

# Creating and Awarding Quick Quotes in OhioBuys

For agency users responsible for creating, updating, submitting, and reviewing quick quotes in OhioBuys.

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v:13.0



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## Introduction

**Overview:** A quick quote is a standardized, simplified solicitation process that encourages competition and standardization. A quick quote needs to be completed in OhioBuys whenever a line item in a purchase requisition references a State Term Schedule (STS) contract or contains over \$5,000 in non-catalog items for a Supplier.

This learner guide covers the activities related to creating a quick quote in OhioBuys, identifying and inviting Bidders and/or Suppliers, reviewing and comparing quotes, making awards, and updating associated purchase requisitions.

- Agencies that have adopted OhioBuys and are using it in the manner prescribed by State of Ohio Administrative Policy: Purchasing Procedures (PM-01) are not required to submit requests to the Controlling Board when a minimum three or more quotes or proposals is not obtained when purchasing from an STS Contract. Instead agencies must invite multiple suppliers to the solicitation.
  - State agencies not using OhioBuys in the manner prescribed in PM-01 shall continue to obtain a minimum of three quotes or proposals.
  - 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.
  - Any quick quote that is being created and linked to a requisition must be awarded in OhioBuys.
- Agencies are encouraged to rely upon the items in the item grid as the official proposal from the supplier, instead of any quotes (e.g., PDFs) that may also be attached along with their proposal. Doing so eliminates the risk of confusion when the proposal in the item grid and the PDF quote don't contain the same pricing, or when attachments list other terms and conditions that conflict with those governing the solicitation (e.g., shipping charges).
  - Agencies should consider including language such as "Completion of the grid is required and will be considered the response for evaluation. No outside/additional documentation will be considered." in the Process field of solicitations, when it's applicable.
  - If a PDF quote is attached, agencies must review it to ensure it is consistent with the terms and conditions governing the solicitation. If there are any inconsistencies, the agency must conduct a clarification to obtain an updated copy of the quote.
  - Suppliers have to agree to the following before they are able to submit a bid:

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 and conditions of the solicitation will apply in addition to the State Standard Terms and Conditions linked below. If there is a conflict between the terms and conditions in the solicitation and the State Standard Terms and Conditions, the solicitation controls.
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.

**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 OhioBuys Public Portal where additional Bidders / Suppliers can see and respond to the request.
- 5) **Analyze and Award:** At the close of the bidding period, OhioBuys 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

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### Topics

- Create a Quick Quote Solicitation
- Identify Bidders and Suppliers for a Quick Quote
- Release a Quick Quote Solicitation
  - [Link to Post a Solicitation](#)
- Cancel a Solicitation



## OhioBuys Creating a Quick Quote Solicitation

Updated: 09/04/2024 07:47 PM

Version: 13.0

### 📌 Purpose & Profiles

This job aid covers the process for creating a new quick quote solicitation.

**Profiles:** Requisitioners, Requesters (with the Quick Quote Procurement User profile)

### 📖 Used When

Reference this when creating a new quick quote.

#### ▲ Note

Agencies that have adopted OhioBuys and are using it in the manner prescribed by State of Ohio Administrative Policy: Purchasing Procedures (PM-01) are not required to submit requests to the Controlling Board when a minimum three or more quotes or proposals is not obtained when purchasing from an STS Contract.

State agencies not using OhioBuys in the manner prescribed in PM-01 shall continue to obtain a minimum of three quotes or proposals.

#### **DOT Note**

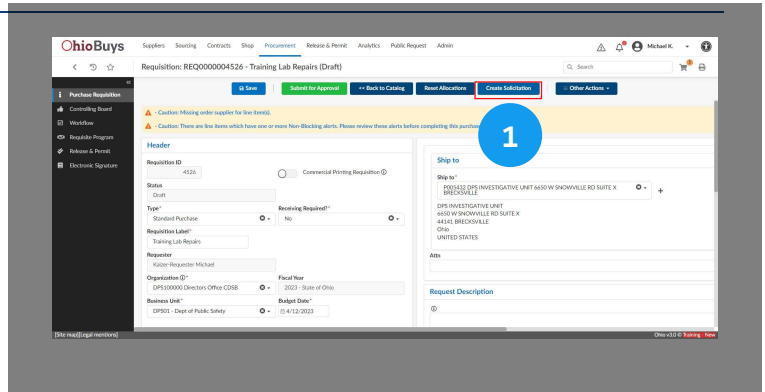
When DOT users create a purchase requisition that requires a quote, there are certain situations where it is appropriate to create a quick quote, and others where it is appropriate to create a request for quote (RFQ) in OhioBuys.

