NC E-Procurement
Instructor-Led Training Guide

eQuote Course
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eQuote Course Overview

Introduction

**NC E-Procurement** is an online purchasing system that is currently being used by North Carolina State Agencies, Community Colleges, Local Education Authorities (LEAs), and local governments.

The instructor-led NC E-Procurement eQuote course helps participants understand how to complete eQuote functions in NC E-Procurement. This course instructs participants on how to create and award an eQuote.

eQuote functions much like a punchout session in the NC E-Procurement System. Users will punch out to create an eQuote, using the eQuote functionality. Suppliers are able to respond to these requests for quotes using the same system. Due to functionality required to create and respond to an eQuote, we are unable to create a real eQuote during training. As a result, this course will be conducted using a simulation.

Participants must follow along with the eQuote course material in order to progress through the steps in the simulation. If the steps are not followed correctly, the user will not advance to the next screen. Hints will be given if an incorrect click is made or when rolling over a text entry field.

**In addition, please keep in mind that the dates, users, suppliers and scenarios used in this material are for training purposes only.** The information is included to demonstrate system functionality. Please note that the dates may not be consistent with the actual dates of your training and the user/supplier information may be fictitious.

**Course Topics**

- eQuote Process
- Create an eQuote
- Select eQuote Suppliers
- View, Evaluate, and Award eQuote Responses
Audience

- Purchasing Agents
- Purchasing Managers
- Requisitioners with the ability to create eQuotes

Prerequisites

- Knowledge of the NC Procurement Policies and Procedures
- Basic eRequisitioning skills
- Appropriate NC E-Procurement role

Course Objectives

After training, participants will be able to:

- Initiate an eQuote
- Search for and select suppliers
- Evaluate supplier responses
- Select items from supplier responses and add items to an eRequisition

Estimated Time

3 Hours
eQuote Process Overview

Overview and Benefits

eQuote is a tool within NC E-Procurement that can be used to solicit and review quotes from multiple suppliers for a good and/or service. The tool is used for open market purchases that do not require the creation of a Request for Proposal (RFP) in the Interactive Purchasing System (IPS).

eQuote is recommended in the following situations:
- The item is not listed on term contract and is less than your entity's delegation amount
- The item is a high dollar or high volume term contract item under your entity's delegation amount
- A rush order is needed (response within 4 hours)
- Competitive quotes from 3 or more suppliers are needed

The benefits of eQuote are:
- Provides clear definitions of the desired item; can also add attachments
- Ability to send one eQuote to as many different suppliers as desired
- Electronic processing - no paperwork, phone calls or faxes are necessary
- Faster response time from suppliers
- Responses from suppliers with exact items, substitutes, add-ons, and alternatives
- Ability to view a clear audit trail of your eQuotes
- Responses can be tabulated to compare supplier responses and make faster and easier decisions
- Cost Savings
- Clearly marked Historically Underutilized Businesses (HUBs) and local suppliers
eQuote Process

The following diagram outlines the eQuote process. Each piece of the process is described below the diagram.

1. **Identify Need**: Determine if it is appropriate to create an eQuote.

2. **Create eRequisition**: Begin the process of creating an eRequisition.

3. **Enter eQuote details**: The eQuote functionality provides you with the flexibility to enter detailed product specifications in a format that can be viewed by suppliers. There is ample space for additional specifications and terms and conditions, as well as the ability to include up to two electronic file attachments with a size of 1.5MB or less each, which can be used to clarify the specified items or detail terms and conditions.

4. **Select suppliers**: Users can select suppliers by name or by category search, such as “Office Supplies.” 2nd and 3rd level subcategories are also used to include more specific details in the search criteria. In addition, users can search for suppliers based on whether they provide a “Rush Response” (response within 4 hours). Once the suppliers are located, the user can select all suppliers to receive the eQuote (it is recommended that the number of suppliers not exceed 20, however, it is possible to include more than that). Only suppliers that have agreed to the NC E-Procurement Terms of Use and elected to participate in eQuote on the Vendor Registration site are displayed through eQuote.

5. **Review and submit eQuote**: The next step is a confirmation of details and suppliers. This stage includes sending the eQuote to the supplier.

6. **Supplier responds to eQuote submission**: Once the eQuote is submitted, suppliers will respond with their prices and specifications for the received eQuote. Each supplier can submit a price response, add items, make substitutions, add alternates, and provide details and attachments to the buyer’s request.
7. **Review response and select items to add to eRequisition**: After a reasonable amount of time, the user can review the status of the request and will be able to see the supplier response and select items from that response.

