

Ohio | Buys

Connecting Buyers and Suppliers

Managing Quick Quotes in Ohio|Buys

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Prepared for agency users responsible for creating, updating, submitting, and reviewing quick quotes in Ohio|Buys.

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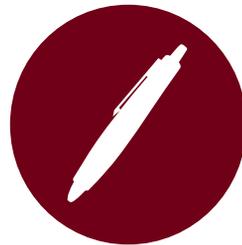
Overview: A quick quote (i.e., three bids and a buy) is a standardized, simplified solicitation process that encourages additional competition and replaces the State's existing quoting practices. A quick quote needs to be completed in Ohio|Buys whenever a line item in a purchase requisition references a State Term Schedule (STS) contract or contains over \$2,500 in non-catalog items for a Supplier.

This learner guide covers the activities related to creating a quick quote in Ohio|Buys, identifying and inviting Bidders and/or Suppliers, reviewing and comparing quotes, making awards, and updating associated purchase requisitions.

Users: Both Requisitioners and Requesters who have been given the Quick Quote Procurement User role may create and manage quick quotes.

Process Overview:

- 1) Create the Quick Quote Solicitation:** From a purchase Requisition, you can click Create Quick Quote to start the Quick Quote Process.
- 2) Set Up the Quick Quote Solicitation:** You can add information including the start and end dates, selection process, and summary of the need to provide additional details to potential Suppliers and Bidders. You may also provide more detail about the items contained in the solicitation, including adding any relevant attachments.



In This Document (cont.):

Process Overview:

- 3) Identify and Invite Bidders / Suppliers:**
You must select Suppliers who can provide the commodity requested in the quick quote solicitation. Searching for Bidders and Suppliers to invite can be filtered on qualifications such as Equal Employment Opportunity qualification.
- 4) Release the Quick Quote Solicitation:**
You must release the quick quote solicitation by sending the invite to the selected Bidders and/or Suppliers. Doing so will automatically post the solicitation on the Ohio|Buys Public Portal where additional Bidders / Suppliers can see and respond to the request.
- 5) Analyze and Award:** At the close of the bidding period, Ohio|Buys provides a simple and straightforward view for you to compare quotes from Bidders / Suppliers side-by-side and select the one that best meets your needs.
- 6) Update the Purchase Requisition:** Once an award has been made, the original purchase requisition needs to be updated with the award details. After the original purchase requisition has been updated, it can be submitted for approval.



CREATING AND RELEASING QUICK QUOTE SOLICITATIONS

Topics

- Creating a Quick Quote Solicitation
- Locating an Existing Quick Quote Solicitation
- Identifying Bidders / Suppliers for a Quick Quote Solicitation
- Releasing a Quick Quote Solicitation
- Canceling a Quick Quote Solicitation

CREATING A QUICK QUOTE SOLICITATION

Overview:

- What's Covered: This section covers the process of creating a quick quote solicitation from a purchase requisition
- Used When: Reference this when a quick quote is required for a purchase requisition.

Step-by-Step Instructions for Creating a Quick Quote Solicitation

1 Log in to Ohio|Buys and open the purchase requisition for which you would like to create a quick quote solicitation. The purchase requisition must be in *Draft* or *Initialized* status. Click **Create Quick Quote**.

Requisition : REQ0000005944 - Custom table cloths (Draft)

Save | Submit requisition | << Back to Catalog | Reset Allocations | **Create Quick Quote**

⚠ - Requisition lines have one or more NON-blocking alerts

Header

Requisition ID: 5944

Status: Draft

Ship to

P002099 DAS ASD FIN 30 E BROAD FL
40 DAS Office of Finance Columbus

2 The associated line items from the purchase requisition will be automatically carried over to a new quick quote solicitation. You can edit these details prior to releasing the quick quote solicitation for responses. From this page:

- Enter the **Sourcing Project Label**, which should be a short description of what the quick quote solicitation is for. Note that this will also be the title that Bidders / Suppliers see.
- Confirm and make any necessary updates to the **Commodities** and/or **Organizations** fields. These fields are pre-populated based on your purchase requisition.
- Enter the **Open Date**. This informs when responses will be opened and reviewed.
- Click **Go to Sourcing Project**.

Go To Sourcing Project

Add to an existing Sourcing Project

Sourcing Project

Create a New Sourcing Project

A Sourcing Project Label *
Custom table cloths

Sourcing Type *
Quick Quote

RFX Type
Quick Quote

B Commodities
14111706 - Paper table cloth

Organizations *
DAS101000 - Administrative Support Di...

C Open Date ID
5944

Add / Select Suppliers to the Sourcing Project

Suppliers

Step-by-Step Instructions for Creating a Quick Quote Solicitation

The quick quote solicitation has been created. From the **Prepare RFX** tab:

- Enter an **End** date and time, which is the date and time responses are due from Bidders and/or Suppliers.
- It is highly recommended to update the **Process** and **Summary** fields. These fields provide additional details regarding the basis for award (Process) and the purpose of the solicitation (Summary) and are visible to the public.
 - The Process field should be used to explain things like what the award will be based on (e.g., lowest responsive and responsible, best value, etc.) or other procedures that apply to the solicitation.
 - The Summary field should detail what the solicitation is for, who contact for questions, and where the associated goods will need to be shipped to.
- Click **Save**.
- Navigate to the **Setup Project** tab.

▲ Note: When the quick quote is publicly posted, the Process field is shown as part of the Summary field. It is not shown as its own field to Bidders / Suppliers.

3

Sourcing project: BPM000777 - Custom table cloths - Prepare RFX

Save & Close Save Send Other Actions

Selected Lot - Round *
Lot 1 - Round 1 : Custom table cloths (Draft)

Setup Item Suppliers Documents Workflow

RFX Settings

Status: Draft Save as a template

RFX Type: Quick Quote

Solicitation Name *: Custom table cloths

Lot # ①: 1 Round # ①: 1

Commodity Suppliers

Notified? Yes No

> Advanced Options

Open and Closure

Begin: 2/19/2020 3:04:10 PM

End *: 2/19/2020 12:00:00 AM Close automatically

Enable for Public Posting

Publication begin date: 2/19/2020 3:04:10 PM

Publication end date: 2/19/2020 12:00:00 AM

Process

Summary

Step-by-Step Instructions for Creating a Quick Quote Solicitation

From the **Setup Project** tab:

- Confirm the displayed information and make updates as needed.
- Click **Save**.

Sourcing project: BPM000777 - Custom table cloths - Setup Project

Save & Close Save

General Information

Code
BPM000777 Save as a template

Label *
Custom table cloths

Project Type * Status
Quick Quote In progress

Main Orga * Other Organizations
DAS101000 - Administrative Support Divis

Main Commodity * Other Commodities
8751 - Paper table cloth

Opening Date *
2/19/2020

4

On the **Setup Team** tab, you are able to add team members to your quick quote. This is particularly helpful if you would like someone to be able to take action on your quick quote while you are out of the office.

- Search for your team members using the **Select Team** field. Assign a Profile of **Contributor (Sourcing Project)** if not defaulted.
- Click **Save**.
 - ▲ Note that only the user listed as **Responsible** for the project is able to release and reward the quick quote.
 - ▲ Only an Agency Admin can delete a team member from a project.

Sourcing project: BPM000777 - Custom table cloths - Setup Team

Save & Close Save

Team

Select Team * ⓘ

Email	Profile	Contact
DASRequisitioner8@mailinator.com	Responsible (Sourcing Project)	DASREQUISITIONER8 Training

5

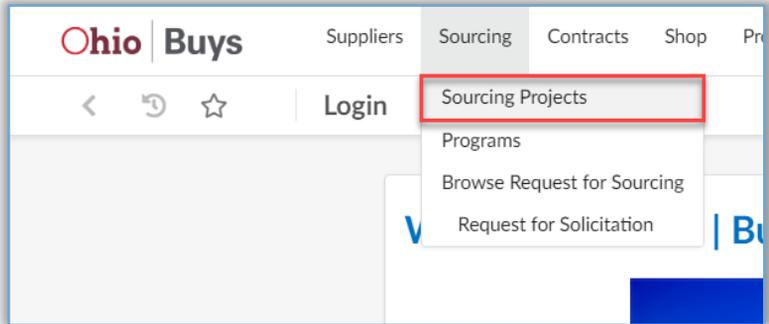
LOCATING AN EXISTING QUICK QUOTE SOLICITATION

Overview:

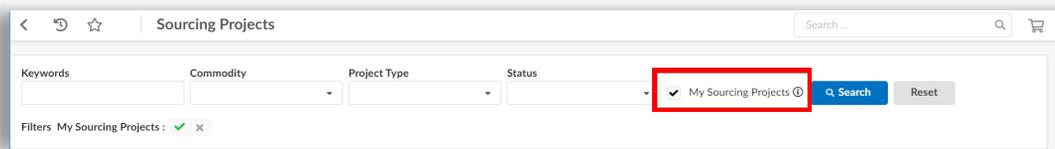
- What's Covered: This section covers the process of locating an existing in-progress, or completed quick quote solicitation in Ohio|Buys
- Used When: Reference this when navigating to an existing quick quote solicitation

Step-by-Step Instructions for Locating a Quick Quote Solicitation

From the homepage in Ohio|Buys, navigate to the **Sourcing** tab and select **Sourcing Projects** from the drop-down menu.