- **RFQ** solicitations should be created when purchasing non-contract items that require quotes in OhioBuys in order to meet all State requirements for electronic agency competitive selection. Please work with the appropriate Contract Analyst to conduct an RFQ solicitation and get a contract created for this purchasing need.
- **Quick quote** solicitations should be created when purchasing items from existing contracts or catalogs that require quotes in OhioBuys. (e.g., STS Contracts, Competitive Two Phase Contracts)

## Create Solicitation

1. Open the purchase requisition for which you would like to create a quick quote solicitation and click **Create Solicitation**.

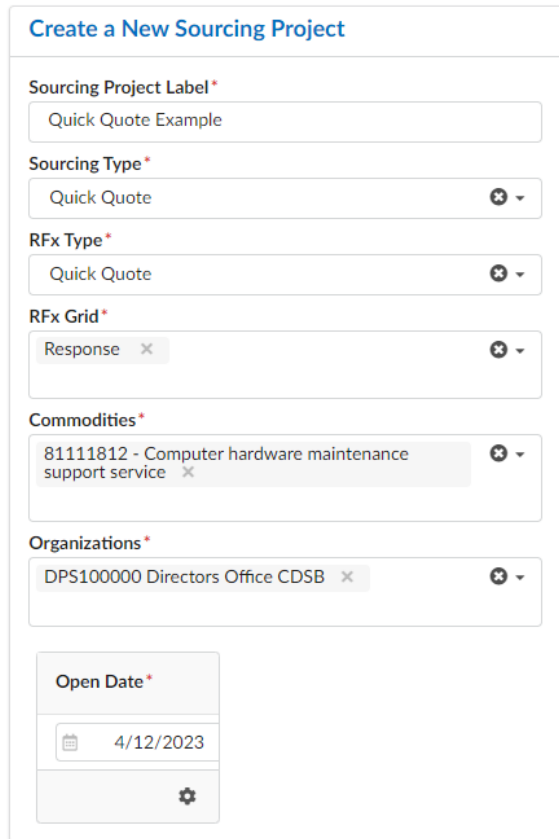
Note that the purchase requisition must be in either Draft, Initialized, or Requisitioner Approval status.



### ▲ Note

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.

## Create a New Sourcing Project



**Create a New Sourcing Project**

**Sourcing Project Label\***  
Quick Quote Example

**Sourcing Type\***  
Quick Quote

**RFX Type\***  
Quick Quote

**RFX Grid\***  
Response

**Commodities\***  
81111812 - Computer hardware maintenance support service

**Organizations\***  
DPS100000 Directors Office CDSB

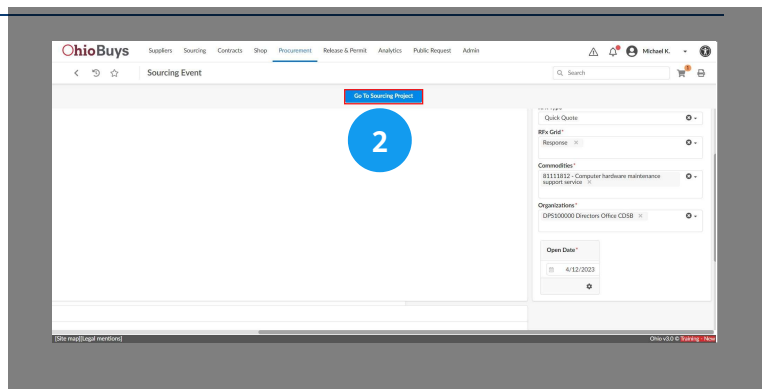
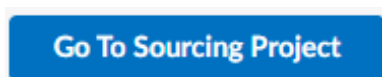
**Open Date\***  
4/12/2023

The associated line item information from the purchase requisition will be automatically carried over into the item grid of a new quick quote solicitation (Supplier, Item Description, UOM, Price, Quantity). You can edit these details prior to releasing the quick quote solicitation for responses. From this page:

- Enter the **Sourcing Project Label**, which should be a short description of what the quick quote solicitation is for. By default, this field will populate with the Label from the purchase requisition. Note that this will also be the title that Bidders / Suppliers see, and that users should always spell out agency names and divisions/offices/bureaus.
- Set the **Sourcing Type** and **RFX Type** to **Quick Quote**.
- Confirm and make any necessary updates to the **Commodities** and/or **Organizations** fields. These fields are pre-populated based on your purchase requisition.
- Enter the **Open Date**. This informs when responses will be opened and reviewed.

