

## Informal Quotes

Informal Quotes enable Department Access users in ProcureAZ to conduct and/or document informal solicitations for price quotes for off-contract goods and services while completing a Requisition. Informal Quotes are conducted by creating the Item(s) that price quotes will be solicited for, indicating the relevant dates, and identifying vendors to notify.

Informal Quotes can then be published on the web to enable electronic response by registered vendors. If solicited outside of ProcureAZ, price quotes received via phone, fax or email can be documented.

### Creating an Informal Quote

Before you can create a new document, you must login to ProcureAZ using your Login ID and Password.

In order to create Requisitions, you must be in the Department Access (DA) or Basic Purchasing (BP) role, and you must have the ability to create off-contract requisitions.

Informal Quotes can be accessed via Requisitions for off-contract goods and services. Therefore, you must create an Open Market or Direct Open Market Requisition in order to conduct an Informal Quote.

### Creating by Cloning

One method for creating an Open Market or Direct Open Market Requisition is to clone an older Requisition.

To search for a Requisition to clone, use the **Advanced Search**  feature in the Header Bar along the top of the screen. Select "Requisitions" from the **Document Type** dropdown to display the Requisition search fields. Enter the information you know about the Requisition you would like to clone into the search fields and select **Find It**. The matching Requisitions will appear.

Advanced Search ▾					
Results					
Req #	PO #	Description	Requisition Type	Requisition Date	
<a href="#">RQ11AGENCY00021</a>		cordless phone with answering machine	Open Market	05/08/2011	
<a href="#">RQ11AGENCY00843</a>		Symantec backup Renewal	Open Market	08/17/2011	
<a href="#">RQ11AGENCY02008</a>	<a href="#">PO-11-AGENCY-01640</a>	E-Mail /Attachments Encryption	Open Market	11/02/2011	
<a href="#">RQ11AGENCY02240</a>		VDI Project	Open Market	11/16/2011	
<a href="#">RQ12AGENCY04391</a>	<a href="#">PO-12-AGENCY-03047</a>	McAfee Anti Virus Licenses	Open Market	03/16/2012	

Once the Requisition search results have returned, select the link in the Requisition # column to view the Requisition you wish to clone. The **Summary** tab of the Requisition will initially be displayed. On the bottom of this tab, select the **Clone Requisition** button to create a new copy of the document.

## Informal Quotes

Approval Path:

Delete	Approver	Order Sequence	Approval Path ID	Level	Approver Type	Date Requested	Date Approved/Disapproved/Canceled	Approved/Disapproved by
There are no approval paths found for this requisition.								

You will be asked to select the **Fiscal Year** for the new document.

NIGP Code Browse | My Account | Customer Service | About Current Organization: State Procurement Office

Home | Items | Documents | Vendors Quick Buy Find It

Please select the fiscal year for the new document from the dropdown below.

2014

Save & Continue Cancel & Exit

### Creating from Scratch

Another method for creating an Open Market or Direct Open Market Requisition is to start a new Requisition from scratch. Hover your mouse over the **Documents** → **Requisitions** → **New**.

NIGP Code Browse | My Account | Customer Service | About Current Organization: State Procurement Office May 29, 2014 4:39:50 PM MST

Home | Items | Documents | Vendors Quick Buy Find It

Home - Welcome

News(1) Dash Receipts Invoice Quotes

My Reminders(0) Events(0)

Category Title

Notices TEST & TRAIN will be down on May 29th

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### Setup – General and Items Tab

The Informal Quote feature is accessed on the Vendors tab of your Requisition while it is in “In Progress” status. Before you can proceed there however, you must to complete the **General** and **Items** tabs. You may also wish to attach additional documentation to your solicitation, which can be done from the **Attachments** tab.

As only Open Market and Direct Open Market Requisitions allow the use of the Informal Quote feature, ensure you have selected one of those options from the **Requisition Type** field on the **General** tab. This will restrict you to adding only off-contract Items to the Requisition on the **Items** tab.