You can search for a quick quote by Keywords, Commodity, Project Team, and Status. If you want to limit your search to only show quick quotes on which you are a team member, click the **My Sourcing Projects** checkbox and then click **Search**.



Click the **Pencil** () icon next to a quick quote to open it.

Label	Code	Type	Commodity	Opening Date	Sourcing Step Shortcuts
  5x ACL Software Licenses	BPM000780	Quick Quote	• Human resources software	3/26/2020	    

INVITING BIDDERS / SUPPLIERS TO A QUICK QUOTE SOLICITATION

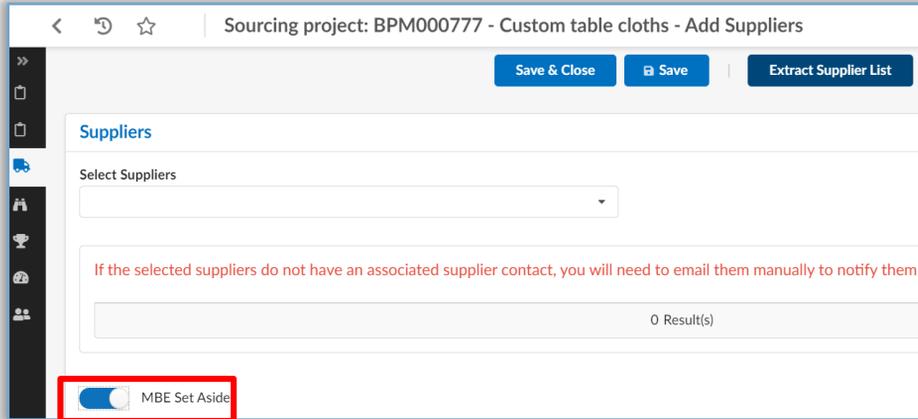
Overview:

- What's Covered: This section covers the process of inviting potential Bidders and/or Suppliers to a quick quote solicitation
- Used When: Reference this when inviting Bidders and/or Suppliers to a quick quote solicitation.

Step-by-Step Instructions for Inviting Bidders/Suppliers to a Quick Quote Solicitation

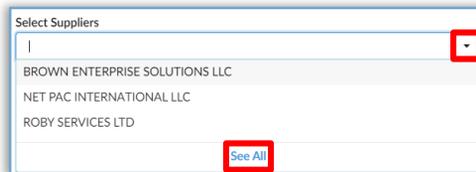
Open your quick quote solicitation and navigate to the **Add Suppliers** tab.

- ▲ If you wish to only invite Bidders and/or Suppliers who hold a valid MBE status, slide the **MBE Set-Aside** indicator on this tab.

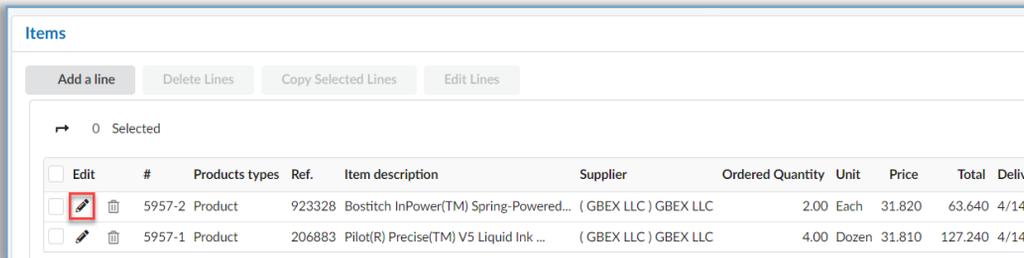


1

Click the **Selector** (▼) icon on the **Select Suppliers** field. By default this drop-down will display all of the Bidders and Suppliers who have set their account up with the relevant commodity code(s) in Ohio|Buys. To add additional Bidders and/or Suppliers, click **See All**.



- a) If ordering an item off an STS Contract, it may be helpful to review which Dealers are listed on the contract. To view the contract information on an item, navigate to the line item within the original purchase requisition and click the **Pencil** (✎) icon to open it.

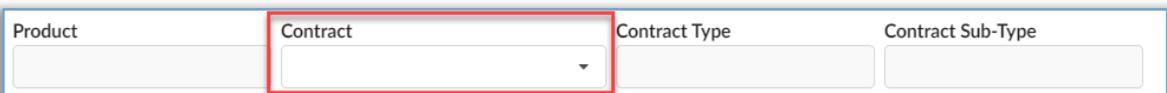


2

- b) Navigate to the **More Item Information** section of the item and click on the header to expand it.

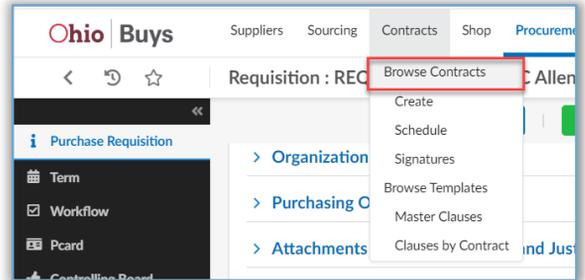
[> More Item Information](#)

- c) Click in the **Contract** field to reveal any contract numbers associated with the line item.

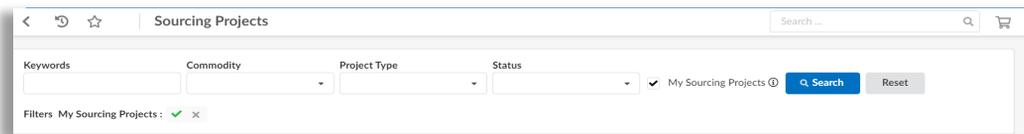


Step-by-Step Instructions for Inviting Bidders/Suppliers to a Quick Quote Solicitation

- d) Navigate to the **Contracts** header in the Main Menu Navigation Bar and select **Browse Contracts** from the drop-down menu.

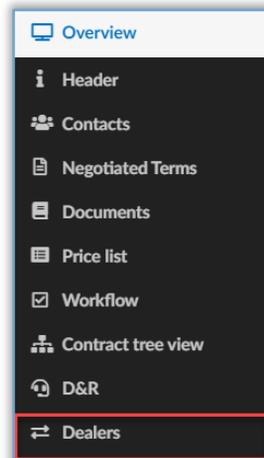


- e) Type the contract number into the **Keywords Search** field and then click **Search**.



- f) Click the **Pencil** (✎) icon next to the contract to open it.

- g) Navigate to the **Dealers** tab. Any dealers associated with the contract will be displayed and should be invited to the quick quote.



- ▲ If you do not find the Bidders and/or Suppliers that you were expecting when searching by commodity, you can also visit the EOD website at <https://eodreporting.oit.ohio.gov//mbe-certification> and search for MBE Suppliers by commodity. If a Supplier is identified, then clear the commodity filter and search by Supplier name in the Keywords field.

Step-by-Step Instructions for Inviting Bidders/Suppliers to a Quick Quote Solicitation

After clicking **See All**, a list of potential Bidders and/or Suppliers is displayed. By default this list will be filtered to only show Bidders and/or Suppliers who offer the commodity for your solicitation. You can refine this search by **Keywords**, **Commodities**, and/or **Dealers**.

▲ By default Ohio|Buys will filter the Bidders / Suppliers you see by the commodity code associated with the line item. To see additional Bidders and/or Suppliers, or Bidders / Suppliers who have not set their accounts up with that commodity code in Ohio|Buys, you will need to clear the commodity filter. To do this, click the **X** icon next to the commodity name in either the Commodities field, or the filter. Then click **Search**.

3 Click the **Checkbox** () icon to select a particular Bidder or Supplier or click the **Checkbox** () icon next to the **Code** header to select all of the displayed Bidders and/or Suppliers.

4 Click the **X** icon in the top right of the window once you have finished selecting Bidders and/or Suppliers.

5 Click **Save**.



Step-by-Step Instructions for Inviting Bidders/Suppliers to a Quick Quote Solicitation

Review the list of identified Bidders and/or Suppliers. If you would like to remove a Bidder or Supplier, click the **Trash Can (🗑)** icon next to their name and then click **Save**.

Sourcing project: BPM000777 - Custom table cloths - Add Suppliers

Save & Close Save Extract Supplier List

Suppliers

Select Suppliers

If the selected suppliers do not have an associated supplier contact, you will need to email them manually to notify them they have been invited to participate in the event.

