The NC E-Procurement eQuote tool allows users to request pricing on goods and services from one or more suppliers quickly and efficiently. eQuote functions much like a punchout session in NC E-Procurement (see the **'eRequisition Punchout Item'** job aid for more information about punchout catalogs), allowing buyers to access the site without the need for additional login information. Suppliers submit their quotes through the same eQuote tool, creating an electronic audit trail. Once a buyer has awarded items on the eQuote website, the items are automatically transferred into NC E-Procurement as line items on the eRequisition.

I. Creating eQuote Items

1. Conduct a catalog search for the eQuote punchout site. Under the **'Search'** Portlet, select **'Catalog'** and enter the word **'eQuote'** to search for the eQuote site. Alternatively, select **'Catalog'** from the **'Search'** drop-down menu of the Command Bar and enter **'eQuote'** in the **'Search'** field.

2. 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.

3. The eQuote punchout site will open on the **'Create eQuote'** page.

4. Update the information in the **'Overview'** section.

   a. The **'Initiator,' 'Date Initiated,' 'Your Requisition Number,'** and **'Ship To Address'** fields will automatically populate based on your user profile information.

   b. The **'eQuote Title'** field will automatically populate based on the eRequisition title. If you did not add a title to the eRequisition before creating the eQuote item, the title will default to **'Untitled Requisition.'** The **'Quote Title'** field is editable on the **'Create eQuote'** page.

   c. Set the **'eQuote Response Due,' 'FOB,'** and **'Delivery Needed By'** fields as applicable.

Note: The **'Rush Response'** box may be checked to notify vendors that a response is needed within 4 business hours. The **'Rush Delivery'** box may be checked to notify vendors that delivery will be required within 2 business days.
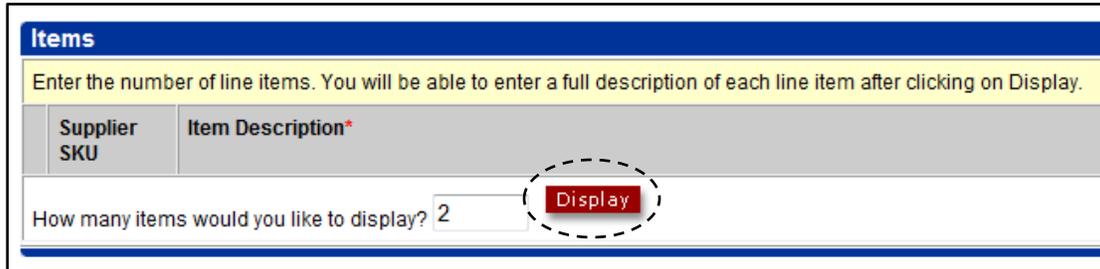

Note: Everything but the **'Your Requisition Number'** field will be visible to the supplier.

5. In the **'Items'** section, enter the number of items for which you wish to request quotes in the **'How many items would you like to display?'** free-text field and then click the **'Display'** button.

6. The page will update with the number of items requested. If further items are needed, click the **'Add Item'** button to add more items.

    a. Enter the part number (if known) into the **'Supplier SKU'** free-text field. If unknown, leave the field blank as this is an optional field.

    b. Enter a description of the requested good or service in **'Item Description'** free-text field. Be sure to include as many details as possible to aid the supplier in determining their response.

    c. Set the quantity in the **'Qty'** free-text field and set a unit of measure using the **'Unit'** drop-down menu.

    d. Select either the **'Good'** or **'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 **'Quantity,' 'Price,'** and **'Unit of Measure'** fields on the eRequisition. Do not complete the **'Supplier SKU'** field for a service item.

7. Click **'Finish Item Edits'** to save the item information.

8. If you wish to delete an item, check the box next to the item and click the **'Delete'** button.

9. Once the **'Finish Item Edits'** button has been clicked, the item information will be saved and the items will appear as uneditable. To make edits to existing items, check the box next to the item and click the **'Make Edits'** button. Items can also be added and deleted at this point.

