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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If you have questions or need additional assistance, please contact Ohio Shared Services Contact Center via email (OBM.SharedServices@OBM.ohio.gov) or phone (877-644-6771).
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.

▲ Please note: Unless you are planning to create a contract based on the results of the quick quote, you must create a purchase requisition prior to the creation of the solicitation.

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.
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 Solicitation.

▲ Note that if you are creating a solicitation in reference to a contract with a hosted or punchout catalog you must add items from the catalog to your cart before clicking Create Solicitation. Freeform items will not update properly.

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 quick quote solicitation is for. Note that this will also be the title that Bidders / Suppliers see.

b) Set the RFx Type to Quick Quote.

c) Confirm and make any necessary updates to the Commodities and/or Organizations fields. These fields are pre-populated based on your purchase requisition.

d) Enter the Open Date. This informs when responses will be opened and reviewed.

e) Click Go to Sourcing Project.
Step-by-Step Instructions for Creating a Quick Quote Solicitation

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

a) Enter a **Closing Date** and time, which is the date and time responses are due from Bidders and/or Suppliers.
b) Set the **Amendment** field to **No**.
c) (Optional) Indicate the **Inquiry Begin Date** and time, and **Inquiry End Date** and time, which is the period during which Suppliers can submit questions about the solicitation.

▲ For more information on Supplier Inquiry, please consult the Creating, Managing and Awarding Solicitations Learner Guide.

a) 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 will automatically populate with the information contained in the Request Description field of the purchase requisition and can be edited as needed.
The quick quote solicitation has been created. From the **Prepare RFx** tab:

d) Continued: 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.

▲ Under **Advanced Options**, the Publicly Post Opportunity checkbox is engaged by default, but can be disabled if needed.

▲ If the Publicly Post Opportunity checkbox is disengaged, please also set the Commodity **Suppliers Notified** selector to **No**.

e) Click **Save**.

After saving your solicitation, click **Submit**. Note that this will **NOT** send your quick quote to Suppliers.
Step-by-Step Instructions for Creating a Quick Quote Solicitation

From the **Setup Project** tab:

a) Confirm the displayed information and make updates as needed.
b) Click **Save**.

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. You should also add all of the relevant approvers for your associated purchase requisition as team members on the Setup Team tab so they have access to review your quick quote award details.

a) Search for your team members using the **Select Team** field. Assign them a Profile of **Contributor (Sourcing Project)**.
b) Click **Save**.

▲ Note that only the user listed as **Responsible** for the project is able to release and reward the quick quote.
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.
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.

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.

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

c) Click in the **Contract** field to reveal any contract numbers associated with the line item.
d) Navigate to the **Contracts** header in the Main Menu Navigation Bar and select **Browse Contracts** from the drop-down menu.

![Browse Contracts](image)

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

![Keywords Search](image)

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.

![Dealers](image)

⚠️ 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](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.
How to Create and Release a Quick Quote Solicitation

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.

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.

▲ You can also filter your results to only show Suppliers with a Supplier Contact by toggling the Supplier Contact on File radio button.

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

Click Save.
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**.

▲ 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.
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
How to Release a Quick Quote Solicitation

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

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

   ![Sourcing project: SRC0000000857 - MWK Quick Quote 10-8 - Prepare Solicitation](screenshot)

   - **Sealed Bids**
     - The “sealed bids” option has been selected. All the bids will be available only after the bid due date and the sealed-bid opening session.

   ![Sourcing project: BPA00007777 - Custom table clothes - Prepare RFX](screenshot)

2. The line items associated with your solicitation are displayed.

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

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

a) Select the files you would like to attach to the *invitation to bid* email.

b) 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.

c) 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.

d) 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 unless the Publicly Post Opportunity checkbox has been unchecked.

▲ This means the solicitation is visible to all Suppliers regardless of whether or not they were invited to participate.
Click **OK** in both pop-ups that appear.

Once a solicitation is posted Suppliers will be able to access it from the public solicitation page. Before Suppliers are able to respond to the solicitation, they will be required to complete the following acknowledgement and then indicate if they will or will not bid. Supplier acknowledgements can be tracked on the View Solicitation Activity of a solicitation.

