QuoteWire™ Training Manual

Quotes are broadcast only to active subscribing suppliers who match commodity codes and subscription area (agency, metro, state, region, nationwide), and who are registered to be notified by email. You may add supplemental suppliers to your quote if you wish.

Logging in a Quote

Enter all the basic information about the quote.

Click Log Quote from the Buyers tab.

On the screen, red asterisks indicate that information must be entered in the required field.

1. In Quote Name, enter a name for your quote.
2. In Quote Number, enter your quote number. This field is alpha numeric.

   Note: In Quote Number you may also view existing quote numbers by clicking on the link next to the Quote Number box. A pop-up window appears listing all of your agency's quotes. Click the close button' X' to close the pop-up window (please note: you may not re-use existing quote numbers).

3. In Fiscal Year, select the year. This field defaults to the current calendar year.
4. In Quote Due Date, enter a date (mm/dd/yyyy format) or use the calendar icon to select a date.
5. In Due Time, enter the time the quote is due. The time is in 15 minute increments and the time will default to PM. Click the drop-down menu to choose AM.
6. In Delivery Requirements, enter the number of days given for delivery after receipt of order. This is not a required field for you, but it is required for vendor responses.
7. In Shipping Notes, enter shipping notes, such as FOB destination.
8. The quote contact information is displayed for you automatically. (This is the quote writer's information). If you need to change the information, delete and reenter.
9. In Shipping Information, the default selection is "Same as Contact Information". If you want the order to arrive at your office, keep this option

selected. If you want the order to arrive at a different address, deselect this option and enter the shipping address in the boxes provided.

Click **Next** to continue.

Enter Quote Line Items

1. Enter a description of the item. This field can take up to 700 characters.

2. Enter a quantity.

3. Enter a unit of measure, for example: each, pair, feet, inches, etc.

   Note: To continue adding line items, click Add 5 More Lines.

4. Optionally, you can add Additional Specifications, Insurance and Additional Requirements, or Terms and Conditions. You may copy and paste text into these fields.

Choose **Next** to continue.

Uploading Documents

You may upload documents for your quote on this screen.

1. Enter document title (100 characters maximum).

2. Click browse. A Windows pop-up menu will open. Select the appropriate document title and click on Open. The window will close.

3. On QuoteWire™ screen, click on Upload. Your document will appear under the Document Title section. You may upload the following file formats: Text, Microsoft Word, Excel, PowerPoint, Adobe PDF, DWG files, and graphic files such as .gif, .tif, .bmp, or .jpg. If necessary, you may remove your document by clicking Remove under the Actions column to the right.

4. It is not necessary to review or approve documents in QuoteWire™. You may remove documents at any time before the quote is posted.

Selecting Commodity Codes

Enter keywords to find matching commodity codes. Select the most exact commodity codes for your quote.

Groups (indicated by a group abbreviation) are listed on this screen. Note that if you click on the name of the group, the categories below it (indicated by the information in parentheses) will be shown.

1. At Search Criteria, enter a keyword: <keyword> and click Search. The commodity codes matching your keyword search are displayed in the Commodity Code Search Results screen. Always try to enter keywords as singular, not plural. Exact keyword matches will appear in blue bold lettering.

2. Click the boxes beside the codes you want to select.

   Important Note: As you view the search results, note the information in the Code Type column. If the code type is 'Category', be aware that you are actually choosing a broad category with codes underneath it. Depending upon the category selected, you may broadcast to vendors that have nothing to do with the goods or services you are seeking.

3. Choose Save to save the selected commodity codes, or choose Cancel to cancel the search results and any commodity codes selected on this screen. You are returned to the main Commodity Codes screen. Commodity codes selected prior to performing this search will have a checkmark beside them. If you select a category from a commodity code group, the group's name is displayed in bold; likewise, if you select a code from a commodity code category, the category's name is displayed in bold.

4. Click the "+" sign next to the commodity code group description that appears in bold text. Click on the text to see the categories below it. (You will need to scroll down to see the categories displayed.) Click on the "+" sign next to the category to see the codes below the category. In this way, you can check your commodity code selections to make sure that the most appropriate commodity codes have been selected. To close the categories, click on the "-" sign.

5. To view the suppliers who match the commodity codes you selected, click View Matching Suppliers at the top of the screen. The Matching Suppliers screen appears. Click Return at the bottom of the Matching Suppliers screen to return to the Commodity Codes screen where you can modify or add additional commodity codes until you are satisfied.

6. Click Save to save your selected commodity codes.

Click **Next** at the bottom of the screen to continue or choose to refine your broadcast list (see below).

Refining Broadcast List

You may narrow your broadcast list if you wish.

1. When you have finished selecting your commodity codes, click on Refine Broadcast List at the bottom of the screen. The total number of suppliers matching the commodity codes you have selected will appear.