Items

To make additional changes click on Make Edits.

	Supplier SKU	Item Description*		Qty*	Unit
☐	1234	Good Item	Check the box and click the **'Make Edits'** button to edit existing items.	10	Each
2 ☐		Service Item		1	Dollar

Delete   Add Item   Make Edits

10. After adding items, continue to the **'Specifications'** section. Details under this section are optional.

a. Enter any further specifications, shipping instructions, invoice requirements, etc. into the **'Additional Information'** free-text field.

b. Use the **'Substitute Products'** radio buttons to set whether suppliers will be able to offer substitutes to the requested items.

c. Click the **'Browse'** button, select a file saved on the local computer, and click **'Attach File'** to add any attachments.

d. The standard State of North Carolina eQuote Terms and Conditions will appear in the **'Terms & Conditions'** section. If your agency has further quoting terms and conditions, enter those in the free-text box at the bottom of the section.

Specifications

Additional Information Use this space for product specifications and other requirements.	[free-text field] — Additional specifications and other comments may be entered in the **'Additional Information'** free-text field.
Substitute Products Will you consider equal quality substitute products?	⦿ Yes ○ No
Attachments To attach a file, first click on the Browse button and navigate your hard drive to select the file. Then, click the Attach button. You can attach up to 2 files, with a size of 1.5MB or less each.	[ ] Browse... Attach File No attachments
Terms & Conditions	The State of North Carolina Terms and Conditions (T&Cs) apply to this purchase. Click here [Statewide IT Procurement] for the T&Cs applicable to purchases of information technology. Click here [Purchase and Contract] for Instructions for Quote and T&Cs applicable to all other purchases. No additional T&Cs that may be attached to your response to the eQuote will be considered. You agree that your submission of an offer using your password protected access to this system constitutes an approved signature on your offer. Please contact the purchaser if you have questions.

Enter additional terms and conditions for your agency here.

11. The **'External Notes'** section can be used to enter any additional notes to the suppliers, such as contact information regarding questions about the eQuote request. This section is optional.

12. The **'Internal Notes'** section will not be visible to the suppliers and may be used to track internal information for the agency. This section is optional.

13. Click the **'Continue'** button to continue to the next page and select suppliers to which the request should be sent.
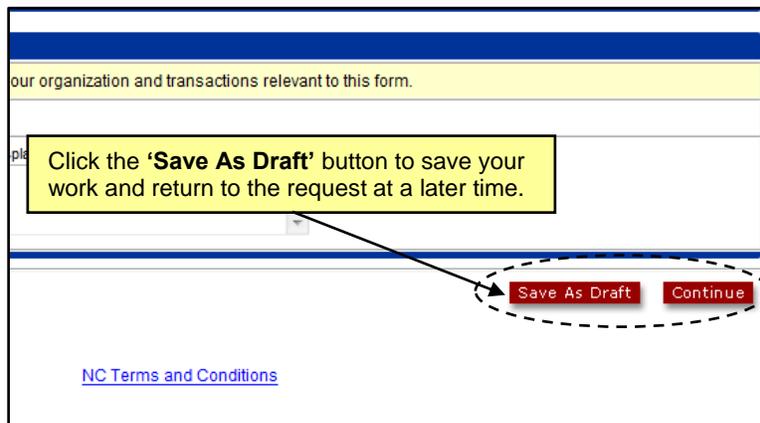
Note: At the bottom-right of the page, click the **'Save As Draft'** button at any time to save the information and return to the eRequisition. Once back in the requisition, click the underlined line item description of the saved eQuote request to punch back out to eQuote and continue working on the request. Saving the draft will not send the request to any suppliers.

14. The **'Create eQuote: Select Suppliers'** page will appear.

15. If the supplier from which you would like to request a quote is known, enter the supplier's name in the **'Supplier Name'** free-text field and then click the **'Search'** button.