8. **Complete eRequisition**: Once items have been selected or awarded from the supplier responses, they are added as line items to the eRequisition.

**Review Questions**

**Instructions:**
Answer the following questions. Please feel free to review the contents of the course and talk with classmates in order to determine the answers.

**Questions:**
1. What are the 8 stages of creating an eQuote?
2. True or False: The first step to create an eQuote is to create a new eRequisition.
3. True or False: eQuotes do not leave a clear audit trail.
4. What are the two methods buyers can use to locate a supplier in eQuote?

**Key Summary Points**

- eQuotes should be created if: 1) you can’t find an item(s) on a term contract, 2) you need a rush order, 3) you need to find three suppliers to provide competitive prices for an item, and/or 4) the items you need are priced below the formal bid requirements, replacing the more manual quoting process.
- eQuote allows suppliers to provide quicker response times.
- A user only needs to create one eQuote for a desired item and can send it to as many suppliers as they wish, but 20 is the recommended maximum.
- Suppliers can be selected through 2 methods in eQuote: 1) Search for a specific supplier by name and 2) Search for a list of suppliers based on the three tiered categories displayed.
Creating an eQuote

Overview

The first step to create an eQuote is to create an eRequisition. Once an eRequisition is created, users will search for ‘eQuote’ or ‘punchout’ on the Catalog Home page, and then click the ‘eQuote Punchout Site’ link. Contact your Security Administrator if you need eQuote functionality but do not see the eQuote link in your search.

The individual who creates the eQuote must also review and award the purchase to the selected suppliers. If you need your supervisor or purchasing agent to award it, it is recommended that you send the order information as a non-catalog item to your supervisor and allow him/her to create the eQuote. The supervisor should delete the existing non-catalog line item and add the item as an eQuote.

It is highly recommend that you gather all necessary information and finalize all documentation prior to starting the eQuote. The NC E-Procurement System will automatically log you out after 30 minutes of being idle. If this should happen, the eRequisition is automatically saved. However, the eQuote information is only saved if the user clicks the ‘Save As Draft’ button. It is recommended that the user save their work at the end of every eQuote page.

As you are walking through the steps to create an eQuote, please remember that the hints should help guide you. There is also a ‘Menu’ button at the bottom of the screen that will return you to the Main Menu. If stuck or off track, click ‘Menu’ and select the correct section.

Scenario

Your user name for this training course is “Requester.” You are in need of some T-Shirts, both short sleeved and long sleeved, with a logo screen-printed on them. After checking the available term contracts, you decide to do an eQuote.

One of the suppliers, NC Logowear, has provided several T-Shirt orders for you in the past. You would like to compare their pricing with other suppliers.
Walkthrough: Creating an eQuote & Adding Items

1. Click the ‘eRequisition’ link in the ‘Common Actions’ Portlet, or click ‘Create’ on the Menu Bar and then select ‘eRequisition’.
2. Enter ‘eQuote’ in the search field.

3. Click the ‘Search’ button to search for the eQuote site.
4. The ‘eQuote Punchout Site’ link will appear in the green ‘Supplier Punchout Catalog Resources’ box. Click the link to punch out to the eQuote site.

5. The eQuote punchout site will open on the ‘Create eQuote’ page.
Note: The header for the eQuote pages contains a step-by-step guide through the eQuote process. These numbered steps function similarly to the Shortcut Menu in the NC E-Procurement System. The step that you are currently on is highlighted by a grey-shaded number. We are currently on ‘Step One: Enter eQuote Info’.

Note: The eQuote title will default to the eRequisition title, but it is possible to change the eQuote title if needed.

6. In the ‘eQuote Response Due’ field, select “May 8, 2015.”

Note: The ‘eQuote Response Due’ field is required. It will default to six days from the date the eQuote is created if the field is not populated.

Note: You can check the ‘Rush Response’ checkbox to specify that you would like to receive a response within four business hours. It is recommended that you not check this box unless it is necessary – it may limit the number of responses you receive.

7. In the ‘Delivery Needed By’ field, select “May 29, 2015.”

Note: You can check the ‘Rush Delivery’ checkbox to indicate that you would like the item to be delivered within two business days.

8. In the ‘How many items would you like to display?’ field, enter “2” and click on the ‘Display’ button to add an item(s) to the eQuote. The Items section displays an area to create an item line.
9. In the ‘Item Description’ field for the first item, enter “Medium T-Shirts, short sleeve, logo on left, Navy Blue.”

**Note:** Be as specific as possible when describing the item. Include manufacturer information and or any specifications you have. Add an attachment if necessary to include all of the information.