**Acknowledgement**

By clicking the below "I Agree", you are agreeing to the following:

1. If you are quoting against a contract in which you are a current supplier, the terms of that contract will apply.
2. If this solicitation includes terms and conditions, the terms of the solicitation will apply.
3. If this neither references a current contract nor includes terms and conditions attached to the solicitation, you are agreeing to the State Standard Terms and Conditions linked below.

I Agree  Read State Terms & Conditions

**Receipt acknowledged on 5/27/2021 1:24:23 PM (UTC-4)**

To answer to this RFx, please confirm that you intend to bid.

- WILL BID: our intent is to respond to this RFx.
- NO BID: we will not be able to respond to this RFx.

Submit
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
How to Cancel a Solicitation

Step-by-Step Instructions for Cancelling a Solicitation

If a solicitation needs to be cancelled, the user responsible for the solicitation must do so by creating a new round and utilizing the Cancellation RFx type.

1. Open the sourcing project that you intend to cancel in Ohio|Buys and navigate to the Prepare Solicitation tab.

2. Click on the Other Actions drop-down menu and select Create a New Round.

3. Update the RFx Type field to Cancellation and update the Amendment field to Yes.

4. Write any public notes associated with the cancellation in the Summary field.

5. Click Submit.

The cancellation will follow the same approval process as the original solicitation. Since there is no evaluation process, once all approvals are received the sourcing responsible user must click Send and then Begin Evaluation to push the solicitation into the cancelled status. Prior to clicking Send, please note that you must place the Begin Date at some point in the future. (i.e., if it is 1/1/2021 at 12:00:00 PM, the date must be at least 1/1/2021 at 12:01:00 PM) All originally invited Bidders and/or Suppliers as well as those who have already submitted a response will be automatically notified of the cancellation.
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.
How to Analyze and Award a Quick Quote Solicitation

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

1. After the response date closes, solicitations can be evaluated. Log in to Ohio|Buys. From the Main Menu Navigation bar, click Sourcing and then select Sourcing Projects from the drop-down menu.

2. The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click Search. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.
   ▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the More Filters ( ) icon.

3. Open the sourcing project you would like to edit by clicking the Pencil ( ) icon.

4. Navigate to the Prepare Solicitation tab and click Begin Evaluation to start the response evaluation process.
Prior to opening solicitation responses, all DAS Office of Procurement Services, DAS Office of State Printing and Mail Services, and BWC solicitations will be submitted to the Auditor of State for certification. Prior to certification, the user responsible for the solicitation will be unable to unseal solicitation responses. Once certified by the Auditor of State, the individual who is responsible for the solicitation will receive an email notification notifying them the responses can be unsealed.

Under the **Sealed Bids** header on the Prepare Solicitation tab, click the **Lock** icon.

Click **OK** in the pop-up window to unseal the bids.

Navigate to the **View Solicitation Activity** tab of your quick quote solicitation. From here 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, which Bidders and/or Suppliers have submitted responses, and the EOD status of any respondents (if applicable).

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](#).
How to Analyze and Award a Quick Quote Solicitation

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**.

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.

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.

▲ **Users must perform a quick quote prior to referencing an STS contract on a requisition.** A quick quote must be in Ohio|Buys 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.
How to Analyze and Award a Quick Quote Solicitation

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

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

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

13. 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.

   ▲ If there are Dealers available in the contract they will appear as the options contained in the Order Supplier field. The Supplier should remain the primary Supplier on the contract. (e.g., Supplier – HP Inc. Order Supplier – Brown Enterprise Solutions)

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

▲ 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.

▲ 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.

▲ After it has been awarded, the quick quote will remain in a status of “Under Evaluation.”
Once the purchase requisition has been processed into a purchase order, users should move the quick quote from a Under Evaluation status into a Closed status. To do this, navigate to the **Prepare Solicitation** tab of the quick quote and click **Approve**. Note that you will not be able to update the award after moving a quick quote into a Closed status.
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
How to Create a New Round

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.