2. Scroll down to search criteria. Select states you wish to include in your broadcast list. If you are selecting more than one state, press the ctrl button and choose the states you wish. To deselect a state, press ctrl key and click on state.

3. To restrict your broadcast list to a city or cities, enter in name of city and click the Add button. You may add up to 10 cities. To remove a city, highlight and click Remove button.

4. To refine your broadcast list using self-declared attributes, check the box next to desired attribute (African-American owned, small business, etc.).

5. If you agency utilizes the Managed Programs feature, you may also refine your broadcast list to your Managed Programs (example: WMBE)

6. Once you have selected your search criteria click on Search button. Your new broadcast list will appear. If you are not satisfied with the results, change your search criteria and click Search again. If broadcast list meets your approval, click the **Next** button in the middle of the screen.

Previewing Quote

Review all the quote information before you post your quote.

NOTE: This is the only opportunity you will have to review your quote. Quotes broadcast within 15 minutes of completion.

Quote Preview Screen

1. Scroll through the Quote Preview screen to review the quote information you entered. You can click Edit to update or revise any information you want to change.

2. Click **Post Quote** at the bottom of the screen to post your quote.

Reviewing Quote Responses

When the quote due date and time arrives, the quote's status will automatically change to "Closed". When you are ready to review the quote and award it, follow these steps.

1. Click View Quotes from the Buyers tab.

2. Under the Search Criteria, Choose the status of closed and then click Search.

3. Find your quote from the list presented, or search for your quote by entering in quote name, quote number or the contact name and clicking Search. The search will default to open quotes.

4. Click Details from the Actions column of the selected quote. The Quote Details screen appears showing the suppliers who responded to the selected quote, the total amount of their respective quotes, whether the quote was complete or partial, and other information.

5. Click the Suppliers tab to see the suppliers who responded to your quote. You can define which suppliers are listed by selecting a response status from the box at the top center of the tab. Click **Search**. The list of suppliers displayed is based on the response status you selected.

Quote Details Suppliers Tab

1. Select the supplier whose detailed information you want to view. Click Details from the Actions column of the corresponding supplier. The Supplier Quote Details screen appears. Use this screen to view the quote details submitted by a supplier. You can compare prices and award quotes from this screen.

2. Click on the Line Items tab to view the line items. Click Details from the Actions column to view individual supplier quotes for the corresponding line item. The Line Item Supplier Responses screen appears. You can compare prices and award quotes from this screen.

Awarding Quote

You can award the entire quote to one supplier or award the quote to individual suppliers by line item. To award a quote by supplier, do the following:

1. Click Details from the Actions column of a selected quote.

1. From the Quote Details screen, click the Suppliers tab. A listing of all suppliers who responded to the quote is presented.

2. Select the supplier whose detailed information you want to view. Click Details from the Actions column of the corresponding supplier. The Supplier Quote Details window appears. Use this screen to view the quote details submitted by a supplier. You can compare prices and award quotes from this screen.

4. Click "Award now?" to award a selected line item to the supplier.

5. When you have finished awarding line items to this supplier, click Award Selected Supplier. The Quote Award Notification screen appears. Use this screen to review the automated Award Notification e-mail and enter award notes in the text box, if desired.

6. The e-mail will be sent to the awarded Supplier when you click **Send This Award Email**.

7. Click Return to return to the Quote Details screen.

Awarding a Quote by Line Item

1. Click Details from the Actions column of a selected quote.

2. From the Quote Details screen, click the Line Items tab. A listing of all quote line items is presented.

3. Click Details from the Actions column of the selected line item. You can compare quotes to this line item by supplier and award line items from this screen. To award a line item quote to a selected supplier, do the following:

    - Select the supplier you want to award the quote to.

    - Click "Award now?" to award the line item to the selected supplier.

    - Click Award Selected Supplier. The Quote Award Notification screen appears. Use this screen to review the automated Award Notification e-mail and enter award notes in the text box, if desired.

    - Click **Send This Award Email** to send the e-mail to the awarded Supplier. Click **Return** to return to the Quote Details screen.

Updating Quote Due Date

If there is a need to extend out the quote due date, you will be able to extend it in the system.

1. Click on Update Due Date from the Actions column of a selected quote.
2. Change the Due Date by using the calendar function or typing in the new date.
3. Change the Due Time.
4. Click **Save**.

The system will automatically extend out the quote to the new date and time.

Updating Quote Status

Update the quote's status. The status changes available are: Awarded and Cancelled.

1. Click Update Status from the Actions column of a selected quote.
2. In the Update Quote Status To box, select the status you want to update to.
3. Click **Save**.

If you change the status to Awarded before awarding line items, the system will lock you out and you will not be able to award the line items.