**Note:** The Supplier SKU field can be used if the user knows the Supplier SKU number for the product.

10. In the ‘Qty’ field, enter “25.”

11. In the ‘Item Description’ field for the second item, enter “Medium T-Shirts, long sleeve, logo on left, Navy Blue.”

12. In the ‘Qty’ field, enter “30.”

13. Click on the ‘Add Item’ button to enter another item description. A third item description line displays.
14. In the third ‘Item Description’ field, enter “Logo Design.”

15. In the ‘Qty’ field, enter “1.”

16. In the ‘Unit’ drop-down menu, set the Unit of Measure to ‘Dollar.’

17. Select the ‘Service’ radio button to select the appropriate item type.

**Note:** When submitting an eQuote request for a service, the ‘Unit’ field must be set to ‘Dollar’ and the ‘Qty’ field should be ‘1.’ When the eQuote is awarded, the system will automatically set the appropriate ‘Qty,’ ‘Price,’ and ‘Unit of Measure’ fields on the eRequisition. Do not complete the ‘Supplier SKU’ field for a service item.

**Note:** If you wish to have shipping charges included in the eQuote, you can add them to the request as a separate service line item.

18. Click ‘Finish Item Edits’ to save the item information.

19. In the ‘Additional Information’ field, enter “Shirts must be 100% cotton.”

20. Note the ‘Attachments’ section. It is possible to attach two 1.5MB attachments, i.e., a logo for the shirts.
21. In the ‘External Notes’ field, enter “Please contact at 555-1234 if you have any questions about the logo.”

**Note:** External Notes are used to communicate information to the supplier. It is important that you enter your name and phone number and/or email address so the suppliers can contact you if they have any questions. If you do not enter your contact information, it will not display on the eQuote. The contact information we entered in the step above is for training purposes only.

22. In the ‘Internal Notes’ field, enter “Shirts to be used for Summer conferences.”

**Note:** Internal Notes are used to communicate information within your organization. Suppliers will not see this information.

23. Click the ‘Continue’ button at the bottom of the screen. The practice exercise page displays.
Practice Exercise  Adding Items

Instructions:
Using the scenario below, complete the practice exercise. You will be practicing the steps you just learned to create a new eQuote. Use the following section to help guide you through the process.

Scenario:
Your Training Department needs new Monitors for the computer lab. You've purchased from A/V Solutions before and want to try them again. You decide to send an eQuote for the monitors since you need 10 of them. To meet the quoting requirements in your organization, you will need quotes from at least three suppliers.

Be sure your eQuote title reflects what you are looking for. You need to display 2 line items since you will also need the cords to hook up your new monitors. In the description field, make sure you are very clear so the supplier can give you an accurate description and price.
Practice: Adding Items

1. In the green ‘Supplier Punchout Catalog Resources’ box, click the ‘eQuote Punchout Site’ link to punch out to the eQuote site.

2. The eQuote punchout site will open on the ‘Create eQuote’ page.
3. In the ‘eQuote Title’ field, enter “LCD Computer Monitors eQuote.”

4. In the ‘eQuote Response Due’ field, select “April 10, 2015.”

5. In the ‘Delivery Needed By’ field, select “May 1, 2015.”

6. In the ‘How many items would you like to display?’ field, enter “2.”

7. Click on the ‘Display’ button to display the item description fields.
8. In the ‘Item Description’ field for the first item, enter “LCD Monitor, 20 inch, HDMI input.”

9. In the ‘Qty’ field, enter “10.”

10. In the ‘Item Description’ field for the second item, enter “HDMI cable, 12 foot.”

11. In the ‘Qty’ field, enter “10.”

12. Click the ‘Finish Item Edits’ button.
13. In the ‘Additional Information’ field, enter “Must be able to adjust the height of the monitor.”

14. In the ‘External Notes’ field, enter “Please only quote HDMI cables available in black. Contact at 555-555-1234 with any questions.”
15. In the ‘Internal Notes’ field, enter “Monitors are for computer lab.”

16. Click on the ‘Continue’ button at the bottom of the screen.

**Note:** If you’re not ready to add suppliers, click the ‘Save As Draft’ button to keep any changes made to the eQuote.

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**Key Summary Points**

- Once the eRequisition containing the eQuote is submitted, approvers who have access to your work can read internal and external notes.

- The supplier can only read external notes.
Selecting eQuote Suppliers

Overview

Users can search for eQuote suppliers by two different methods:

**Search for a specific supplier(s):**
The “Search for a Specific Supplier” method is helpful when you want to obtain a quote from a specific supplier or suppliers. Users find the search by supplier name helpful to locate and include vendors they work with regularly. The search for a specific supplier requires you to know the name of the supplier you need. Enter the name in the ‘Supplier Name’ field and click the ‘Search’ button. If no data is available, it means that the supplier has not registered for eQuote or the name has not been entered properly.