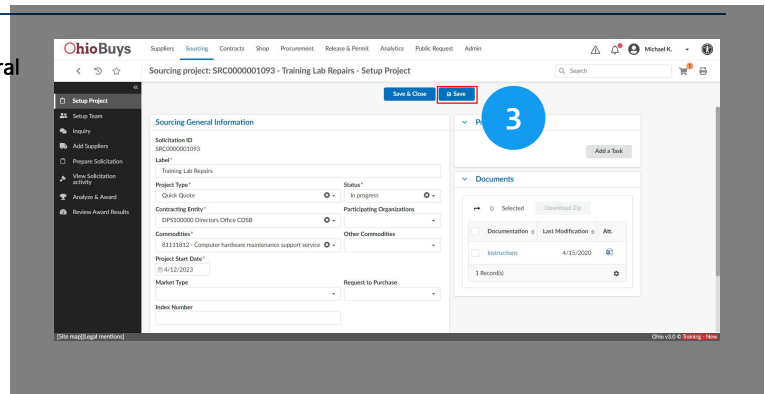
## Go to Sourcing Project

2. After completing the sourcing project fields, click **Go to Sourcing Project**.



## Sourcing General Information

3. The sourcing project is displayed. Review the **Sourcing General Information** section for accuracy. After making any relevant updates, click **Save**.

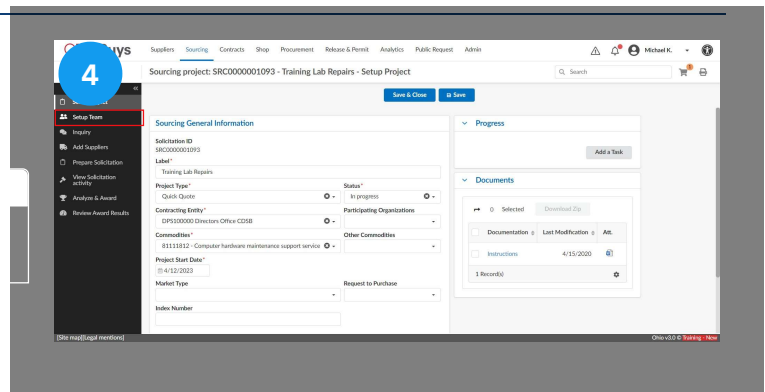


## Setup Team

4. Navigate to the **Setup Team** tab.

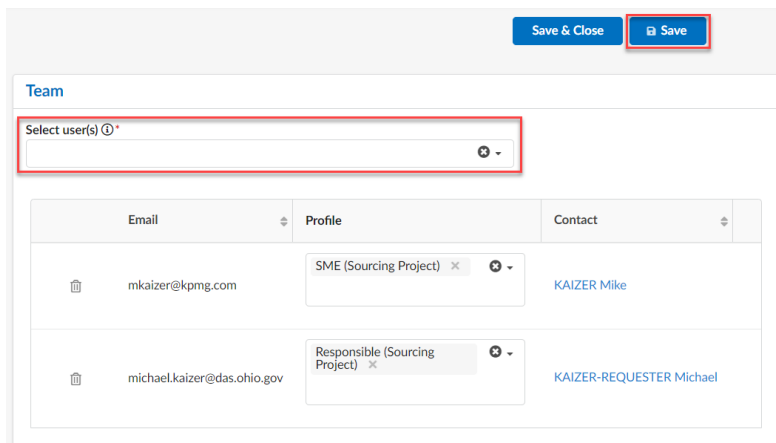
### ▲ Note

If there will not be any team members from your organization assisting you with this quick quote, you can proceed to step 5.



## Setup Team

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. Note that Requisitioners and Agency Procurement/Fiscal/Final Approvers can see all sourcing projects within their organizational scope (i.e., these users can see relevant sourcing projects without being manually added to each solicitation team).