16. To search for a list of suppliers that provide the types of items or services needed, use the category drop-down menus in the **'Search for a List of Suppliers'** section to select the applicable categories. Suppliers will be returned based on the options configured in their eQuote profiles.

Note: If a rush response is needed, check the **'Rush Response'** box before clicking the **'Search'** button. This returns only those suppliers who have indicated that they will provide rush responses.

17. Suppliers matching the search criteria will appear in the **'Supplier Search Results'** section. Check the box next to the suppliers to whom the request should be sent and click the **'Add to eQuote'** box.

Supplier Search Results

Please select the suppliers that you would like to respond to your eQuote request by clicking in the check box. Click on Add to eQuote before clicking on Continue. You can also invite a supplier you don't see listed to join the marketplace.

	Name		HUB	Rush Response	City	State	County
☑	Test Vendor		☑		Raleigh	NC	Alleghany

Add To eQuote   Invite Supplier

Items **1-1 of 1**. Page 1 ▾ of 1   Display: 20 items ▾

Click **'Invite Supplier'** to ask a supplier to register for eQuote to be available for future eQuote requests.

Suppliers Selected for eQuote

Suppliers selected to receive this eQuote are listed below. To add ~~more suppliers and~~ add them to the list by clicking in the check box. Click on Add to eQuote before clicking on Continue. To remove a supplier, click in the box to the left of the supplier's name and then click on Delete. To remove all selected suppliers from this eQuote, click the Delete All button.

	Name	HUB	Rush Response	City	State	County
		No Data Available				

Delete All   Delete

Items **1-0 of 0**

Return To Search   Save As Draft   Continue

NC Terms and Conditions

Internet | Protected Mode: On   🔍 ▾   🔍 100% ▾

Note: If there is a preferred supplier that does not appear to be registered for eQuote, click the **'Invite Supplier'** box to send the supplier information on enrolling in NC E-Procurement and participating in eQuote. Enter the supplier's contact information on the **'Invite Suppliers to Join the North Carolina E-Procurement Service'** page and click the **'Submit'** button. Unless an invited supplier registers for eQuote and is manually added to the eQuote request prior to submitting, they will not be able to respond to the current request.

Invite Suppliers To Join the North Carolina E-Procurement Service

If you have a supplier who is not currently registered to receive eQuotes, please tell us about your supplier using the form below. The supplier will be contacted with information about enrolling in the NC E-Procurement Service and participating in eQuote. Please supply a valid email address in addition to the other required information.

Supplier Name*	
Contact Name*	
Phone*	
FAX (Optional)	
E-mail Address (*Required)	

Cancel   Submit

18. After selecting a supplier(s) and clicking the **'Add to eQuote'** button, the selected supplier(s) will appear in the **'Suppliers Selected for eQuote'** section. Once all desired suppliers are added, click the **'Continue'** button.

19. The **'Create eQuote – Review and Submit'** page will appear.

20. Review the information and click the **'Edit'** button to make any desired updates before submitting the request to the selected suppliers.

21. Click the **'Submit'** button to send the request to the suppliers and punch back into the eRequisition.

Note: Once the eQuote request has been submitted to suppliers, it cannot be edited.

Specifications	
Additional Information	
Substitute Products	Yes
Attachments	No attachments
Terms & Conditions	The State of North Carolina Terms and Conditions (T&Cs) apply to this purchase. Click here [Statewide IT Procurement] for the T&Cs applicable to purchases of information technology. Click here [Purchase and Contract] for Instructions for Quote and T&Cs applicable to all other purchases. No additional T&Cs that may be attached to your response to the eQuote will be considered. You agree that your submission of an offer using your password protected access to this system constitutes an approved signature on your offer. Please contact the purchaser if you have questions.
Selected Supplier(s)	Test Vendor ← Note the selected suppliers.

External Notes	
Notes	

Internal Notes	
Log	No notes entered
Notes	

Click the **'Edit'** button to go back and make updates to the request before sending it to the suppliers. → Edit   Save As Draft   Submit

NC Terms and Conditions

22. Once submitted, the eQuote line item will be added to the eRequisition. Save the eRequisition and return to it after the eQuote due date (set earlier in the **'eQuote Response Due'** field) to award the eQuote.