Supplier	Status	Main Contact	Selection Reason	Invited	Comment	Tax ID Number	EOD Status
🗑 BROWN ENTERPRISE SOLUTIONS LLC	Active Supplier	BROWN GEORGE (38647@00001805411.com)	Known and used	✓		900353698	• Edge • MBE
🗑 NET PAC INTERNATIONAL LLC	Active Supplier	ORDER CONTACT Supplier (netpac@test.com)	Known and used	✓		770710916	• Edge • MBE
🗑 ROBY SERVICES LTD	Active Supplier	SLEDGE MICHELLE	Known and used	✓		311705782	• Edge • MBE

3 Result(s) ⚙

MBE Set Aside

6

▲ In addition to selecting specific Bidders and/or Suppliers, you can also invite all Bidders and/or Suppliers who state they offer the commodity the quick quote solicitation is for. This process is covered later in this Learner Guide as part of releasing the quick quote solicitation.

▲ If you would like to invite a Bidder or Supplier who is not set up in Ohio|Buys, or a Bidder / Supplier who does not have a registered Supplier contact, you may do so. However, please note that you will need to contact them outside of Ohio|Buys to inform them of the solicitation, and will need to enter their bid for them on their behalf. This process is covered in more detail later in this Learner Guide.

RELEASING A QUICK QUOTE SOLICITATION

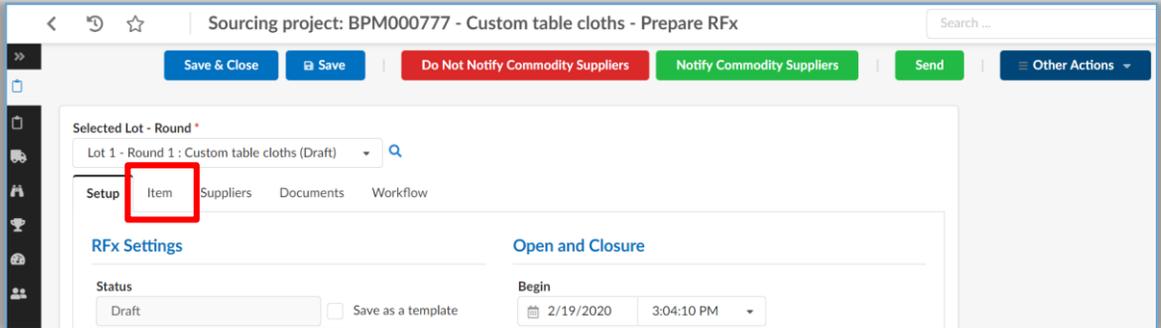
Overview:

- What's Covered: This section covers the process of releasing a quick quote solicitation to Bidders and/or Suppliers
- Used When: Reference this when opening a quick quote solicitation for responses by Bidders and/or Suppliers

Step-by-Step Instructions for Releasing a Quick Quote Solicitation

Open your quick quote solicitation, navigate to the **Prepare RFX** tab, click on the **Item** header.

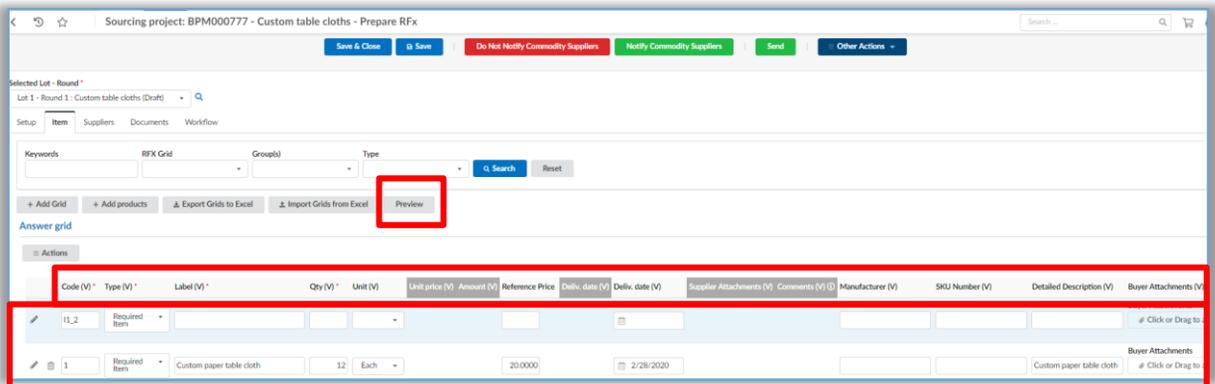
1



The line items associated with your solicitation are displayed.

2

- ▲ Any fields with a **(V)** in the title are fields that are visible to a Bidder and/or Supplier when submitting a response.
- ▲ The information displayed in the grid is populated from your purchase requisition. Review the displayed information. Ensure that you complete the **Label, Unit, Delivery Date, Manufacturer, SKU Number, and Detailed Description** sections. (*This is not applicable when obtaining a quick quote for a freeform item.*)
- ▲ You can click the **Preview** button to visualize what an invited Bidder and/or Supplier would see when submitting a response.
- ▲ There will always be one blank line item displayed in the grid, this is where additional line items can be added to a quick quote solicitation if needed (e.g., and alternate item added by a Bidder or Supplier).
- ▲ To add attachments associated with an item, click the **Buyer Attachments** button and select the file that you want to upload.



Step-by-Step Instructions for Releasing a Quick Quote Solicitation

3

Once you have finished making changes, click **Save**. When you are ready to release your quick quote solicitation for responses, click **Send**.



4

To finish releasing the quick quote solicitation, complete the following steps on the displayed pop-up window:

- Select the files you would like to attach to the *invitation to bid* email.
- Confirm the Bidder and/or Supplier list.
 - ▲ If a Supplier does not have a Supplier Contact in Ohio|Buys, you will need to deselect that Supplier by unchecking the checkbox to its left. You will need to contact the Supplier outside of Ohio|Buys.
- Revise the email **Subject** and **Text** as necessary. Be sure to check off **Send me a copy** as this will make it easier to copy and paste the message text for any emails to Bidders and/or Suppliers sent outside of Ohio|Buys.
- Click **Send** and then click **OK** to notify the selected Bidders and/or Suppliers and open the quick quote solicitation for responses. Note that once a quick quote is opened, it is also posted on the Ohio|Buys Public Portal.
 - ▲ This means the solicitation is visible to **all** Suppliers regardless of whether or not they were invited to participate.

Company Name	Sending modes	User
<input checked="" type="checkbox"/> NET PAC INTERNATIONAL LLC	Email	Add Supplier Contact(s)* Order Contact Supplier
<input checked="" type="checkbox"/> BROWN ENTERPRISE SOLUTIONS LLC	Email	Add Supplier Contact(s)* BROWN GEORGE
<input checked="" type="checkbox"/> ROBY SERVICES LTD	Email	Add Supplier Contact(s)* SLEDGE MICHELLE

3 Results

Subject: RFx Invitation Custom table cloths Send me a copy

Dear Madam, Dear Sir,

5

If you would like to notify all Bidders and/or Suppliers who state they offer a commodity associated with the items listed in the quick quote solicitation, click **Notify Commodity Suppliers** from the **Prepare RFx** tab, and then click **OK** to confirm.

- ▲ If your quick quote solicitation is marked as MBE set-aside, once processed into the purchase requisition, you will only be allowed to proceed if you select an MBE Bidder or Supplier. Therefore, you should click **Do not Notify Commodity Suppliers**, and then click OK to confirm.

▲ Please note all quick quote solicitations are posted on the Ohio|Buys Public Portal.

CANCELING A QUICK QUOTE SOLICITATION

Overview

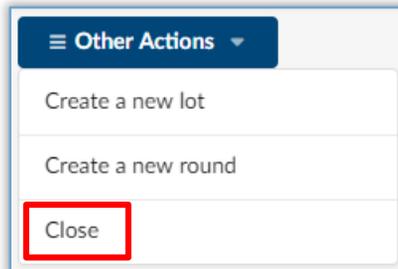
- What's Covered: This section discusses how to cancel a quick quote solicitation
- Used When: A quick quote solicitation has been distributed and posted on the Ohio|Buys Public Portal, but needs to be cancelled

Step-by-Step Instructions for Cancelling a Quick Quote Solicitation

Note that, if necessary, a quick quote solicitation can be cancelled at any time. If it becomes necessary to cancel a quick quote solicitation, please contact your Agency Admin. Only an Agency or State Admin has the authorization to cancel a quick quote solicitation. The actions they will take are presented below.

Click **Other Actions** and select **Close** from the drop-down menu.

1



UPLOADING A SUPPLIER'S RESPONSE

Overview

- What's Covered: This section discusses how to upload a quick quote response on behalf of a Bidder or Supplier who is unable to submit their quote directly within Ohio|Buys
- Used When: A Bidder / Supplier cannot directly upload their own response to a quick quote solicitation in Ohio|Buys

Step-by-Step Instructions for Uploading a Supplier's Response

▲ Please note, uploading a Bidder or Supplier's response should be used as a last resort, not as the norm.