If you discover that a supplier is not available, you can invite a supplier to register for eQuote using the ‘Invite Supplier’ button. When you click the ‘Invite Supplier’ button, another window displays requesting information such as the Supplier Name, Contact Name, Phone or Fax, or Email. The supplier will be contacted about this eQuote and given information about registering for NC E-Procurement and participating in eQuote. Suppliers who are not registered with NC E-Procurement and with eQuote will not be able to respond to current bids. This includes those suppliers that have been invited to register but have not completed the registration process.

Suppliers can also call the NC E-Procurement Help Desk at 1-888-211-7440 and select Option “2” (vendor). The Help Desk will assist the supplier with the eQuote registration process.

**Search for a list of suppliers:**
The “Search for a List of Suppliers” process is helpful when you do not know the suppliers that offer the product you need. A search for a list of suppliers is performed by selecting product characteristics from specific categories and subcategories. A search by category is useful when you do not know the name of the supplier but know the product you want to buy. This search also allows you to sort to quickly locate HUB and local vendors. Searching by category can provide a longer list of potential suppliers and, ultimately, better pricing options. You can execute several different searches to locate the suppliers by using different search categories. Once the category and two subcategories have been selected, click on the ‘Search’ button to view the list of suppliers.

It is important to remember to select the supplier(s) in order to add them to the list to receive your eQuote request. You can send the same eQuote to a maximum of twenty suppliers at one time.

**Scenario**

This scenario begins where we left off in the last classroom walkthrough. You are ready to add the suppliers to the eQuote that you created in the Topic 2 walkthrough for “Logo Shirts eQuote - 5/8/15.” This scenario builds on the walkthrough in the last topic. We are starting from the completed eQuote information page and continuing to the second step of creating an eQuote: selecting suppliers to receive the request for a quote.
Walkthrough: Selecting Suppliers

1. You have already completed the eQuote information fields and have scrolled down the page and clicked the ‘Continue’ button to move to the Select Suppliers step. The ‘Select Suppliers’ page displays.
Note: The steps on the header of the eQuote page now indicate that we are on ‘Step 2: Select Suppliers.’

2. In the ‘Supplier Name’ field, enter “NC Logowear.”

Note: This field is used to conduct a search by supplier name.

3. Click on the ‘Search’ button in the ‘Search for a Specific Supplier’ section. The Supplier record displays in the ‘Supplier Search Results’ section.
4. Scroll down the page and click the checkbox located next to the supplier name.

5. Click on the ‘Add To eQuote’ button in the ‘Supplier Search Results’ box.

**Note:** This adds the supplier to the list of recipients for this eQuote. This list is displayed in the ‘Suppliers Selected for eQuote’ section.

6. Click on the ‘Return To Search’ button at the bottom of the screen. The ‘Supplier Search’ fields display.
7. In the ‘Category Selection’ field, select “Apparel and Luggage and Personal Care Products.”

**Note:** The ‘Search for a List of Suppliers’ section is used to search by product type for additional suppliers to add to the eQuote. It is recommended that you add several suppliers for the best price options.

8. In the ‘Second Level Category’ field, select “Clothing.”

9. In the ‘Third Level Category’ field, select “Tshirts.”

**Note:** You must select first, second, and third level categories before searching for the supplier.

10. Click on the ‘Search’ button in the ‘Search for a List of Suppliers’ box. Your search results display. Scroll down the screen to review the search results in the ‘Supplier Search Results’ section.
Note: Supplier search results display in a column format. The columns contain the following information: supplier name, whether they are a HUB vendor, whether they offer rush responses, and the supplier’s City, State, and County. Users can sort by these columns by clicking the up and down arrows located next to the column heading.

11. Sort by the HUB indicator by clicking on the up and down arrows next to the ‘HUB’ header (You may need to click twice to see those vendors marked as ‘HUB’ at the top of your list).

Note: If you click on a supplier’s name, it is a link to the ‘Supplier Information Page.’ This information page is also called a marketing page. The suppliers create it when they set up their eQuote account.

12. Place a checkmark in the boxes next to “THE LOGO BOSS, LLC” and “TSC, Inc” to select the suppliers.

13. Click on the ‘Add To eQuote’ button to add “THE LOGO BOSS, LLC” and “TSC, Inc” to the list of suppliers for this eQuote. “THE LOGO BOSS, LLC” and “TSC, Inc” display in the ‘Suppliers Selected for eQuote’ section.
14. Click on the 'Invite Supplier' button at the bottom of the page to invite a supplier who is not yet registered in the system. The 'Invite Suppliers to Join the North Carolina E-Procurement Service' page displays.