## Informal Quotes

Open Market Requisition RQ12AGENCY04887 Status: 1RI

**General** | Items | Vendors | Address | Accounting | Routing | Attachments | Notes | Reminders | Summary

Requisition Number: **RQ12AGENCY04887** Short Description\*: cordless phone with answering machine  
 Status: 1RI - In Progress Fiscal Year: 2012  
 Department\*: PURCH - Purchasing Department Organization: Managed Shared Organization  
 Location\*: PRCH - Purchasing  
 Required By Date:  Entered Date: 08/24/2012  
 Requisition Type: Open Market Type Code:   
 Requestor: Direct Open Market Purchaser: Anthony Daniels  
 Contact: Open Market Contact Phone: 555 555 5555 -   
 Alternate ID: RPA Tax Rate:   
 Estimated Cost: Release  
 Print Format\*: Default Req Print Format  
 Work Order Number:   
 Date Last Updated: 08/24/2012 10:11:59 AM User Last Updated: Administrator System

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Use **Add Open Market Item** to add the desired items, descriptions, and units of measure from the Items tab.

Open Market Requisition RQ12AGENCY04887 Status: 1RI - In Progress

**General** | **Items** | Vendors | Address | Accounting | Routing | Attachments | Notes | Reminders | Summary

Sort by Column: Print Sequence  Sort Descending

Item #	Print Sequence	Item Description								Total Cost	Delete <input type="checkbox"/>
		Quantity	Unit Cost	Net Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Freight		
1	1.0	Vtech LS6425-3 cordless phones with answering machine to be picked up @ Carle Place, Please email invoice.								\$79.99	<input type="checkbox"/>
		1.0	\$79.99	\$79.99	SET - Set	\$0.00		\$0.00	\$0.00	\$79.99	<input type="checkbox"/>
Total										\$79.99	

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### Setup – Vendors Tab

To solicit price quotes for your Requisition items via ProcureAZ, select **Publish Informal Bid On Web**, provide a **Bid Ending Date** and click **Save & Continue** on the **Vendors** tab. Vendors will immediately be able to see your solicitation and submit price quotes in response through ProcureAZ.

## Informal Quotes

Open Market Requisition RQ12AGENCY04887 Status: 1RI - In Progress

General Items **Vendors** Address Accounting Routing Attachments Notes Reminders Summary

**Vendor Validation Warnings**

- No recommended vendor.
- Item # 1: No vendor, and there is no recommended vendor at header level.

Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Vendor Remit-to Address	Recommended	Informal Quote
<input type="text"/>						

Publish Informal Bid On Web

Show Unit Prices to Vendors

Allow Vendor to Change Quantity

Allow Vendor to Change UOM

Select bidder participation

Unrestricted informal bid, all vendors can view and respond

Restricted informal bid, only selected vendors can view and respond

**Informal Bid Date Section**

Bid Ending Date: (MM/DD/YYYY HH:MM:SS AM or PM)

Bid Available Date: (MM/DD/YYYY HH:MM:SS AM or PM)

Purge Date: (MM/DD/YYYY)

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If you prefer to delay the publishing of your solicitation, input a **Bid Available Date**, that determines the date and time that vendors are able to begin viewing and responding to your solicitation.

Note that you are also able to attach documents to your solicitation and limit your solicitation to select vendors. If you wish to attach additional documentation to your price quote solicitation, you must add those attachments via the **Attachments** tab prior to publishing. If you wish to limit your solicitation to specific vendors, you must select those vendors and ensure Restricted informal bid is selected prior to publishing.

Here is an explanation of all the fields on the Vendors tab:

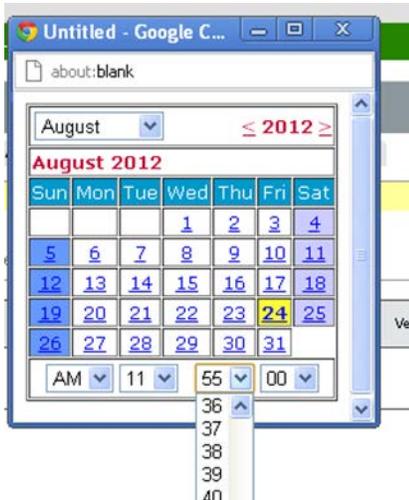
Field	Description
Publish Informal Bid on Web	When checked, allows vendors to view and submit price quotes for the Items on your Requisition via ProcureAZ. If this option is not checked, you must solicit price quotes outside of ProcureAZ. Once selected, "Bid Ending Date" field becomes required in order to publish the solicitation.
Show Unit Prices to Vendors	When checked, displays to vendors the unit price estimates entered for each Item on the Requisition. This option is unchecked by default so that vendors are not given an idea of how much you are expecting to spend per Item.
Allow Vendor to Change Quantity	When checked, allows vendors to edit the desired quantity you provided for each Item. This option is useful if vendors may provide the Item(s) in pre-packaged quantities (e.g. package of 3 vs. package of 8).
Allow Vendor to Change UOM	When checked, allows vendors to edit the desired unit of measure you provided for each Item. This option is useful if vendors may provide the Item(s) in different units (e.g. boxes vs. each).