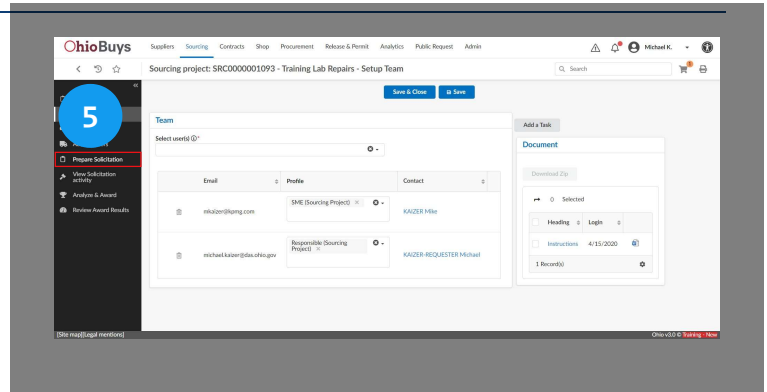
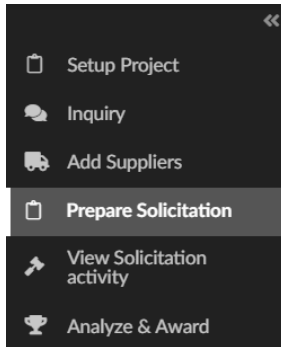
Search for your team members using the **Select User(s)** field, and update their **Profile** if appropriate. Then click **Save**.

### ▲ Note

- Only the user listed as Responsible for the project is able to release and award the quick quote.
- In most cases, users added to a team on a quick quote solicitation should be given either the **Contributor** or **SME** role.

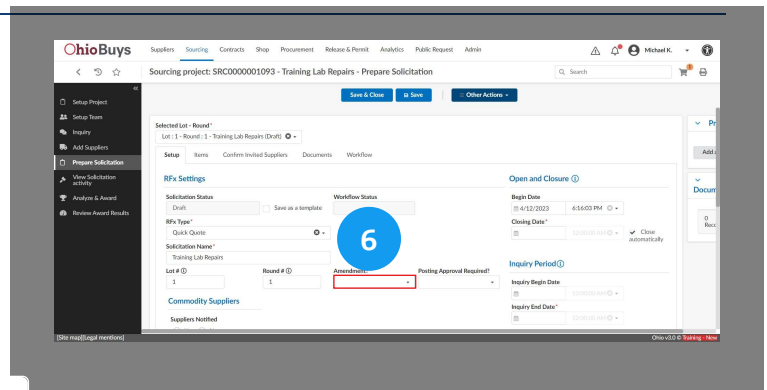
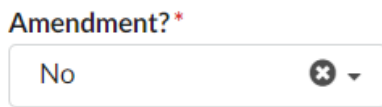
## Prepare Solicitation

5. Navigate to the **Prepare Solicitation** tab.



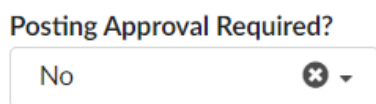
## Amendment

6. Update the **Amendment** field to **No**.



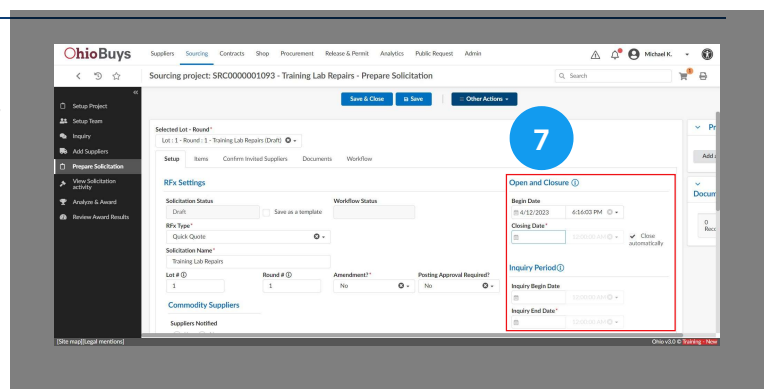
**▲ Note**

Though not required, users should also update the **Posting Approval Required** field to **No**.



## Dates

7. Update the solicitation dates, starting with the **Closing Date and time**, which is the date and time that responses will be due from Bidders and/or Suppliers.





