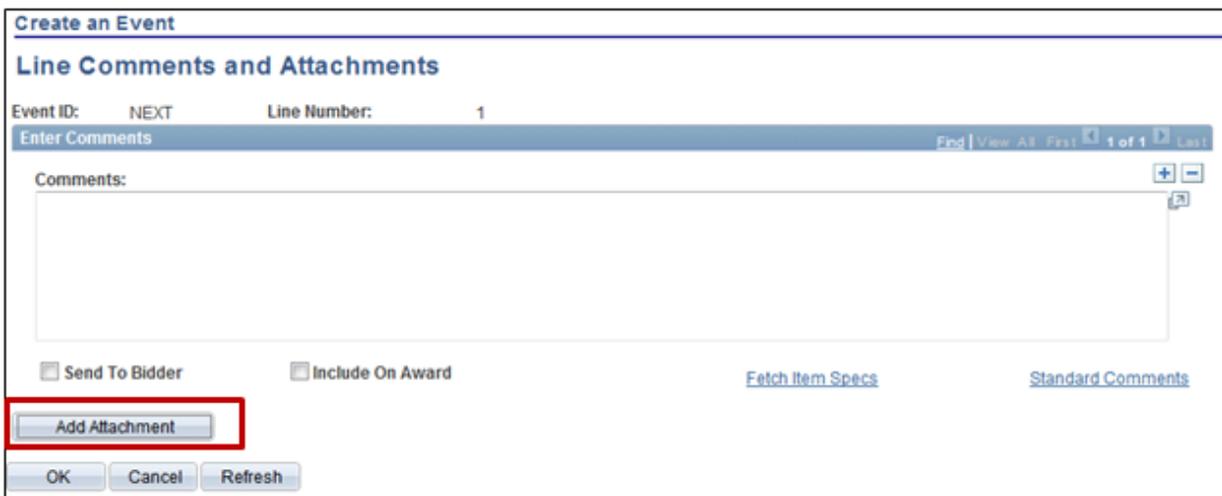
11. Click the Line Comments and Attachments icon  to add the price schedule



12. Enter any line level comments in the *Comments* field

**Note:** It is a good idea to mention a price schedule is attached, and also give instructions as to how the responder should use it correctly.

13. Click **Add Attachment** button to add your price schedule documents to the event.



Enter a description to the description field.

**Note:** A description is a required field when adding an attachment to the event

Confirm your comments and attachments are viewable by bidders.

14. Click **OK**

**Create an Event**

**Line Comments and Attachments**

Event ID: NEXT Line Number: 1

Enter Comments Find | View All First 1 of 1 Last

Comments: + -

See attached price schedule

Send To Bidder  Include On Award [Fetch Item Specs](#) [Standard Comments](#)

Add Attachment

Attachments Customize | Find First 1 of 1 Last

Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications	
Price_Schedule.docx	Price Breakdown	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	View -

OK Cancel Refresh

When you return to the Basic Definition tab, notice that the quantity is listed as “1” and price is listed as “\$.01”. The UOM has also defaulted to “EA”. These values cannot be changed; the vendor will see the requested quantity, but not the start price on the Supplier Portal Line Details page for the event..

**Create an Event**

**Line Items**

Business Unit: H5501 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: [ ] Go Filtered View: All Lines and Groups

Line Items Customize | Find | View All First 1 of 1 Last

Basic Definition Advanced Definition

Line	Item ID	Description	Category	UOM	Qty	Start Price	Ext. Amount	Weighting
1		Camera	45120000	EA	1.0000	0.0100	\$0.01	0.00000

Event Total: 0.0100 USD Line Weighting Total: 0 % Remaining Weight: 100 %

Add Selected Lines to Group: [ ] OK