## Informal Quotes

Unrestricted	When selected, all registered vendors can view and respond to the solicitation within ProcureAZ
Restricted	When selected, only the vendors you select on the Vendors tab can view and respond to the solicitation within ProcureAZ. If neither "Restricted" nor "Unrestricted" is selected, all registered vendors will be able to view and respond to the solicitation within ProcureAZ.
Bid Ending Date	If soliciting price quotes via ProcureAZ, the date and time you expect all vendor price quotes to be submitted. This will be communicated to vendors, but does not affect when you are able to end the solicitation, view submitted price quotes or recommend vendors for award.
Bid Available Date	If soliciting price quotes via ProcureAZ, then this is the date and time that the notification about the solicitation will be sent to selected vendors and when vendors will be able to view and respond to the solicitation within ProcureAZ.
<del>Purge Date</del>	<del>NOT USED</del>

Two of the fields on the Vendors tab of Requisitions require that you input a date and time. Dates can be entered in one of two ways.

1. The first is by clicking the calendar icon next to the field. This will display a pop-up window featuring a calendar with dropdown fields to select a time. Once you select a date in the calendar, the pop-up window will close and the date selected will appear in the field. Therefore, if a specific time is desired, you must select the time before clicking on the date.



2. The second method for entering a date and time is simply to type it into the field. In order for the system to acknowledge what you have entered however, it must match the format included in parentheses next to the name of the field - (MM/DD/YYYY HH:MM:SS AM or PM).

Note that when selecting the Bid Ending Date, the system cuts off vendors' ability to submit a response at the exact time selected. Therefore, in order to allow vendors to submit their response until 3:00:59 pm, you must enter a time of 3:01pm.

## Informal Quotes

### Adding Bidders

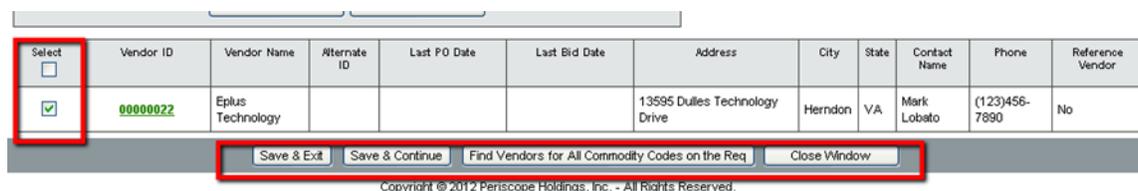
If you would like to notify specific vendors about the solicitation opportunity in ProcureAZ, or you are ready to solicit price quotes offline, you must add the vendors that you intend to notify. To do so, select the **Lookup & Add Vendors** button along the bottom of the Vendors tab to display the Lookup & Add Reference Vendors pop-up window. From here, you can search for a specific vendor by name or ID, or you can search for all vendors that are registered with specific commodity codes.

The easiest approach is to use the **Find Vendors for All Commodity Codes on the Req** button along the bottom of the screen. Selecting this button will return a list of all vendors registered with the commodity codes associated with your Requisition Items.



To add a vendor, you will first need to click the check box in the **Select** column next to the vendor. If necessary, you can conduct as many vendor searches as needed by returning to the top of the screen, changing your search criteria and clicking **Find It** again.

