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.

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.

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

a) Enter today’s date as the **End** date and a time that is 30 minutes from the current time.
b) 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.
c) Click **Save**.
d) Navigate to the **Setup Project** tab.
Step-by-Step Instructions for Selecting Bidders/Suppliers

1. 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.

2. Click the Selector ( ▼ ) icon on the Select Suppliers field and the select See All.

3. 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 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.
   ▲ In the case of After-the-Fact Quick Quote Solicitations, only add Bidders/Suppliers that you plan to submit a bid on 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 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 (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: https://das.ohio.gov/Divisions/General-Services/Procurement-Services/eProcurement#52261220-supplier
Step-by-Step Instructions for Releasing a Quick Quote Solicitation

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

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., and alternate item added by a Bidder or Supplier.)
How to Create an After-the-Fact Quick Quote Solicitation

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**.

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

a) Confirm the Bidder and/or Supplier list.
b) Change the sending mode on all Suppliers to **Mail**
c) 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.

▲ 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.

d) Click **Send** and then click **OK** to open the quick quote solicitation.
The mailing addresses of the Suppliers will appear at the top of the screen.

f) Click the X icon at the top right side of the screen to close.
How to Create an After-the-Fact Quick Quote Solicitation

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 Supplier to enter their bid information on their behalf.

1. Navigate to the View RFX Activity tab. Select the + icon next to a Supplier to enter their bid information on their behalf.

2. a) Type the data from the Supplier's bid into each available field (e.g. Unit Price, Deliv. Date).
   b) Attach the Supplier’s email and bid using the Supplier Attachments field.
   c) Click the Submit button.
   d) Click Submit my proposal to confirm that you would like to submit the final bid.
   e) Click the X icon to close the screen.
   f) Repeat this process for all Suppliers.
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 07.01.02 Ohio Buys Analyze and Award a Quick Quote Solicitation JA for step-by-step instructions.