1

Log in to Ohio|Buys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

From the **Sourcing Projects** page:

- a) Enter search terms to find your quick quote solicitation and then click **Search**.
- b) Click the **Pencil (✎)** icon to open your quick quote solicitation.

2

Label	Code	Type	Commodity
DOH personal safety light	BPM000558	Quick Quote	Personal safety light

Navigate to the **View RFX Activity** tab of your quick quote solicitation. To submit a response for a Bidder or Supplier, click the **Plus (+)** icon next to their name.

3

Name	Tax ID Number	Email	Logins	Last login	NDA	Invitation Acknowledged	Items Quoted	Submitted Prop
LIGHTHOUSE SOLUTIONS GROUP	010849512							0 +
VANCE OUTDOORS INC	542072038	2	1	8/21/2019 4:19:57 PM	☑		1/1 (100%)	1 +
ROBERT LOUIS GROUP LLC	462293269	2	2	8/21/2019 4:35:31 PM	☑		1/1 (100%)	1 +

If the Bidder / Supplier's name does not appear on this tab, they will need to be invited to the quick quote solicitation. Select the Bidder / Supplier on the **Add Suppliers** tab to include the Supplier of the solicitation. Once added, their name will appear on the **View RFX Activity** tab.

Step-by-Step Instructions for Uploading a Supplier's Response

The Bidder / Supplier's proposal is displayed in a pop-up window. To submit a response on their behalf:

a) Enter the **Unit price** and **Deliv. date** for each line item.

▲ You should also add comments and documentation to the header of the response to explain why an offer was submitted on the behalf of the Bidder / Supplier.

b) Click **Submit**.

4

Review the information displayed in the pop-up window to confirm you have entered responses for all applicable line items. Click **Submit my proposal** to finish submitting a proposal on the behalf of a Bidder / Supplier.

5

ANALYZING AND AWARDING A QUICK QUOTE SOLICITATION

Overview:

- What's Covered: This section covers the process of comparing Bidder and/or Supplier responses to a quick quote solicitation, making the award, and updating the initial purchase requisition
- Used When: Awarding a quick quote to a Bidder or Supplier

Step-by-Step Instructions for Analyzing and Awarding a Quick Quote Solicitation

1

Log in to Ohio|Buys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

From the **Sourcing Projects** page:

- Enter search terms to find your quick quote solicitation and then click **Search**.
- Click the **Pencil (✎)** icon to open your quick quote solicitation.

2

The screenshot shows the 'Sourcing Projects' page with search filters for Keywords, Commodity, Project Type, and Status. A 'Duplicate Project' button is visible. Below the filters is a table with columns: Label, Code, Type, and Commodity. A row for 'Custom table cloths' (Code: BPM000770, Type: Quick Quote, Commodity: Paper table cloth) has a pencil icon highlighted with a blue box labeled 'B'.

Navigate to the **View RFX Activity** tab of your quick quote solicitation. From this tab, you can see a list of the invited Bidders and/or Suppliers, how many emails were sent to each Bidder or Supplier, the last time a Bidder or Supplier logged in to Ohio|Buys, and which Bidders and/or Suppliers have submitted responses. To view any of the displayed information in more detail, click on any of the displayed hyperlinks.

3

The screenshot shows the 'View RFX activity' page for project 'BPM000770 - Custom table cloths'. The 'View RFX activity' menu item is highlighted with a red box. The main content area shows a table for 'Lot1 : Custom table cloths (Round 1)' with columns: Name, Tax ID Number, Email, Logins, Last login, NDA Invitation Acknowledged, Items Quoted, Submitted Proposals, Declined, and Status. The table is highlighted with a red border.

Name	Tax ID Number	Email	Logins	Last login	NDA Invitation Acknowledged	Items Quoted	Submitted Proposals	Declined	Status
NET PAC INTERNATIONAL LLC	770710916	2	1	3/3/2020 10:42:26 AM	✓	1/1 (100%)	1	0	●
BROWN ENTERPRISE SOLUTIONS LLC	900353698	1					0	0	●
ROBY SERVICES LTD	311705782	2	1	3/3/2020 10:46:18 AM	✓	1/1 (100%)	1	0	●

▲ If you have not received enough responses to proceed with awarding the quick quote, you can extend the solicitation period by creating a new round. This process is discussed in more detail in [Creating a New Round](#).

Step-by-Step Instructions for Analyzing and Awarding a Quick Quote Solicitation

Navigate to the **Analyze & Award** tab. From this tab you can review a summary of each submitted response, download responses, compare responses by item, and make an award.

- ▲ Awards cannot be made until the solicitation end date has been reached. To view the full details of a response, click on the associated **Proposal** hyperlink.
- ▲ While reviewing the summary of responses displayed in the table on this tab, you may notice some responses have a **Proposal Progress** of less than 100%. This indicates the response may contain a quote for an alternate item or may have only submitted quotes for some of the items in your quick quote solicitation.
- ▲ To download all of the responses or compare responses by line item, click the **Select All Checkbox** () icon and then click **Download selected proposals**.
- ▲ To compare response by item, click the **Select All Checkbox** () icon and then click **Compare quotes by item**. A pop-up window will appear. From here you can select the item you would like to compare and then click **Compare Proposals**.

4

Sourcing project: BPM000770 - Custom table cloths - Analyze & Award

Proposals | Awarding

Requests: Custom table cloths 1 x | Status: In progress x Submitted x | Search | Reset

3 Selected | Download selected proposals | Compare Quotes by Item

Suppliers	Proposal	Status	Documents	Proposal Progress	Questionnaire Progress	Submitted (UTC-5)	Total
BROWN ENTERPRISE SOLUTIONS LLC	Proposal # 1	Submitted		100%	0%	3/3/2020 10:48:56 AM	125,000 USD
ROBY SERVICES LTD	Proposal # 1	Submitted		100%	0%	3/3/2020 10:46:17 AM	75,000 USD
NET PAC INTERNATIONAL LLC	Proposal # 1	Submitted		100%	0%	3/3/2020 10:42:24 AM	89,900 USD

Once you have finished analyzing the responses and are ready to make an award, click the **Award** () icon in the Decision column for the Bidder or Supplier for which you would like to create a draft award. Click **OK** to confirm. Please note this will not notify the associated Bidder or Supplier.

5

Proposal	Status	Documents	Proposal Progress	Questionnaire Progress	Submitted (UTC-5)	Total	Decision
Proposal # 1	Submitted		100%	0%	3/3/2020 10:48:56 AM	125,000 USD	
Proposal # 1	Submitted		100%	0%	3/3/2020 10:46:17 AM	75,000 USD	

Step-by-Step Instructions for Analyzing and Awarding a Quick Quote Solicitation

Scroll down to the **Award Justification** section. Click the **Selector** icon and choose the option which most closely describes your reasoning for selecting the Bidder or Supplier for the award. Add additional **Award Explanation** comments. The values inputted into this field will be pulled into the quarterly STS Report produced by DAS and submitted to the Controlling Board. Click **Save** after adding this information.

6

▲ Users must perform a quick quote prior to referencing an STS contract on a requisition. A quick quote must be in OhioBuys for purchases referencing an STS contract because DAS will use quick quote data to populate the STS Report submitted to the Controlling Board; if there is no quick quote, the data required for this report will not be captured. The justification for selecting an STS Contract Supplier must be documented in the award justification fields. For more information, please refer to [Creating an After the Fact Quick Quote Solicitation](#).

Navigate to the **Review Award Results** tab. From this tab, you can:

- ▲ Compare the draft award amount to the original purchase requisition amount in the **Item synthesis** and **Award overview** sections.
- ▲ Notify Bidders and/or Suppliers by clicking the associated **Notification** hyperlink. This option should be used if you would like to notify a Bidder and/or Supplier before a purchase order is created.

To update the purchase requisition associated with this quick quote with the award details, click the **Origin P.R.** hyperlink for the Bidder or Supplier you are planning to award to.

7

Supplier	Lot / Round	Proposal	Decision	Notification	Origin P.R.
BROWN ENTERPRISE SOLUTIONS LLC	Lot 1 / Round 1	Proposal # 1	Not selected	Not selected: to be notified	[REQ0000005905] Custom ta...
NET PAC INTERNATIONAL LLC	Lot 1 / Round 1	Proposal # 1	Not selected	Not selected: to be notified	[REQ0000005905] Custom ta...
ROBY SERVICES LTD	Lot 1 / Round 1	Proposal # 1	Selected	Selected : to be notified	[REQ0000005905] Custom ta...