**Note:** The invite supplier functionality should be used when a supplier cannot be located using the eQuote supplier search methods. Invited suppliers cannot respond to an existing or current quote. Suppliers can only respond to eQuotes once they have completed the eQuote registration process.
15. In the ‘Supplier Name’ field, enter “Bob’s Tees.”

16. In the ‘Contact Name’ field, enter “Bob Evans.”

17. In the ‘Phone’ field, enter “555-555-1212.”

18. In the ‘Fax’ field, enter “555-555-1213.”

**Note:** Although the ‘Fax’ field says “Optional,” the user must enter data into the ‘Phone’ field or the ‘Fax’ field.

19. In the ‘E-mail Address’ field, enter “bob.evans@bobtees.com.”

20. Click on the ‘Submit’ button at the bottom of the screen to close this window and return to the eQuote.
21. Click on the ‘Continue’ button at the bottom of the screen to proceed to the eQuote confirmation screen.
22. View the eQuote confirmation screen and click on the 'Submit' button at the bottom of the screen to send the eQuote to the three suppliers.

---

### eQuote Confirmation Screen

<table>
<thead>
<tr>
<th>Supplier SKU</th>
<th>Item Description</th>
<th>Qty</th>
<th>Unit</th>
<th>Classification</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Medium T-shirts, short sleeve, logo on left, Navy Blue</td>
<td>25</td>
<td>Each</td>
<td>Shirt</td>
</tr>
<tr>
<td></td>
<td>Medium T-shirts, long sleeve, logo on left, Navy Blue</td>
<td>30</td>
<td>Each</td>
<td>Shirt</td>
</tr>
<tr>
<td></td>
<td>Logo Design</td>
<td>1</td>
<td>Dollar</td>
<td>Service</td>
</tr>
</tbody>
</table>

**Terms & Conditions:** The State of North Carolina Terms and Conditions apply to the purchase. For more information, please refer to the T&Cs applicable to purchases of information technology. If you have any questions, please contact the purchaser.
Instructions:
Using the scenario below, complete the practice exercise. You will be practicing the steps you just learned to add suppliers to an eQuote. Use the steps following this section to help guide you through the process in the practice example.

Scenario:
In order to complete this practice exercise, we are going to return to the “Adding Items” practice exercise scenario for computer monitors. In the previous practice exercise, we added the items to the eQuote. In this practice exercise, we need to add the suppliers.

First, conduct a search by supplier name for “A/V Solutions” then add the supplier to your eQuote. Next, conduct a search by category for “Information Technology Broadcasting and Telecommunications,” with sub-category searches for “Computer Equipment and Accessories” and “Computer displays.” Once you have executed this search, add “JCS Technology” and “Enterprise Network Services” to the eQuote. You should now have a total of 3 suppliers on the eQuote.

Once you have your list of suppliers, view the confirmation details screen and submit the eQuote.
Practice: Selecting Suppliers

1. In the ‘Supplier Name’ field, enter “A/V Solutions.”

2. Click the ‘Search’ button. The ‘Search for a List of Suppliers’ page displays. Scroll down the page to view the supplier in the ‘Supplier Search Results’.
3. Click the checkbox next to your supplier selection.

4. Click on the ‘Add To eQuote’ button in the ‘Supplier Search Results’ box. The supplier is added to the ‘Suppliers Selected for eQuote’ section.

5. Click on the ‘Return to Search’ button at the bottom of the page. The ‘Step 2: Select Suppliers’ page displays.
6. In the ‘Category Selection’ field, select “Information Technology Broadcasting and Telecommunications.”

7. In the ‘Second Level Category’ field, select “Computer Equipment and Accessories.”

8. In the ‘Third Level Category’ field, select “Computer displays.”

9. Click on the ‘Search’ button in the ‘Search for a List of Suppliers’ box. The search results display.
10. Sort by the County indicator by clicking on the up and down arrows next to the ‘County’ header.