## Solicitation Dates

### Open and Closure ⓘ

#### Begin Date

4/12/2023	6:16:03 PM
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#### Closing Date\*

4/13/2023	9:00:00 AM	<input checked="" type="checkbox"/> Close automatically
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### Open and Closure Dates

- **Begin Date** - The date and time the solicitation begins. This field will automatically populate with the date and time that the sourcing project was created.
- **Closing Date** - The date and time by which Bidders and Suppliers must submit their response(s). Closing dates and times should be during business hours so that issues can be resolved before bids are due.

To future date a solicitation start, enter a Begin Date that is in the future. When posting the solicitation, click Cancel in the pop-up window that appears. Doing so will block the Suppliers from bidding until the future Begin Date is reached, thereby future dating the solicitation.

### Inquiry Period ⓘ

#### Inquiry Begin Date

4/12/2023	12:00:00 AM
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#### Inquiry End Date\*

4/13/2023	9:00:00 AM
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### Inquiry Period Dates

- **Inquiry Begin Date** - The date and time that the inquiry period begins, and Suppliers will be able to submit questions using the inquiry function in OhioBuys. If the Inquiry Begin Date is not populated by the user, it will automatically match the solicitation posting date once the solicitation is open for bidding.
- **Inquiry End Date** - The date and time that the solicitation will stop accepting Supplier questions using the inquiry function. Users must always manually enter the Inquiry End Date.

### Enable for Public Posting ⓘ

#### Publication begin date

4/12/2023	12:00:00 AM
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#### Publication end date

4/13/2023	9:00:00 AM
-----------	------------

### Enable for Public Posting Dates

- **Publication begin date** - The date on which the solicitation will appear for viewing on the public OhioBuys solicitation portal. If not populated by the user, the publication begin date will automatically populate to match the Begin Date of the solicitation.
- **Publication end date** - The date on which the solicitation will stop appearing on the public OhioBuys solicitation portal. If not populated by the user, the publication end date will automatically populate with a date one year after the Closing Date of the solicitation.

#### ▲ Note

The attachment function for replying to inquiries is not enabled. All relevant details and documentation should be provided in the comments section. For more information on Supplier Inquiry, please consult the Creating, Managing, and Awarding Solicitations Learner Guide in the [OhioBuys Training Catalog](#).

▲ Note

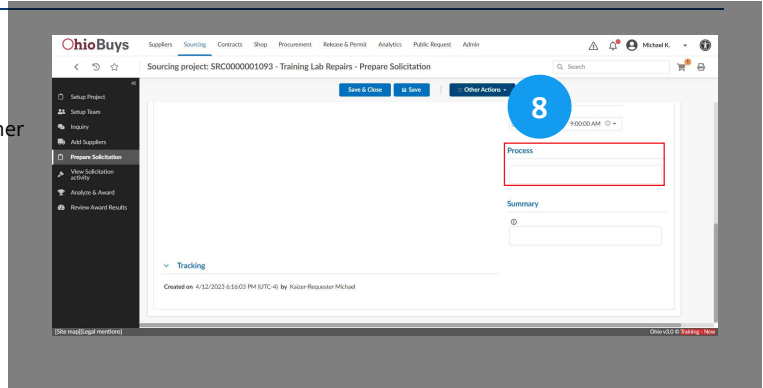
If the Publicly Post Opportunity checkbox is disengaged, verify that the **Commodity Suppliers Notified** selector is set to **No**.

## Process

8. Complete the **Process** field. This field provides additional details regarding the basis for making an award, and should be used to explain things like what the award will be based on or other procedures that apply to the solicitation.

### Process

Lowest bidder will be awarded.



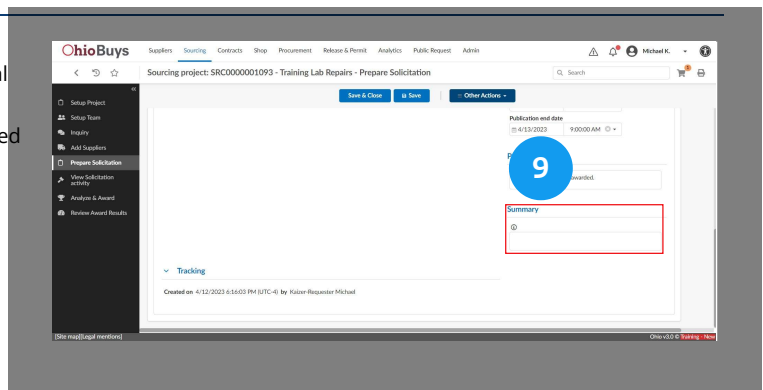
## Summary

9. Complete the **Summary** field, which should include additional details regarding the purpose for the solicitation. The Summary field will automatically populate with the the information contained in the Request Description field of the purchase requisition and needs to include a clear description of the need, when the goods/services will be needed, the Ship To address, and the method of payment.