Requests	Round #	Items	Supplier	Ref. amount	Target amount	Bid amount	Total target savings	Grand total:	Identified sa
Custom table cloths	1	Custom table cloths	ROBY SERVICES LTD	200.00		75.00		125.00	

Step-by-Step Instructions for Analyzing and Awarding a Quick Quote Solicitation

8

The selected purchase requisition is displayed. Click **Update Prices**.

Update prices

9

Click the **Checkbox** () icons for the line items you wish to update, click **Save & Close**, and then click **OK** to confirm.

Update pricing after solicitation

Save Save & Close

<input type="checkbox"/>	Label	Supplier	%	Unit	QTY	Amount	Price	Currency	Already in P.R.	Updated on
<input type="checkbox"/>	Custom table cloths	ROBY SERVICES LTD	100.00	10.00	75.00	7.50	USD	United States dollar	yes	

10

The purchase requisition has been updated with the draft award details.

- ▲ If there is any justification documentation for the award that needs to be uploaded, please attach it to the header of the purchase requisition.
- a) You need to update the Order Supplier before you submit the purchase requisition. To do this, navigate to the line item and click the **Pencil** () icon.
- b) Complete the Order Supplier field. Normally this is the location from which the Supplier will fulfill your order.
- c) Update the Supplier Contact field, if applicable. This is the user at the Supplier who will receive updates about your order.
- d) Click **Save & Close**.

Item

Save Save & Close Reset Allocations Save & New

Describe the item

ID: 8440

Name: Bostitch InPower(TM) Spring-Powered Desktop Stapl... Item Code:

Ordered Quantity: 2.00 Each

Commodity: 44121615 - Staplers Profile ID:

Select Supplier

Supplier: GBEX LLC

Order Supplier: GBEX LLC

Supplier Contact: ELLINGTON TREY

Supplier Location:

Step-by-Step Instructions for Analyzing and Awarding a Quick Quote Solicitation

- e) Once you are ready to submit this purchase requisition for the remaining approvals, click **Submit requisition**.

Requisition : REQ0000005905 - Custom table cloths (Draft)

Save Save & Close **Submit requisition** << Back to Catalog Update prices Reset Allocations Create Quick Quote

Other Actions

▲ - Requisition lines have one or more NON-blocking alerts

Header

Requisition ID: 5905

Status: Draft

Type: Standard Purchase Receiving Required?: No

Requisition Label: Custom table cloths

Requester: DASRequisitioner1 Training Origin Code:

Organization:

Ship to

P000376 PRT DAS GSD STATE PRINTING DAS GSD State Printing Columbus

PRT DAS GSD STATE PRINTING
DAS GSD State Printing
4200 Surface Road
43228-1395 Columbus
Ohio

Attn:

- ▲ After your requisition has been submitted for review, you can check its approval status at any time.
- ▲ If you would like to print the details of your requisition, click the **Print** icon in the top right of the page.
- ▲ To view the main agency approvers for your requisition, expand the **Workflow Main Approvals** section on the Header tab of the purchase requisition.

Workflow Main Approvals

Approval Type	Approved By	Purchase Requisition	Agency	Label	Approval Date	Approved	Performer
5		Req. 6/25/2019	Dept of Rehab & Corrections	Fiscal		<input type="checkbox"/>	STEELE BRANDON
5		Req. 6/25/2019	Dept of Rehab & Corrections	Fiscal		<input type="checkbox"/>	FiscalAgencyApprover1 SIT
6		Req. 6/25/2019	Dept of Rehab & Corrections	Final Approval		<input type="checkbox"/>	STEELE BRANDON
6		Req. 6/25/2019	Dept of Rehab & Corrections	Final Approval		<input type="checkbox"/>	Final Agency Approver 1 SIT

4 Result(s)

- ▲ On the **Workflow** tab, you can see where your requisition is in the approval process. Steps in green are completed steps, while steps in orange are in progress. As action is taken on your requisition, the Approval History section on the bottom of this page will be updated with the names of the individuals who have taken action on the purchase requisition.
- ▲ You will receive an email notification whether your purchase requisition is rejected or fully-approved. Once a purchase requisition is fully-approved, a purchase order will automatically be created and sent to the associated Supplier.

CREATING A NEW ROUND

Overview

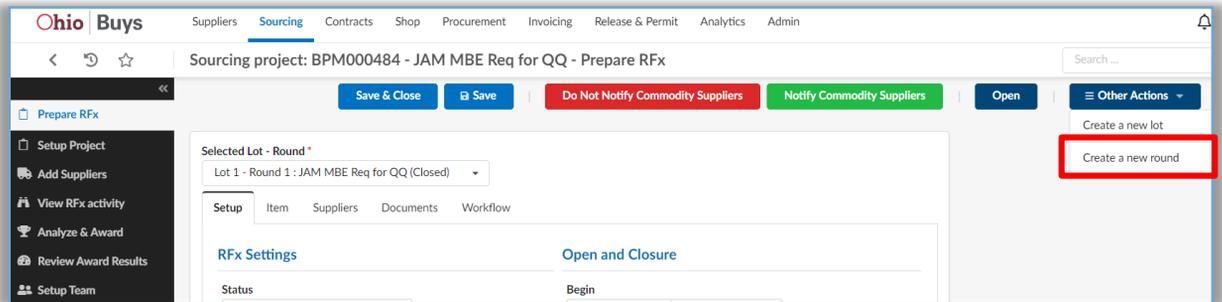
- What's Covered: This section outlines the process for creating a new round for a quick quote solicitation
- Used When: A quick quote solicitation does not receive the required number of quotes to be awarded to a Supplier

Step-by-Step Instructions for Creating a New Round

- ▲ A new round should be created in the event a minimum of 3 quotes were not received in response to the previous round of your quick quote solicitation and you are seeking to reference an STS contract on your purchase requisition.

Log in to Ohio|Buys and open the quick quote solicitation for which you would like to create a new round. On the **Prepare RFX** tab, click **Other Actions** and select **Create a new round**.

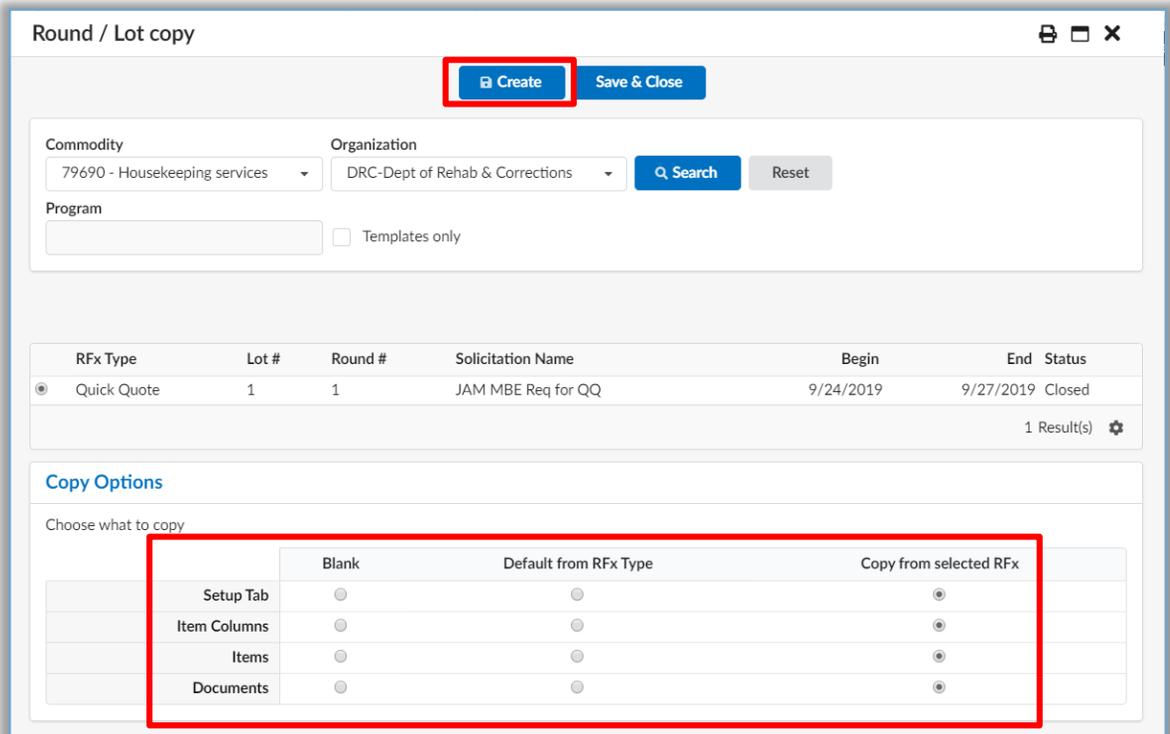
1



- ▲ Although you also have the option to create a new lot, this option should not be used for quick quote solicitations. A new lot is created when there are parallel solicitations occurring that have the same requirements, and may be awarded to multiple Bidders and/or Suppliers. For example, trying to build homeless shelters in multiple cities.