If you decide to select a vendor or vendors from the current screen, once you've selected the vendor(s), along the bottom of the screen you'll want to select one of the "Save" buttons. **Save & Exit** adds the selected vendor(s) from the current screen to your Informal Quote and returns you to the Vendors tab of your Requisition. **Save & Continue** adds the selected vendor(s) from the current screen and keeps you on the same screen so you can conduct additional searches. If more than 25 results matched your search criteria, you'll also see the button **Save & Next Page**, which adds the selected vendor(s) from the current screen and then takes you to the next page of search results. To return to the Vendors tab, you can also select the **Close Window** button along the bottom of the screen.



Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date	Address	City	State	Contact Name	Phone	Reference Vendor
<input checked="" type="checkbox"/>	00000022	Epius Technology				13595 Dulles Technology Drive	Herdon	VA	Mark Lobato	(123)456-7890	No

Below the table, four buttons are highlighted with a red box: 'Save & Exit', 'Save & Continue', 'Find Vendors for All Commodity Codes on the Req', and 'Close Window'. At the bottom, there is a copyright notice: 'Copyright © 2012 Periscope Holdings, Inc. - All Rights Reserved.'

Once you've selected a vendor or vendors from which you'll be soliciting price quotes and returned to the Vendors tab, the chosen vendors will appear listed above the Informal Quote configuration options. At this stage, from the Vendors tab you can:

- Add additional vendors from which to solicit price quotes;
- Notify the chosen vendors of the solicitation opportunity in ProcureAZ, and/or;
- Document price quotes for the chosen vendors if received outside of ProcureAZ.

## Informal Quotes

As price quotes are received from vendors via ProcureAZ, or documented by you, you can also view, edit and recommend them for award from the Vendors tab.

Open Market Requisition RQ12AGENCY04887 Status: 1RI - In Progress

General Items **Vendors** Address Accounting Routing Attachments Notes Reminders Summary

**Vendor Validation Warnings**

- No recommended vendor.
- Item # 1: No vendor, and there is no recommended vendor at header level.

Delete All	Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Vendor Remit-to Address	Recommended	Informal Quote
<input type="checkbox"/>	<input type="text"/>						
<input type="checkbox"/>	90000022		Eplus Technology	Email	General Mailing Address - Mark Lobato 13595 Dulles Technology Driv... Mark Lobato 13595 Dulles Technology Drive Herndon, VA 20171-3413 US Email: test@periscopeholdings.com Phone: (123)456-7890 Id: 334	<input type="checkbox"/>	Create

Publish Informal Bid On Web  
 Show Unit Prices to Vendors  
 Allow Vendor to Change Quantity  
 Allow Vendor to Change UOM  
 Select bidder participation  
 Unrestricted informal bid, all vendors can view and respond  
 Restricted informal bid, only selected vendors can view and respond

**Informal Bid Date Section**

Bid Ending Date: (MM/DD/YYYY HH:MM:SS AM or PM)   
 Bid Available Date: (MM/DD/YYYY HH:MM:SS AM or PM)   
 Purge Date: (MM/DD/YYYY)

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Upon returning to the Vendors tab after adding the vendors you will be soliciting price quotes from, if you've selected the **Publish Informal Bid On Web** check box, a **Notify Vendors** button will appear along the bottom of the screen.

**Vendor Notification Result**

Subject: Informal Quote Request - Req # RQ12AGENCY04887, cordless phone with answering machine

**Email Recipients**

Delivery Date: 08/24/2012 10:19:40 AM

Vendor ID	Vendor Name	Email Address
90000022	Eplus Technology	Mark Lobato (test@periscopeholdings.com)

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Upon selecting the Notify Vendors button, the Vendor Notification screen will appear listing the vendors that were notified. Clicking the **OK** button will return you to the Vendors tab.