### Summary



Repair services for the machines in our training lab. at 123 Parth Ave in Cleveland. Services are requested for late April. Payment will be made on site.



▲ Note

The Process and Summary fields will both be visible to the public on the OhioBuys public solicitation portal.

▲ **Note**

Though not required, users can complete the **Ship to** field on the Prepare Solicitation tab to provide Bidders and/or Suppliers with a precise shipping address.

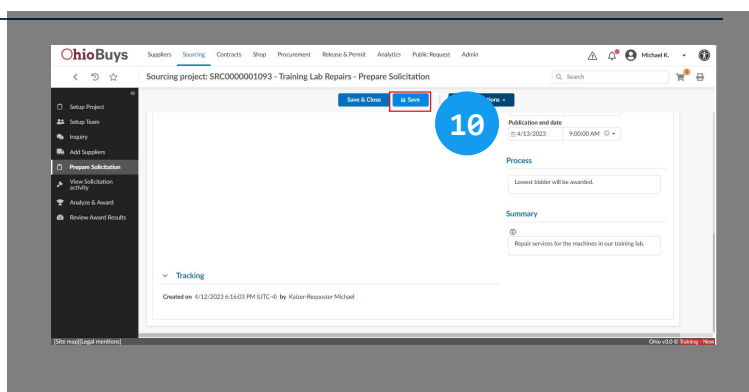
**Ship to**

Ship To

Available addresses are limited by a user's organizational scope. To add a Ship to address, begin typing one in and select it from the drop-down menu.

**Save**

10. Click **Save**.



For details on subsequent steps in the Quick Quote process, refer to the following assets:

[Identify Bidders and Suppliers for a Quick Quote](#)

[Release a Quick Quote Solicitation](#)

[Award a Quick Quote Solicitation](#)

[Update a Purchase Requisition with a Quick Quote Award](#)

If you have questions or need additional assistance, please contact the OBM Contact Center via email ([OBM.ContactCenter@obm.ohio.gov](mailto:OBM.ContactCenter@obm.ohio.gov)) or phone (877-644-6771).

# Ohio OhioBuys Locating an Existing Quick Quote Solicitation

Updated: 06/21/2024 05:22 PM

Version: 4.0

## 1 Purpose & Profiles

This job aid covers the process for locating a quick quote solicitation in OhioBuys.

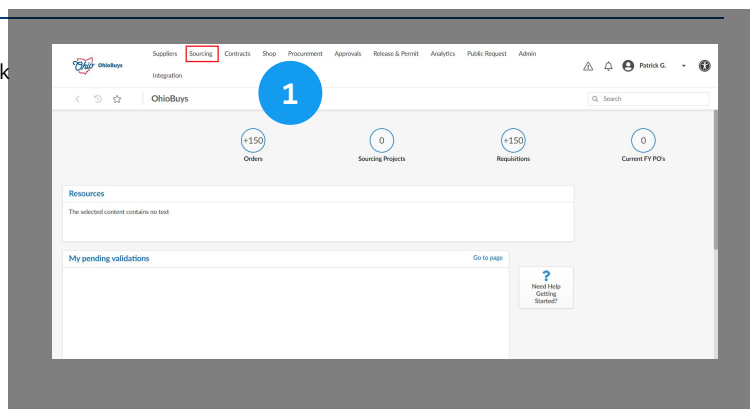
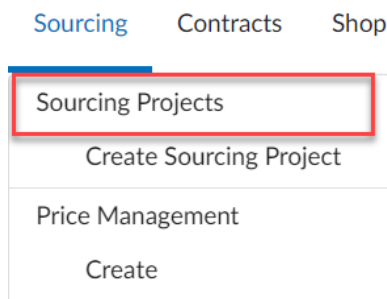
**Profiles:** Requisitioners, Requesters (with the Quick Quote Procurement User profile)

## Used When

Reference this when navigating to an existing quick quote solicitation that is in the in-progress, or completed state.