Note: The system does not prevent suppliers from submitting responses once the due date has passed. Therefore, it is the responsibility of the buyer to award the eQuote in a timely manner.

II. Awarding eQuotes

1. After the **'eQuote Response Due'** date has passed, click the underlined line item **'Description'** to punch out to the eQuote request.

   Note: If the **'eQuote Status'** field shows that 0 responses have been received, click the **'Refresh'** button to update the field with the latest information.

2. The **'eQuote Response Summary'** page will appear.

Note: The **'Details'** field may have icons related to the supplier's response. The descriptions of those icons are located in the shaded legend above the responses.

    a. To summarily award the entire eQuote to one supplier, check the box next to the supplier and click the **'Add to eRequisition'** button.

    b. To see a tabulation of specific responses for comparison, check the boxes next to the responses to be reviewed and click the **'Tabulate Selected'** button.

    c. Click the **'View'** button to review the supplier's specific quotes for each line item.

eQuote Response Summary

Use the legend to understand any icons that appear in the **'Details'** field.

Description

Initiator	
eQuote Title	Untitled Requisition
Date Sent	Dec 13, 2012
Response Due	Dec 19, 2012

Click **'View'** to see specifics for each line item.

eQuote Responses

The symbols below refer to information suppliers included in their responses. Click on View to look at the response. Tabulate your eQuotes by clicking in the check box and then click on Tabulate Selected. You may add a checked response to eRequisition where applicable.
Note: A **Substitution** occurs when the supplier does not quote the item you requested, but instead offers a different item. An **Alternate** occurs when the supplier quotes the item you requested, **and** offers a similar item as an alternate choice.

ℹ Additional Response Information	📑 Terms and Conditions	🎲 Alternate Item
➕ Add On Products	🌶 Non-Cherrypickable	📎 Include Attachments

	View Response	Supplier Name ⬍	Received ⬍	Items Responded To ⬍	Number of Substitutions ⬍	Details	Shipping ⬍	Price of Requested and Substitute Items ⬍
☑	View	Test Vendor	Dec 13, 2012 5:19PM	2 of 2	0 of 2		Not included	200.00

Tabulate Selected ☑ Include Alternates in tabulation

Use the **'Tabulate Selected'** button to review a tabulation of all responses.

Add To eRequisition

d. While viewing the tabulated responses or a specific supplier's response, it is possible to award specific line items to a supplier by checking the box next to the line item and then clicking the **'Add to eRequisition'** button. This allows users to award separate line items to multiple vendors.

Note: This option is available only if the **'Non-Cherrypickable'** icon does **not** appear in the **'Details'** section of the vendor's response. The icon represents that the supplier has indicated that they will only accept the award if all line items are awarded.

e. Click the **'Printable Version'** button to see a text-based version of the response(s) in a pop-up window, which is formatted to print easily.