▲ 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.
How to Create a New Round

Step-by-Step Instructions for Creating a New Round

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

a) Select No on the Amendment? field.
b) Enter new Begin and End dates and times.
c) Enter new Inquiry Begin and Inquiry End dates and times.
d) 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.
e) Click Save.
f) Click on the Suppliers header and then select the Bidders and/or Suppliers that you wish to include in the new round.

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.
Note that if a new round is issued, Suppliers will need to resubmit their responses. Please ensure that this is communicated clearly to your participating Suppliers as appropriate. For instructions on how to quickly resubmit a response, please direct Suppliers to the Viewing and Responding to Solicitations Learner Guide.
ANSWERING SUPPLIER QUESTIONS

Overview

• **What’s Covered**: The process for responding to Bidder and/or Supplier questions in the Inquiry section of a solicitation in Ohio|Buys
• **Used When**: Replying to Bidder or Supplier inquiry about a solicitation in Ohio|Buys
How to Answer Supplier Questions

Step-by-Step Instructions for Answering Supplier Questions

1. Log in to OhioBuys. From the Main Menu Navigation bar, click Sourcing and then select Sourcing Projects from the drop-down menu.

2. The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click Search. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

   ▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the More Filters (▼) icon.

3. Open the sourcing project you would like to edit by clicking the Pencil (✍) icon.

4. Navigate to the Inquiry tab.
The Inquiries page is displayed. Users are able to search for specific questions using keywords. Click anywhere on a question line to open it.

The question is displayed. To respond to the question, a user must first click the Forward (➡) icon.
Update the **Message Type** to **Public Response**. Doing so will post the Supplier’s question publicly so that other Suppliers are able to see the State’s response. The user should then select themselves in the **Recipients** field.

▲ **Clean up the Supplier’s question by removing any sensitive or identifying information, as well as correcting any mistakes in spelling or grammar.** This will ensure that the question is clear when it is posted to the public.

Once the Supplier’s question has been cleaned up, click **Send**.

Navigate to the forwarded message and click the **Reply** (➡️) icon.
Ensure that the **Message Type** is set to Public Response. Indicate the **Recipients** of the response. You can choose both internal contacts on the project team and Supplier contacts.

▲ Select **All internal team members** to send a reply to all users in the team tab.

Type the details of your response in the free text entry field. Use the **Click or Drag to add files** button to attach documents as necessary.

**10** When you are ready, click **Send** to distribute your reply.

**11** Click **Save** and then click **Post Inquiry to the Public**. This will post publicly all of the questions and answers with the public response type.
UPDATING A PURCHASE REQUISITION WITH AN EXISTING QUICK QUOTE

Overview

• **What’s Covered**: The process for updating the line items on a purchase requisition with the results of an existing quick quote solicitation in Ohio|Buys
• **Roles**: Requesters, Requisitioners, Quick Quote Procurement Users
• **Used When**: A quick quote solicitation has already been performed for a purchase requisition and needs to be linked to a new purchase requisition
How to Update a Purchase Requisition
With an Existing Quick Quote

Step-by-Step Instructions for Updating a Purchase Requisition

Note that the process outlined in this section should only be leveraged if a solicitation created from a purchase requisition has already been conducted, and there was a problem with that purchase requisition that requires the creation of a new one. This process will not work to link a brand new purchase requisition to an existing solicitation.

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

2. The Browse Requisitions page is displayed. On this page, you can enter search terms to locate your purchase requisition. Enter search terms in the Keywords search field and then click **Search**.

   ▲ To access additional filters not pictured, click the **More Filters** (▼) icon.

3. Open the purchase requisition you would like to duplicate by clicking the **Pencil** (✏) icon.

4. Click **Other Actions** and select **Duplicate** from the drop-down menu. Make any necessary updates to the revised purchase requisition.

5. Click **Create Solicitation**.

6. In the **Add to an existing Sourcing Project** section, search for the name or SRC number of the solicitation you would like to reference on the purchase requisition. When you find it, select it from the drop-down menu.
How to Update a Purchase Requisition With an Existing Quick Quote

Step-by-Step Instructions for Updating a Purchase Requisition

Input the RFx Type and Open Date. When you have finished filling in these fields, click Go To Sourcing Project.