Confirm which tabs you want to be copied from the previous round. Click **Create** and then click **Continue** to acknowledge the pop-up message.

2



Step-by-Step Instructions for Creating a New Round

The new round has been created. From the **Prepare RFx** tab:

- Enter new **Begin** and **End** dates and times.
- If desired, enter the **Process** and **Summary**. These fields provide additional details regarding the basis for award (Process) and the purpose of the solicitation (Summary) and are visible to the public.
- Click **Save**.
- Click on the **Suppliers** header and then select the Bidders and/or Suppliers that you wish to include in the new round.

Sourcing project: BPM000484 - JAM MBE Req for QQ - Prepare RFx

Buttons: Save & Close, **Save**, Send

Prepare RFx

Setup Project

Add Suppliers

View RFx activity

Analyze & Award

Review Award Results

Setup Team

Selected Lot - Round *

Lot 1 - Round 2 : JAM MBE Req for QQ (Draft)

Setup | Item | Suppliers | Documents | Workflow

RFx Settings

Status: Draft Save as a template

RFx Type *: Quick Quote

Solicitation Name *: JAM MBE Req for QQ en

Lot # ①: 1 Round # ②: 2

Commodity Suppliers

Notified? Yes No

Advanced Options

- Buyers can acknowledge receipt of bids
- Adding Offline Quote
- Publicly Post Opportunity
- Require suppliers to respond to RFx invitation
- Check the presence of a total column grid
- Suppliers can partially bid

Open and Closure

Begin: 12:00:00 AM

End *: 12:00:00 AM Close automatically

No end date ③

Enable for Public Posting

Publication begin date: 12:00:00 AM

Publication end date: 12:00:00 AM

Process

Process: en

Summary

Summary: en

3

Continue to make changes to the solicitation as necessary to capture the details of the new round. When you are ready to send out the new round, click **Send** from the **Prepare RFx** tab. Refer to [Creating a Quick Quote Solicitation](#) and [Releasing a Quick Quote Solicitation](#) if needed.

- ▲ Creating a new round does not remove the quotes that were received from a previous round. You are able to toggle between rounds and view their associated quotes by using the **Selected Lot – Round** drop-down menu.

APPENDIX

CREATING AN AFTER-THE-FACT QUICK QUOTE SOLICITATION

Overview

- What's Covered: This section outlines the process for creating an after-the-fact quick quote solicitation
- Used When: A quick quote solicitation is required for a purchase that has already received a quote(s) from a Supplier(s)

Step-by-Step Instructions for Creating a Quick Quote Solicitation

- ▲ All quick quote solicitations should be completed and logged within Ohio|Buys. In the event a quick quote was completed outside of Ohio|Buys and you would like to reference an STS contract, an after-the-fact quick quote should be created within Ohio|Buys.
- ▲ All solicitations must be associated with a purchase requisition. That purchase requisition should be created prior to the quick quote being created in Ohio|Buys (Refer to *05.01.01 Submit a Goods and/or Services Request*).

Log in to Ohio|Buys and open the purchase requisition for which you would like to create a quick quote solicitation. The purchase requisition must be in *Draft* or *Initialized* status. Click **Create Quick Quote**.

1

The screenshot shows the Ohio|Buys Procurement interface. The breadcrumb trail is: Requisition: REQ0000003485 - DMHS safety light (Draft). The main navigation bar includes: Suppliers, Sourcing, Contracts, Shop, Procurement (active), Invoicing, Release & Permit, Analytics. Below the navigation bar are buttons: Save, Submit requisition, << Back to Catalog, Create Quick Quote (highlighted with a red box), and Other Actions. The main content area shows the requisition details: Requisition ID: 3485, Status: Draft, Type: Standard Purchase, Receiving Required: Yes. On the right, there is a 'Ship to' section with a dropdown menu showing 'P003576 DOH CENTRAL RECEIVING Columbus' and the address: 35 E. Chestnut St., 43215 Columbus.

The associated line items from the purchase requisition will be automatically carried over to a new quick quote solicitation. You can edit these details prior to releasing the quick quote solicitation for responses. From this page:

- a) Enter the **Sourcing Project Label**, which should be a short description of ~~what~~ the purpose of the quick quote solicitation.
- b) Confirm and make any necessary updates to the **Commodities** and/or **Organizations** fields. These fields are pre-populated based on your purchase requisition.
- c) Enter today's date as the **Open Date**.
- d) Click **Go to Sourcing Project**.

2

The screenshot shows the Ohio|Buys Sourcing Event interface. The breadcrumb trail is: Sourcing Event. The main navigation bar includes: <, <<, >>, >. The main content area is divided into two sections: 'Add to an existing Sourcing Project' and 'Create a New Sourcing Project'. The 'Create a New Sourcing Project' section is pre-populated with the following details: Sourcing Project Label: DMHS Safety Light, Sourcing Type: Quick Quote, RFX Type: Quick Quote, Commodities: 46182502 - Personal safety light, Organizations: DRC100000 OPERATION SUPPORT CENTER DR..., Open Date: 10/2/2019, ID: 1450. A 'Go to Sourcing Project' button is located in the top right corner. Callouts A, B, and C highlight the Sourcing Project Label, Commodities, and Open Date fields respectively. Callout D highlights the 'Go to Sourcing Project' button.

Step-by-Step Instructions for Creating a Quick Quote Solicitation

The quick quote solicitation has been created. From the **Prepare RFX** tab:

- Enter today's date as the **End** date and a time that is 30 minutes from the current time. The 30 minute timeframe is to provide you ample time to enter in all of the Bidder and/or Supplier's quotes.
- Enter the **Process** and **Summary**. These fields provide essential additional details regarding the basis for award (Process) and the purpose of the solicitation (Summary) and are visible to the public.
- Click **Save**.
- Navigate to the **Setup Project** tab.

Sourcing project: BPM000555 - DMHS safety light - Prepare RFX

Exit Save Send Other Actions

Selected Lot - Round *
Lot 1 - Round 1 : DMHS safety light (Draft)

Setup Item Suppliers Documents Workflow

RFX Settings

Status: Draft Save as a template

RFX Type: Quick Quote

Solicitation Name *: DMHS safety light en

Lot # ①: 1 Round # ①: 1

Commodity Suppliers

Notified? Yes No

> Advanced Options

Open and Closure

Begin: 8/21/2019 9:56:50 AM

A End *: 8/21/2019 12:00:00 AM Close automatically No end date ①

Enable for Public Posting

Publication begin date: 8/21/2019 9:56:50 AM

Publication end date: 8/21/2019 12:00:00 AM

B **Process**

This quote will be given to the Supplier who can provide the k en

Summary

① Our organization requires safety lights for use in mobile oper en

C

D

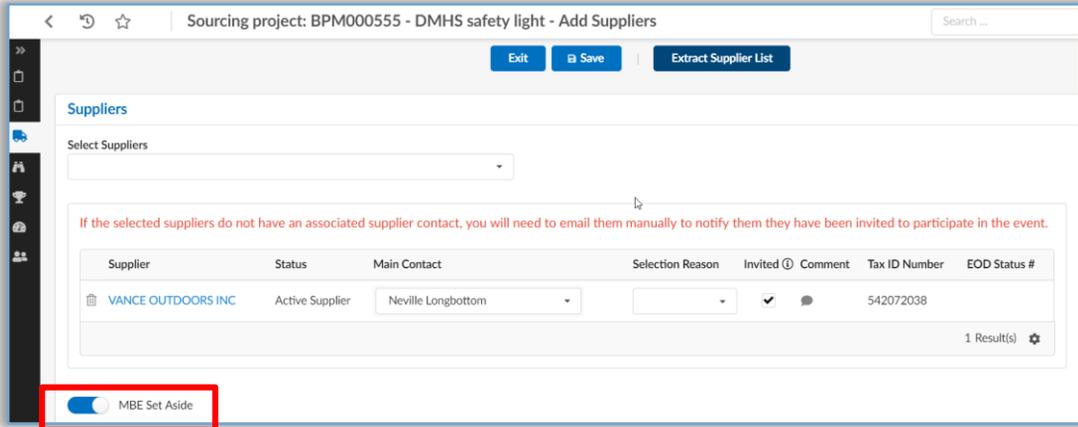
3

Step-by-Step Instructions for Selecting Bidders/Suppliers

Navigate to the **Add Suppliers** tab.

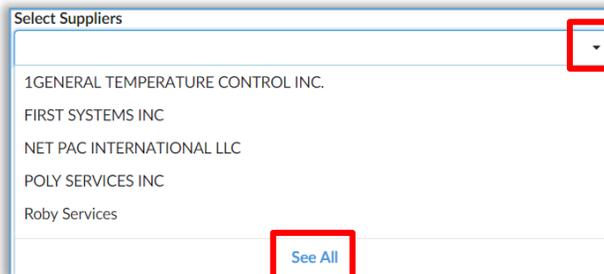
- ▲ If you are searching for Bidders and/or Suppliers who hold a valid MBE status, slide the **MBE Set-Aside** indicator on this tab.

