

## Creating and Releasing a Spot Bid

*This document is a quick-reference guide for procurement users and requesters who need to need to create and release spot bids (also known as sourcing from a requisition) in the Arizona Procurement Portal (APP.) If you have any questions or need assistance, please reach out to your change agent. If you have any questions, please contact the APP Help Desk at [app@azdoa.gov](mailto:app@azdoa.gov). Additional resources are also available on the SPO Website: <https://spo.az.gov/>*

The Sourcing from a Requisition (or Spot Bid) process refers to an instance when a requisitioner can create a simplified sourcing project for an on-contract or off-contract requisition. As part of this simplified sourcing project, which may be known as 3 Bids and a Buy at some agencies, no questionnaires or evaluations will be completed and a minimum of 3 offers will need to be received in order for an award to be created.

In order to be able to perform a spot bid on a requisition, a requisitioner needs to have sourcing rights and have a delegated authority over \$10,000. If a requisitioner creates a requisition above their delegated amount, it will need to go to their Procurement Officer for sourcing to be performed. If the Procurement Officer for the agency does not have the delegated amount, they will send the requisition to a SPO Admin for sourcing. In any case where a requisition has exceeded a user's delegated amount, they are able to click the Forward button the requisition to send the requisition to

### Creating a Spot Bid Sourcing Project

1. From any page in APP, select **Browse Requisitions** from the **Procurement** drop-down menu.
2. From the Browse Requisitions page, search for the approved requisition that would you like to flip into a spot bid. Click the  (**Pencil**) icon to open for the requisition.
3. Confirm that the requisition has received the necessary approvals and that you have sourcing rights for this requisition by reviewing the information on the **Workflow** tab.
4. If you have adequate sourcing rights, click the **Create Sourcing** event button, otherwise contact your Procurement Officer or a SPO Admin to complete sourcing.
5. Enter a description for the sourcing project in the **Label** field.
6. Select a **Sourcing Project Type** and **RFx Type** of *Spot Bid*.
7. Click **Go to Sourcing Project**.

## Identifying Suppliers for a Spot Bid

Before a spot bid is released, the user responsible for the spot bid should identify at least three suppliers who they would like to invite to bid on a solicitation. When browsing for suppliers, the user responsible for the spot bid will be able to search by keywords, commodities, organization, and M/WBE status.

1. While reviewing the spot bid sourcing project, navigate to the **Identify Suppliers** tab.
2. Click the  (**Ellipsis**) icon to search for and select suppliers.
3. Enter your search criteria (e.g., Keywords, Commodity, Veteran Owned Business, etc.) and then click the **Search** button.
4. Click the checkbox(es) for any suppliers you wish to add and then click the **Close** button.
5. Identify the **Main Contact** for each identified supplier.
6. Click the **Save** button.

## Preparing and Releasing a Spot Bid

In order to prepare a solicitation, the user responsible for the spot bid will need to specify the Bid Due Date and confirm the line items that they would like suppliers to bid on the item grid.

After the Bid Due Date has been entered and the line items on the item grid have been confirmed, the user responsible for the spot bid can release the sourcing project for offers. Unlike a typical sourcing project, no approval workflow is required.

1. While reviewing the spot bid sourcing project, navigate to the **Prepare RFX** tab.
2. Select a **Bid Due Date**.
3. Click on the **Item** header.
4. Enter descriptions of the item(s) you are trying to source in the **Label (V)** field. Confirm that the rest of the item grid information is correct. Please note that field that has **(V)** is a field that is visible to suppliers.
5. Click the **Send Solicitation for Approval** button. Please note that the spot bid will be automatically approved after you click this button.
6. Click the **Send** button. Confirm the files you want to attach, the supplier contacts you wish to contact, and the corresponding message you wish to send. Click **Send and close**.