f. Click the **'Return to Previous'** button to return to the **'eQuote Response Summary'** page.
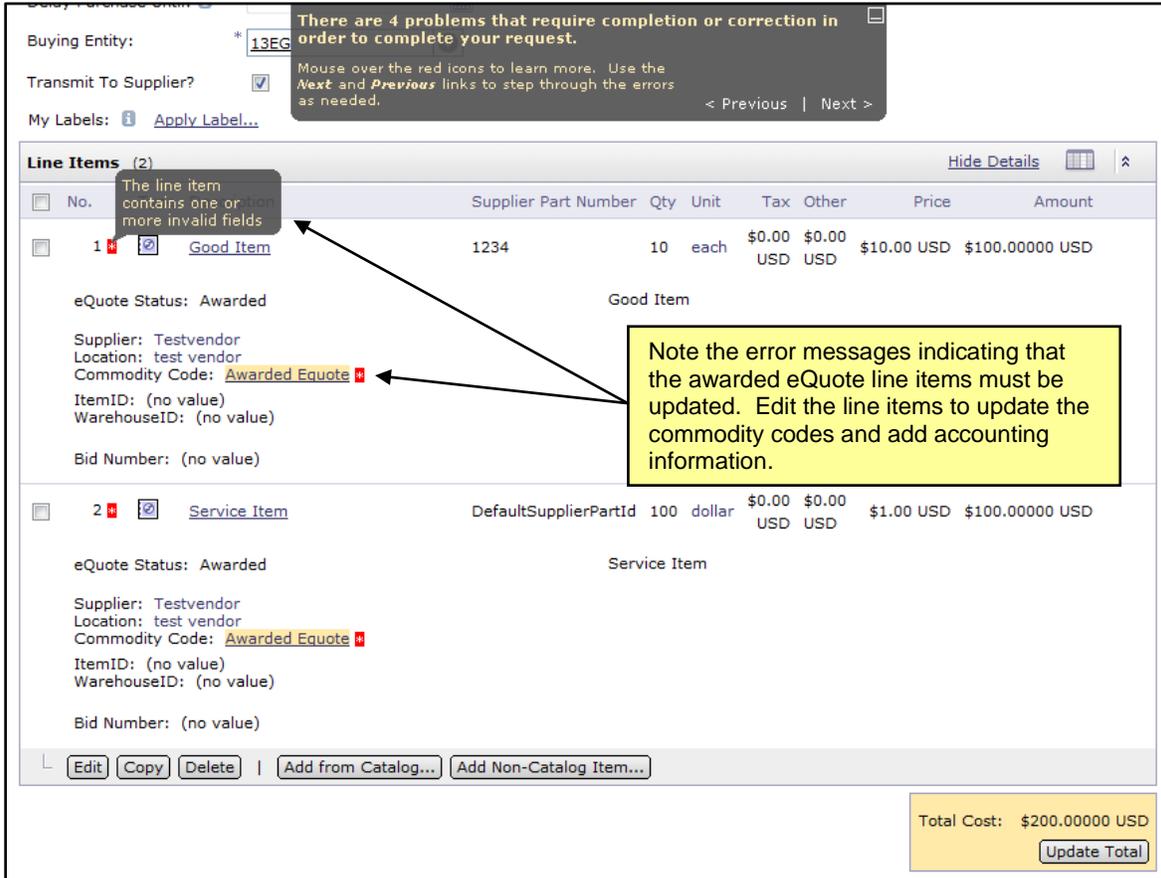
eQuote Response Tabulation

Description

Initiator	
eQuote Title	Untitled Requisition
Date Sent	Dec 13, 2012
Response Due	Dec 19, 2012

Use the check boxes to award specific items to a supplier.

Items

To select an item, click in the box to the left of the price. You may then add the item(s) to eRequisition where applicable. Click View to look at the supplier eQuote response individually. Click the sub and alt links next to the item price to see the supplier's item description. Note: A **Substitution** occurs when the supplier does not quote the item you requested, but instead offers a different item. An **Alternate** occurs when the supplier quotes the item you requested **and** offers a similar item as an alternate choice.

View Response	Supplier Name	Shipping	Items 1 - 2 of 2	
			Good Item 10 Each	Service Item 1 Dollar
View	Test Vendor	Not included	$10.00	$100.00

Return To Previous   Add To eRequisition   Printable Version

3. Once the **'Add to eRequisition'** button has been clicked, the items will import into the eRequisition. Edit the line items to add commodity codes and accounting information before submitting the requisition.

Note: The awarded suppliers may be changed at any time before the eRequisition is fully approved by editing the requisition and punching back out to eQuote.

Note: Once the eRequisition has been fully approved and the purchase order has been sent to the supplier(s), all suppliers who received the original request will also receive an email with the bid tabulation, regardless of whether they responded or declined to respond.

Note: The eQuote bid tabulation remains linked to the eRequisition after it has been awarded. The responses can be viewed at any time for reference or audit purposes.