11. Place a checkmark in the boxes next to “JCS Technology” and “Enterprise Network Services.”

12. Click on the ‘Add To eQuote’ button to add “JCS Technology” and “Enterprise Network Services” to the eQuote. The selected suppliers display in the ‘Suppliers Selected for eQuote’ section located at the bottom of the page.
13. Click the ‘Continue’ button at the bottom of the screen to proceed to the eQuote confirmation screen.
14. Review the eQuote confirmation page and click on the ‘Submit’ button at the bottom of the screen to send the eQuote to the three suppliers.

```
<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Qty</th>
<th>Unit</th>
<th>Supplier ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>LCD Monitor, 20 in. HDMI input</td>
<td>10</td>
<td>Each</td>
<td>Good</td>
<td></td>
</tr>
<tr>
<td>HDBs cables, 12 ft</td>
<td>10</td>
<td>Each</td>
<td>Good</td>
<td></td>
</tr>
</tbody>
</table>
```

**Instructions:**
- Review your work to make sure all of the information is correct and then click on Submit at the bottom of the page. To make changes, click on Edit.

**Overview**
- Initiator: [Department of Administration]
- Date Initiated: Apr 8, 2015 13:59
- Item Title: 
- Item Description: 
- Item Quantity: 10
- Item Unit: Each
- Item Classification: Good

**Specifications**
- Additional Information: Must be able to adjust the height of the monitor
- Substitute Product: No
- Attachment: No
- Terms & Conditions: The State of North Carolina Terms and Conditions (T&Cs) apply to this purchase. Click here [Disclosures & Terms](#) for the T&Cs applicable to purchases of information technology. Click here [Disclosures & Terms](#) for instructions for Quote and T&Cs applicable to all other purchases. No additional T&Cs that may be attached to your responses to the eQuote will be considered. You are required to submit an offer using your password-protected access to this system to constitute an approved offer.

**External Notes**
- Notes: Please only quote HDMI cables available in black. Contact 636-651-1294 with any questions.

**Internal Notes**
- Notes: No notes entered
- Notes: Members are for computer lab

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Optional – Summary Exercise  

Create an eQuote

**Instructions:**
Using the scenario below, perform the practice exercise. Please feel free to consult the contents of the course as well as classmates if you need help completing the exercise.

**Scenario:**
You are looking for new LCD projectors that you need by April 30th for presentations at the conferences you and your team will be attending this summer. You need a response to this eQuote by April 9th.

At the maximum your team will be attending 3 simultaneous conferences, so you’ll need 3 new projectors. You see that Professional Video sells other types of projectors, so you think they may have LCD projectors as well. Create a title that reflects the item you need and add an item description to the eQuote.

When you reach the ‘Select Supplier’ screen, conduct a search for “Professional Video,” since you think they may have the projectors you are looking for. When the search results display, add “Professional Video” to your eQuote. Continue searching by category using “Printing and Photographic and Audio and Visual Equipment and Supplies” as the First Level category and “Audio and visual presentation and composing equipment” and “Projectors and supplies” as the two subcategories.

View the supplier search results. Select “KENNEDY OFFICE SUPPLY, INC.” and “RTS Technology” and add them to your eQuote. Your eQuote will be sent to 3 different suppliers. Continue onto the next screen and submit your eQuote.
Optional – Summary Exercise: Creating an eQuote

1. Click the ‘eRequisition’ link in the ‘Common Actions’ Portlet, or click ‘Create’ on the Menu Bar and then select ‘eRequisition.’
2. Enter ‘eQuote’ in the search field.

3. Click the ‘Search’ button to search for the eQuote site.
4. In the green ‘Supplier Punchout Catalog Resources’ box, click the ‘eQuote Punchout Site’ link to punch out to the eQuote site.

5. The eQuote punchout site will open on the ‘Create eQuote’ page.
6. In the ‘eQuote Title’ field, enter “LCD Projectors eQuote.”

7. Note that the ‘eQuote Response Due’ field defaulted to “April 9, 2015.”

8. In the ‘Delivery Needed By’ field, select “April 30, 2015.”

9. In the ‘How many items would you like to display?’ field, enter “1.”

10. Click on the ‘Display’ button to create a line item in the eQuote.
11. In the ‘Item Description’ field, enter “LCD projector, 3,000 Lumens, carrying case included, 2-year warranty.”

12. In the ‘Qty’ field, enter “3.”

13. Click on the ‘Finish Item Edits’ button.
14. In the ‘Additional Information’ field, enter “Does not have to be able to be ceiling mounted, table-top is fine.”

15. Scroll down to the ‘External Notes’ field and enter “Please only quote projectors that are Wi-Fi enabled. Please contact at 919-555-1234 with any questions.”

**Note**: It is helpful to enter your name and your phone number and/or your email for the suppliers to contact you if they have any questions.