1



Click the **Selector** (▾) icon on the **Select Suppliers** field and the select **See All**.

2



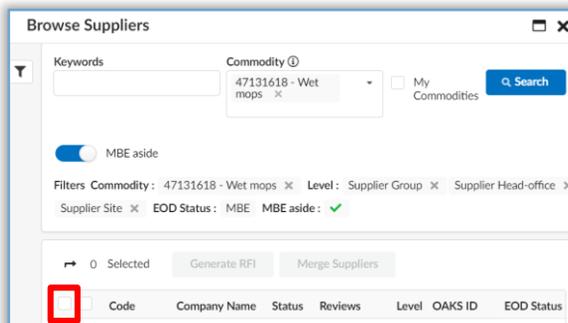
A list of potential Bidders and/or Suppliers is displayed. By default this list will be filtered to only show Bidders and/or Suppliers who offer the commodity for your solicitation is for.

- ▲ You can search for the names of Bidders/Suppliers that were contacted using the search criteria in the **Keywords**, **Commodities**, and/or **Dealers** fields.
- ▲ If you cannot locate the Supplier you need, you can remove the **Commodity** filter by select the **X** icon next to the commodity name.

Click the **Checkbox** () icon to select a particular Bidder or Supplier or click the **Checkbox** () icon next to the **Code** header to select all of the displayed Bidders and/or Suppliers.

3

- ▲ Only add Bidders/Suppliers that you plan to add a bid on their behalf



Step-by-Step Instructions for Selecting Bidders/Suppliers

4

Click the **X** icon in the top right of the window once you are done selecting Bidders and/or Suppliers.

5

Click **Save**.

Review the list of identified Bidders and/or Suppliers. If the Bidder or Supplier does not have a **Main Contact**, select a name from the drop-down list. If you would like to remove a Bidder or Supplier, click the **Trash Can** (🗑️) icon next to their name and then click **Save**.

▲ If the Bidder and/or Supplier you would like to add does not have a contact, they will need to add one before they can be added to the quick quote. Please contact your Bidder/Supplier via phone or email and direct them to the Contact Management job aid on the procurement website: <https://das.ohio.gov/Divisions/General-Services/Procurement-Services/eProcurement#52261220-supplier>

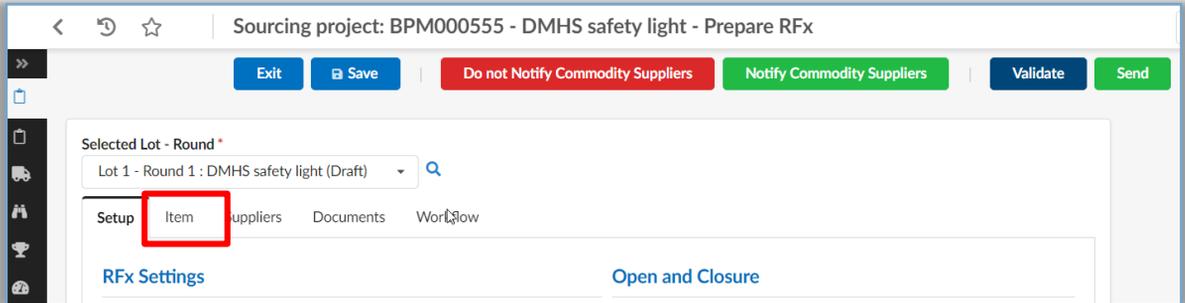
6

Supplier	Status	Main Contact	Selection Reason	Invited	Comment	Tax ID Number	EOD Status #
🗑️ LIGHHOUSE SOLUTIONS GROUP	Active Supplier	BART JEFFREY (43068@00001886181.com)	Known and used	☑️	💬	010849512	
🗑️ ROBERT LOUIS GROUP LLC	Active Supplier	Thompson Robert	Known and used	☑️	💬	462293269	
🗑️ VANCE OUTDOORS INC	Active Supplier	Neville Longbottom		☑️	💬	542072038	

Step-by-Step Instructions for Releasing a Quick Quote Solicitation

Navigate to the **Prepare RFX** tab, click on the **Item** header.

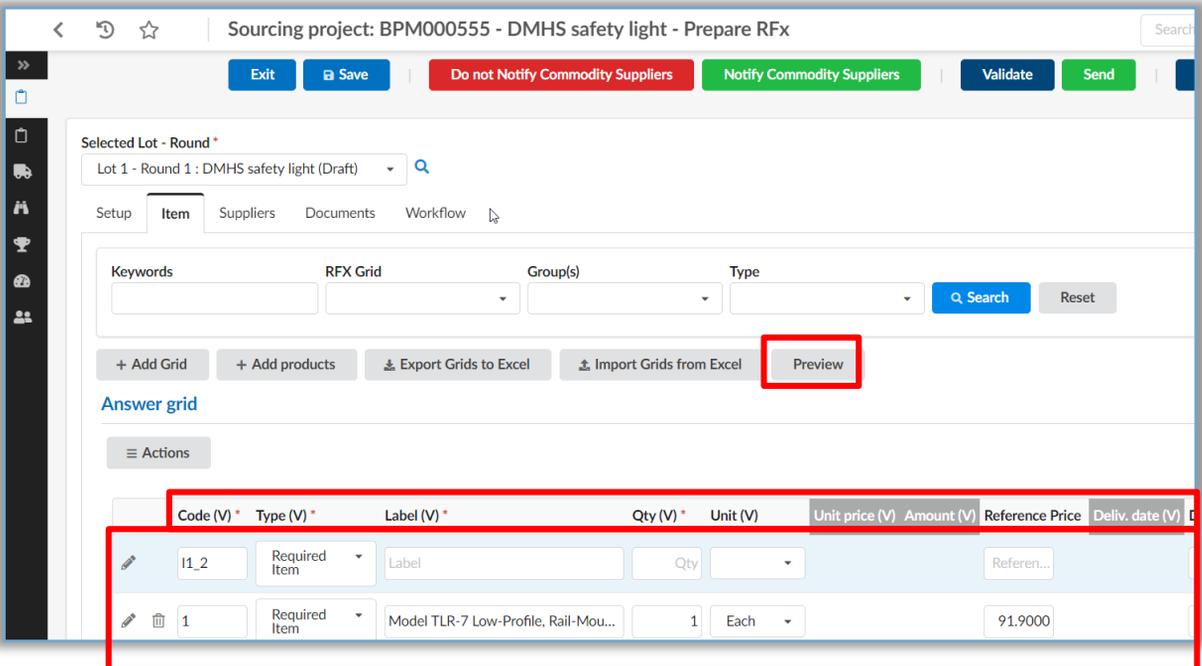
1



The line items associated with your solicitation are displayed.

- ▲ The information displayed in the grid is populated from your purchase requisition. Review the displayed information and make any necessary updates to the **Label, Unit, Delivery Date, Manufacturer, SKU Number, and Detailed Description**.
- ▲ There will always be one blank line item displayed in the grid. This is where additional line items can be added to a quick quote solicitation, if needed. (e.g., an alternate item added by a Bidder or Supplier)

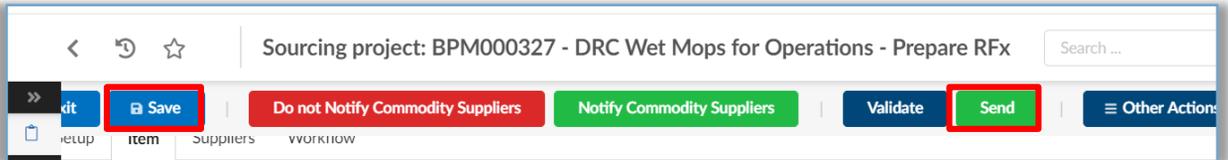
2



Step-by-Step Instructions for Releasing a Quick Quote Solicitation

Once you are done making changes click **Save**. When you are ready to open your quick quote solicitation, click **Send**.

3



To release the after-the-fact quick quote solicitation, complete the following steps on the displayed pop-up window:

- Confirm the Bidder and/or Supplier list.
- Change the sending mode on all Bidders and/or Suppliers to *Mail*.
- Revise the email **Subject** and **Text** to read as follows.