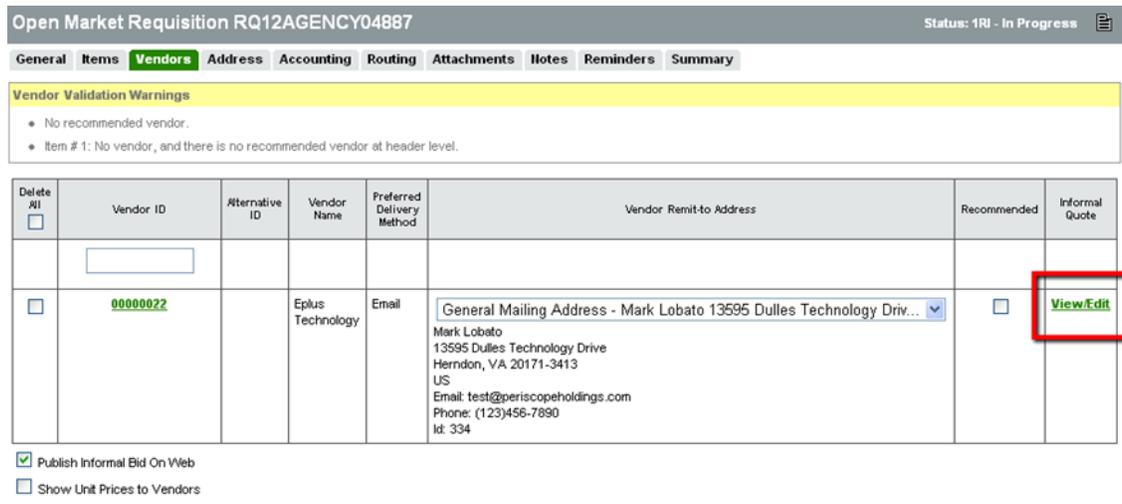
## Informal Quotes

**NOTE:** you can continue to add and notify new vendors to solicit price quotes from up until the day of the Bid Ending Date, even after notifying an initial set of vendors. Clicking the **Notify Vendors** button for a second time will only notify any newly added vendors. Vendors already notified will not be notified again.

Upon notifying vendors, both you and the vendors will receive an email. The email sent to you will list the vendors that were notified. The email sent to vendors gives them instructions for responding to the Informal Quote request.

### Informal Quotes – Review and Recommendation

Once a price quote is entered for a vendor, either by the vendor if solicited via ProcureAZ, or by you if solicited offline, the Informal Quote column will display a **View/Edit** link next to that vendor. Selecting this link enables you to view and edit the price quote, as well as apply the pricing received in the quote to all of your Requisition Items.



Open Market Requisition RQ12AGENCY04887 Status: 1RI - In Progress

General Items **Vendors** Address Accounting Routing Attachments Notes Reminders Summary

**Vendor Validation Warnings**

- No recommended vendor.
- Item # 1: No vendor, and there is no recommended vendor at header level.

Delete #/1	Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Vendor Remit-to Address	Recommended	Informal Quote
<input type="checkbox"/>	<input type="text"/>					<input type="checkbox"/>	<a href="#">View/Edit</a>
<input type="checkbox"/>	00000022		Eplus Technology	Email	General Mailing Address - Mark Lobato 13595 Dulles Technology Drive... Mark Lobato 13595 Dulles Technology Drive Herndon, VA 20171-3413 US Email: test@periscopeholdings.com Phone: (123)456-7890 Id: 334	<input type="checkbox"/>	<a href="#">View/Edit</a>

Publish Informal Bid On Web  
 Show Unit Prices to Vendors

Once a price quote is entered, you will also see a new button along the bottom of the Vendors tab labeled **Informal Quote Tabulation**, which enables you to compare all entered price quotes and apply pricing to each Requisition Item.



**Informal Bid Date Section**

Bid Ending Date: (MMDD/YYYY HH:MM:SS AM or PM) 08/29/2012 11:01:00 AM

Bid Available Date: (MMDD/YYYY HH:MM:SS AM or PM)

Purge Date: (MMDD/YYYY)

Save & Continue    Lookup & Add Vendors    Notify Vendors    **Informal Quote Tabulation**

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Selecting the **View/Edit** link next to a vendor in the Informal Quote column will display the quote that has been entered for that vendor. From this screen, you can edit the quote if you've received notice of a change from the vendor, and you can apply the pricing received from the vendor to all of the Items on your Requisition by selecting **Apply Pricing to Req Items** along the bottom of the screen. Applying a single price

## Informal Quotes

quote's pricing to your Requisition Items will also signify your intention to recommend this vendor for all the Items on your Requisition. You will see a pop-up message explaining this upon selecting Apply Pricing to Req Items.

If you would like to compare submitted price quotes side-by-side and/or recommend different vendors for different Items on your Requisition, return to the Vendors tab by clicking **Close Window** on the Informal Quote screen.