16. In the ‘Internal Notes’ field, enter “Projectors are for classrooms and presentations at summer conferences.”

17. Click on the ‘Continue’ button.
18. In the ‘Supplier Name’ field, enter “Professional Video.”

19. Click on the ‘Search’ button. The search results display.
20. Scroll down to the ‘Supplier Search Results’ section and click on the checkbox next to “Professional Video” to select the supplier.

21. Click on the ‘Add To eQuote’ button.

22. Click on the ‘Return To Search’ button. The ‘Select Suppliers’ page displays.
23. In the ‘Category Selection’ field, select “Printing and Photographic and Audio and Visual Equipment and Supplies.”

24. In the ‘Second Level Category’ field, select “Audio and visual presentation and composing equipment.”

25. In the ‘Third Level Category’ field, select “Projectors and supplies.”

26. Click on the ‘Search’ button in the ‘Search for a List of Suppliers’ box. The search results display.
27. Sort by the HUB indicator by clicking on the up and down arrows next to the ‘HUB’ header.

28. Place a checkmark in the boxes next to “KENNEDY OFFICE SUPPLY, INC.” and “RTS Technology.”

29. Click on the ‘Add To eQuote’ button to add “KENNEDY OFFICE SUPPLY, INC.” and “RTS Technology” to the eQuote. The selected suppliers display in the ‘Suppliers Selected for eQuote’ section of the page.
30. Click the ‘Continue’ button to proceed to the eQuote confirmation screen.
31. View the eQuote confirmation screen and click on the ‘Submit’ button to send the eQuote to the three suppliers.

Key Summary Points

- Users can search for a supplier by name or by using the category and sub-category search by product type.

- From a category, sub-category, and third category of suppliers, the user can retrieve a listing of suppliers from which to select the eQuote recipients.

- Users must select the suppliers they wish to receive the eQuote and click the ‘Add To eQuote’ button.
View, Evaluate, and Award eQuote Responses

Overview

Once the eQuote has been created and submitted, suppliers can begin responding electronically to your request. Users can view the suppliers' responses by re-opening the eRequisition that contains the eQuote line item.

In order to review the status of your eQuote, open the eRequisition and click on the 'Edit' button. The ‘Line Item Details’ page displays, allowing the user to view the number of suppliers that have currently responded to the eQuote. The ‘Refresh’ button below the line item allows the user to see the latest number of responses.

Once the status indicates that a response has arrived, it is easy to access and review the supplier’s information. Simply click on the line item description to display a summary of all suppliers' responses. For more detailed response information, users can review each supplier's response individually by clicking the ‘View’ button next to the supplier's name. A detailed response page displays information including an overview, supplier contract, items, response details, and external and internal history.

Suppliers are able to use symbols in their responses to convey more information about their products. The screen shot below contains the symbols you may see when reviewing suppliers’ responses.

Although many of these icons are self-explanatory, a few may be new to you:

- The ‘Non-Cherrypickable’ icon means that the items described in the eQuote are only available at the price quoted if all of the items are purchased. Individual items cannot be “cherrypicked,” or purchased separately.
- A “Substitution” occurs when the supplier does not quote the item you requested, but instead offers a similar but different item. The number of substitutions is indicated on the eQuote response page in the ‘Number of Substitutions’ column (not shown here). Substitutions are also noted by a blue ‘Sub’ link when a user tabulates the supplier responses.
- An ‘Alternative Item’ icon displays when the supplier quotes the item you requested, and offers a similar item as an alternate choice.
When evaluating the supplier responses, it is important to check if the price quoted includes shipping costs. View the ‘Shipping’ column on the eQuote response page to see if the price includes the shipping costs. You can sort the supplier response columns by shipping to easily determine which suppliers have included shipping in their costs. In order to see more information about the shipping cost, click on the ‘View’ button and review the details in the supplier’s response. You can also sort the columns by price to see which supplier provided the lowest price on the item.

eQuote contains a tabulate feature which allows users to tabulate and view all suppliers’ prices by item with a click of a button. The tabulate feature makes it easy for users to review and compare prices.

We will walk through the steps to view and evaluate eQuote responses in this topic.

Scenario

This scenario begins where we left off in the previous classroom walkthrough. A few days ago you started an eRequisition for T-Shirts. You are now ready to review and evaluate the supplier responses from the walkthrough example. Tabulate the responses in order to locate the best price.
Walkthrough: Awarding an eQuote

1. Note the number of supplier responses located next to the ‘eQuote Status’.

2. Click on the ‘Refresh’ button to view how many responses you have received. The ‘eQuote Status’ is refreshed.
Note: If the accounting information has not been entered, an error message will appear. This will not affect the eQuote awarding process.