▲ Users can simply put the current date in the Open Date field if they are not planning to release a new solicitation.

Navigate to the Review Award Results tab.

Click the Origin PR hyperlink for the purchase requisition to be linked to the solicitation.

When you open the purchase requisition, the line item will be updated with the details from the solicitation.
## Version Control

<table>
<thead>
<tr>
<th>Version</th>
<th>Publish Date</th>
<th>Summary of Updates</th>
<th>Pages Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>May 2020</td>
<td>Initial draft</td>
<td>All (1-80)</td>
</tr>
<tr>
<td>1.1</td>
<td>6/11/20</td>
<td>Updated screenshot for Currency column</td>
<td>29</td>
</tr>
<tr>
<td>1.2</td>
<td>8/19/20</td>
<td>Updated screenshot of My Sourcing Projects</td>
<td>11</td>
</tr>
<tr>
<td>2.0</td>
<td>10/8/2020</td>
<td>Updated based on R3 changes to Quick Quotes</td>
<td>7, 8, 9, 19, 20, 23, 24, 27-31.</td>
</tr>
<tr>
<td>2.1</td>
<td>12/21/20</td>
<td>Updates to View Solicitation criteria screen (cannot submit bids with “+” button)</td>
<td>24</td>
</tr>
<tr>
<td>2.2</td>
<td>2/15/2021</td>
<td>Added clarification on Auditor process</td>
<td>24-29</td>
</tr>
<tr>
<td>2.3</td>
<td>3/1/2021</td>
<td>Noted that the Publicly Post Opportunities checkbox is actionable</td>
<td>9</td>
</tr>
<tr>
<td>2.4</td>
<td>3/10/2021</td>
<td>Added additional details on the Setup Team tab</td>
<td>10</td>
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<tr>
<td>2.5</td>
<td>3/16/2021</td>
<td>Added information on the Inquiry fields where appropriate (even though they are not mandatory for QQ). Added screenshots of EOD Status in Awarding and Reviewing sections. Removed references to Solicitation Posted button.</td>
<td>8, 9, 19, 20, 22, 25, 26, 31, 32</td>
</tr>
<tr>
<td>2.6</td>
<td>3/22/2021</td>
<td>Added a note that the PR must be created prior to the QQ. Added a note that an awarded QQ remains in a status of “Under Evaluation”</td>
<td>3, 29</td>
</tr>
</tbody>
</table>
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<tbody>
<tr>
<td>3.0</td>
<td>3/24/2021</td>
<td>Adds Supplier Questions section</td>
<td>33-37</td>
</tr>
<tr>
<td>3.1</td>
<td>3/26/2021</td>
<td>Noted the ability to deselect the Notify Commodity Suppliers checkbox.</td>
<td>9</td>
</tr>
<tr>
<td>3.2</td>
<td>4/13/2021</td>
<td>Noted the visibility of the non-blocking alert next to Supplier records when they do not have any Supplier contacts, Added section on updating a PR with an existing Solicitation</td>
<td>16, 38-40</td>
</tr>
<tr>
<td>3.3</td>
<td>5/20/2021</td>
<td>Noted to State users that Suppliers must acknowledge T&amp;C before submitting a response, added a note about Suppliers needing to resubmit if there is a new round</td>
<td>21, 34 (both new pages)</td>
</tr>
<tr>
<td>3.4</td>
<td>6/8/2021</td>
<td>Noted that QQs in reference to hosted/punchout contracts MUST start from catalog items. Noted that the Summary field will now auto-populate with the contents of the Request Description. Added a note about Dealers on the Order Supplier field. Noted the need to Close a QQ by clicking Approve.</td>
<td>7, 8, 30, 31</td>
</tr>
<tr>
<td>3.5</td>
<td>7/22/2021</td>
<td>Added note that there is a radio button to filter by Suppliers with Supplier Contacts.</td>
<td>16</td>
</tr>
</tbody>
</table>