Subject: *State of OH Solicitation: No Action Required*

Message:

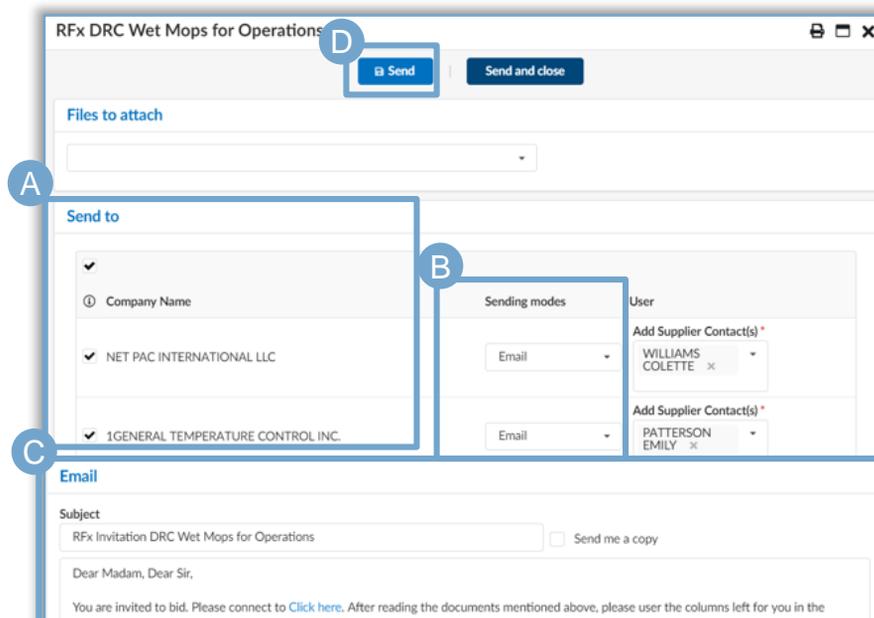
Dear Madam or Sir,

A solicitation that you have participated in previously has been updated. There is no further action required on your part at this time. Thank you.

- ▲ Bidders and Suppliers will not receive an email notifying them of this solicitation if their Sending Mode is changed to *Mail*. However, the message should be changed to avoid confusion if Step B is mistakenly missed.

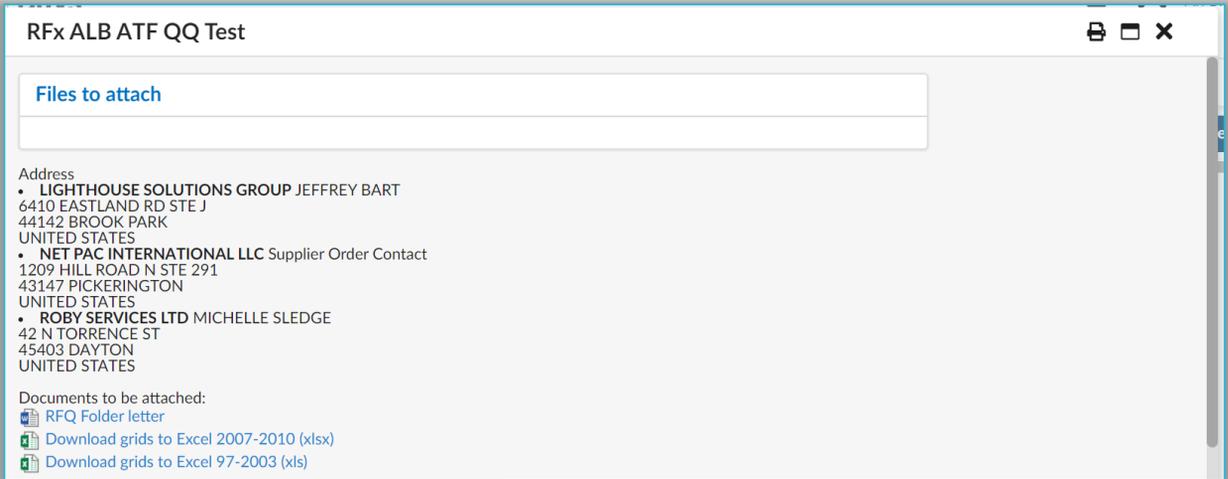
4

- Click **Send** and then click **OK** to open the quick quote solicitation.



Step-by-Step Instructions for Releasing a Quick Quote Solicitation

- ▲ The mailing addresses of the Bidders and/or Suppliers will appear at the top of the screen.



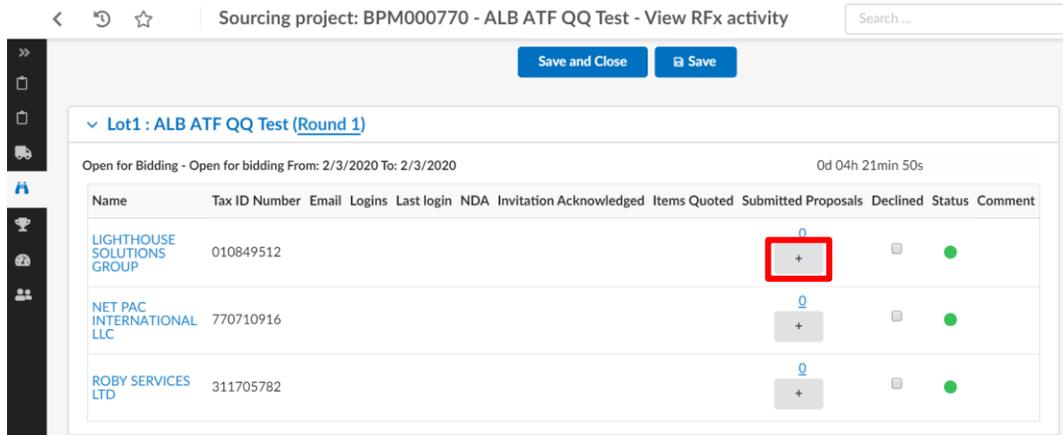
4

- f) Click the X icon at the top right side of the screen to close.

Step-by-Step Instructions for Entering a Bid on Behalf of a Supplier

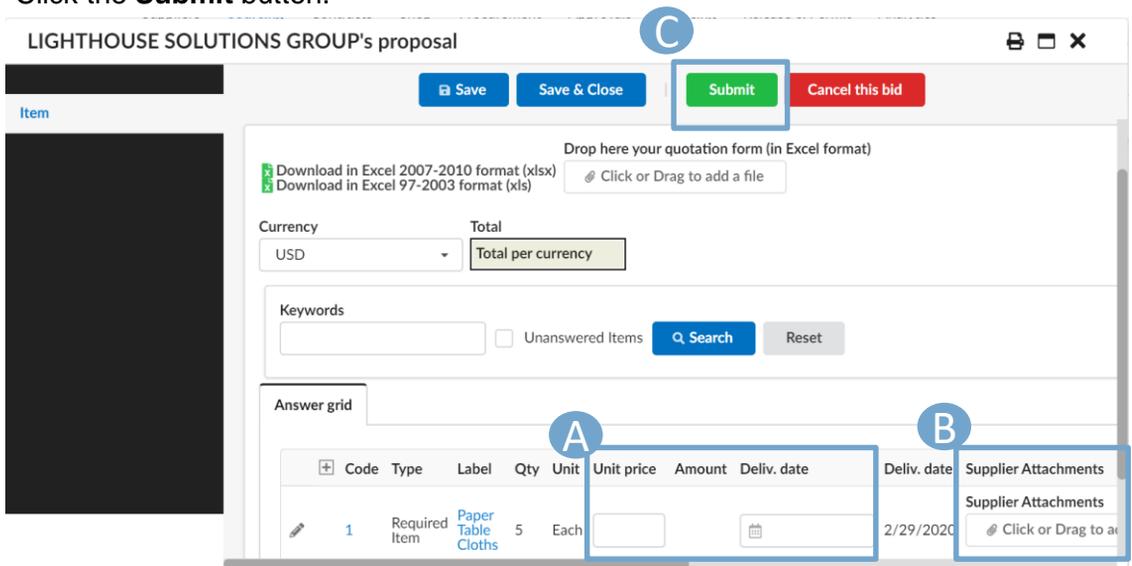
Navigate to the **View RFX Activity** tab. Select the **+** icon next to a Bidder and/or Supplier to enter their bid information on their behalf.

1



- Type the data from the Bidder or Supplier's bid into each available field (e.g. Unit Price, Deliv. Date).
- Attach the Bidder or Supplier's email and bid using the **Supplier Attachments** field.
- Click the **Submit** button.

2



- Click **Submit my proposal** to confirm that you would like to submit the final bid.



- Click the **X** icon to close the screen.
- Repeat this process for all Bidder and/or Suppliers.

Step-by-Step Instructions for Entering a Bid on Behalf of a Supplier

2

- ▲ The process for designating a winner for an after-the-fact quick quote is the same as all other quick quote solicitation processes.
- ▲ Refer to [Analyzing and Awarding a Quick Quote Solicitation](#) for step-by-step instructions.

Version Control

Version	Publish Date	Summary of Updates	Pages Updated
1.0	May 2020	Initial draft	All (1-80)
1.1	6/11/20	Updated screenshot for Currency column	29
1.2	8/19/20	Updated screenshot of My Sourcing Projects	14