3. Click on the ‘Line Item Description’ for “Logo Shirts eQuote” to view responses. The eQuote responses display on the ‘Response Summary’ page.

Note: Notice that the ‘eQuote Status’ field now lists 3 of 3 responses.
4. Click the ‘View’ button next to “NC Logowear” to view the entire response from NC Logowear.

Note: The ‘eQuote Response Summary’ page contains a summary of the supplier responses. The ‘eQuote Responses’ section displays: the date received, number of items responded to, number of substitutions, details, shipping information and the total price quoted for the item(s) by supplier.
5. Review the fields on the ‘Review eQuote Response’ page.

6. Click on the ‘Return To Summary’ button at the bottom of the screen to go back to the ‘eQuote Response Summary’ screen. The ‘eQuote Response Summary’ page displays.
7. Click in the check boxes next to all supplier responses except for the declined response.

**Note**: If a supplier elects not to provide you with a quote for any of your requests, it will be indicated by a ‘Declined’ in the ‘Items Responded To’ column.

8. Click on the ‘Tabulate Selected’ button to tabulate supplier responses. The tabulated responses display.
Note: Tabulating the suppliers’ responses allows the user to see the price quoted for each item by supplier name.

Note: You can use the up and down arrow buttons to sort the columns by price.

9. Click on the ‘Sub’ link in the first row to view the substitute line item from the supplier, NC Logowear. The substitution description displays.

Note: Substitutions will always be noted with the ‘Sub’ link. This allows the user to distinguish prices by actual item and substituted item.
10. Review the substitution description.

11. Click on the ‘Close’ button to return to the ‘Response Tabulation’ screen.
12. Check each of the item checkboxes in the “TSC, Inc” response to award the eQuote.

**Note:** You can select items from different suppliers when "Cherrypicking" is not prohibited, however, the eRequisition will split into two or more purchase orders.

13. Click on the ‘Add To eRequisition’ button at the bottom of the screen to add these items to the eRequisition. The eRequisition ‘Line Item Details’ page displays.
Note: Notice you have now returned to the original eRequisition and the items you selected in the eQuote are displayed as line items on the eRequisition.

14. Review the eQuote line items.

Note: It is important to update the commodity code and accounting information, if applicable, as well as select the appropriate supplier location for eQuote items. Users can update this information by clicking on the ‘Edit’ button for each line item.

15. Click on the button to continue.
Practice Exercise

Awarding an eQuote

Instructions:
Using the scenario below, complete the practice exercise. You will be practicing the steps you just learned to add suppliers to an eQuote. Use the steps following this section to help guide you through the process.

Scenario:
A few days ago you started an eRequisition and sent an eQuote request to suppliers for some computer monitors. You have now received responses from the 3 suppliers and are ready to review them.

View and tabulate the responses (except the one in which the supplier declined). Select the lowest priced items and view the awarded supplier and items in the eRequisition.
Practice: Awarding an eQuote

1. Click on the eRequisition title “LCD Projectors eQuote - 4/10/15” to view responses.

Note: Under the title of the line item, the ‘eQuote Status’ indicates that 3 of 3 responses were received. If the current number of responses to your eQuote are not displayed, you could click on the ‘Refresh’ button to update the ‘eQuote Status’ field.
2. Click on the ‘View’ button next to “A/V Solutions” to view the entire supplier response. The ‘Review eQuote Response’ page displays.
3. Review the supplier response fields.

4. Click on the ‘Return To Summary’ button at the bottom of the screen. The ‘Response Summary’ screen displays.
5. Click the checkboxes next to all supplier responses except for the declined response.

6. Click on the ‘Tabulate Selected’ button to tabulate supplier responses.
7. Check each of the item checkboxes in the “A/V Solutions” response to award the eQuote.

8. Click the ‘Add To eRequisition’ button to return these items to the original eRequisition. The ‘View Line Item’ page displays.
9. Review the eQuote line items that are now added on the eRequisition.

**Note:** Once you have added the eQuote line item, it is important to add commodity code and accounting information, if applicable, to the eRequisition for each line item. Click the ‘Edit’ button located next to the line item to update these fields.

10. Click the button to complete the practice exercise.

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**Key Summary Points**

- To access supplier responses to an eQuote, the user must locate and open the eRequisition containing the eQuote. The user must click the ‘Edit’ button to view the responses.

- It is possible to view the number of responses returned from the suppliers without going into the eQuote. To view the number of responses, click the ‘Refresh’ button at the bottom of the ‘Line Items’ section.

- The tabulate feature allows users to easily compare prices across each item.

- Substitutes are tabulated the same way as exact item matches.