Selecting the **Informal Quote Tabulation** button along the bottom of the Vendors tab will allow you to view submitted price quotes side-by-side and recommend different vendors pricing for different Items.

Along the top of the screen, options exist allowing you to configure how many price quotes will appear on the screen and how to sort the quotes. Clicking **Go** will put your changes into effect.

**Informal Quote - Requisition**

**Header Information**

<b>Requisition Number</b>	RQ12AGENCY04887	<b>Description</b>	cordless phone with answering machine
<b>Buyer</b>	Administrator System Phone: (555)555-5555 support@buyspeed.com		
<b>Ship To</b>	Purchasing Department 115 East Bethpage Road Plainview, NY 11803	<b>Bill To</b>	Jessica Klauber AHRC Nassau 189 Wheatley Rd Brookville, NY 11545

**Item Information**

Sort by Column: Print Sequence  Sort Descending Go  

Req Item Info	Quantity	Unit Cost	UOM	Tax Rate	Freight	Extended Amount	Quote Total	No Bid
Item #: 1 Print Sequence: 1.0 ( 839 - 84 ) Vtech LS8425-3 cordless phones with answering machine Quantity(UOM) : 1.00(SET)	1.0	69.99	SET - Set		0.00	\$69.99	\$69.99	<input type="checkbox"/>
						\$69.99	\$69.99	

! Please save your changes before sorting or applying informal quote pricing to requisition items. Otherwise, your changes will be lost.

Save & Exit Save & Continue Apply Pricing to Req Items Close Window

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Below this section, each of your Requisition items is listed, and each vendor for which price quotes were entered will appear along the top row. Each vendor's price quote is listed next below their name, allowing you to compare each vendor's quote for each Item side-by-side. The lowest price quote for each Item will be highlighted green and have two asterisks next to it.

Once you are done receiving price quotes and are ready to recommend vendors, you can either recommend a single vendor for all Items, or a different vendor for each Item.

1. To recommend a single vendor from this screen, select the **Apply Pricing** button within that vendor's column. That will select the check box next to each Item's price quote for that vendor.

## Informal Quotes

- To recommend different vendors for different Items, click the check box next a price quote in each Item's row. Then, select the **Apply Selected Pricing to Req Items** button along the bottom of the screen. Upon clicking either "apply" button, you'll be displayed a pop-up window informing you that the vendor's pricing will be applied to the Items.

Informal Quote Tabulation - Requisition RQ12AGENCY04887

# of Items per page: 25 Sort by: Print Sequence Ascending

# of Vendors per page: 5 Sort by: Vendor Name Ascending

Total Item Count: 1 Informal Quote Bidder Count: 2

Req Item Info	0000066 - A&K EQUIPMENT C...	0000022 - Ecluz Technolog...
Item #: 1 Print Sequence: 1.0 ( 839 - 84 ) Vtech LS6425-3 cordless phones with answering machine Quantity(UOM): 1.00(SET) Unit Cost: \$79.99	<input type="checkbox"/> \$72.95 1.0 ( SET ) 0.0 (Tax) 0.0 (Freight) Subtotal: \$72.95	<input type="checkbox"/> **\$69.99 1.0 ( SET ) 0.0 (Tax) 0.0 (Freight) Subtotal: \$69.99
Quote Total	\$72.95	\$69.99
Apply All Quote Item Pricing to Req Items	<input type="button" value="Apply Pricing"/>	<input type="button" value="Apply Pricing"/>

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**NOTE:** if you are creating a Direct Open Market Requisition which will not route through procurement, you must apply pricing from vendor's quotes to every Requisition Item before you can complete the Requisition.

### Completing the Requisition

Once you are done recommending vendors to your Requisition Items, you must complete the remaining requisition tabs (Accounting, Attachments, Addresses, etc.) just as for other requisitions before submitting the document for approval on the Summary tab.

- Review your Ship-to and Bill-to Addresses at the Address tab;
- Review or add funding sources at the Accounting tab;
- Attach any supporting documents at the Attachments tab;
- Add Notes or Reminders (optional);
- Review your Requisition at the Summary Tab;
- Submit for Approval.

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Once you submit your Requisition for approval, it moves to a status of Ready for Approval, and you will not be able to use the Informal Quote feature again for this Requisition unless it is disapproved and you re-open it to put it back In Progress.