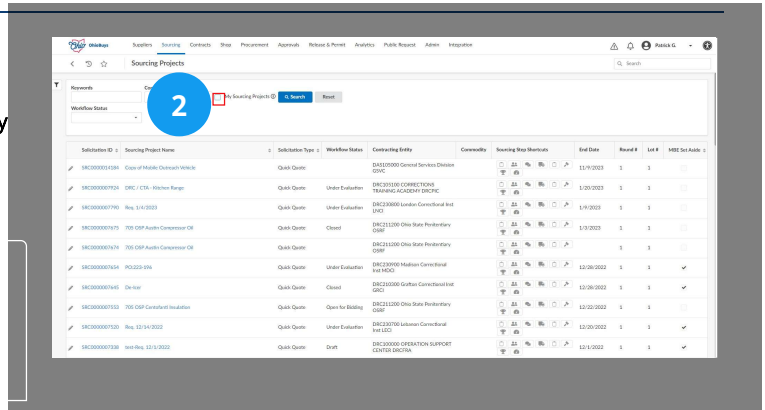
## Click Sourcing

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



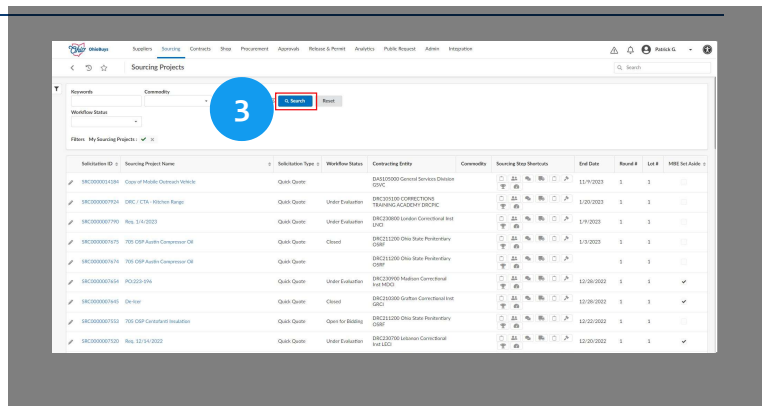
## Click My Sourcing Projects

2. 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.



## Click Search

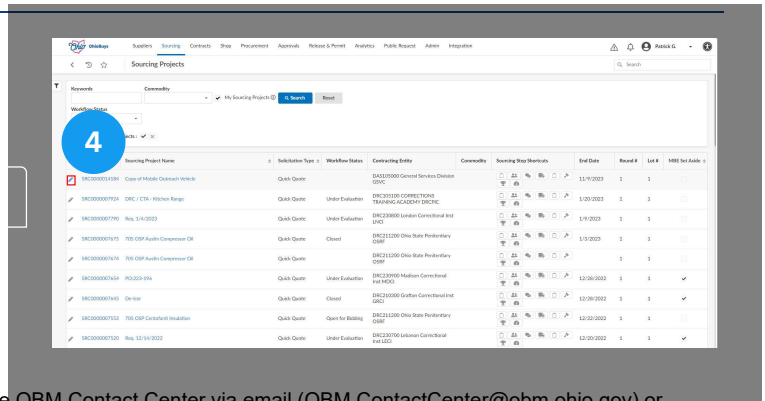
3. Click the **Search** button.



## Click the Pencil

4. Click the **Pencil** icon next to a quick quote to open it.

Pencil Icon:



If you have questions or need additional assistance, please contact the **OBM Contact Center** via email ([OBM.ContactCenter@obm.ohio.gov](mailto:OBM.ContactCenter@obm.ohio.gov)) or phone (877-644-6771).



# OhioBuys Identifying Bidders and Suppliers for a Quick Quote

Updated: 08/07/2024 03:03 PM

Version: 8.0

## 📌 Purpose & Profiles

This job aid covers the process for inviting Bidders and/or Suppliers to participate in a Quick Quote solicitation in OhioBuys.

**Profiles:** Requisitioners, Requesters (with the Quick Quote Procurement User profile)

## 📖 Used When

Reference this when inviting Bidders and/or Suppliers to participate in a quick quote solicitation.

For details on previous steps in the quick quote process, refer to the following assets:

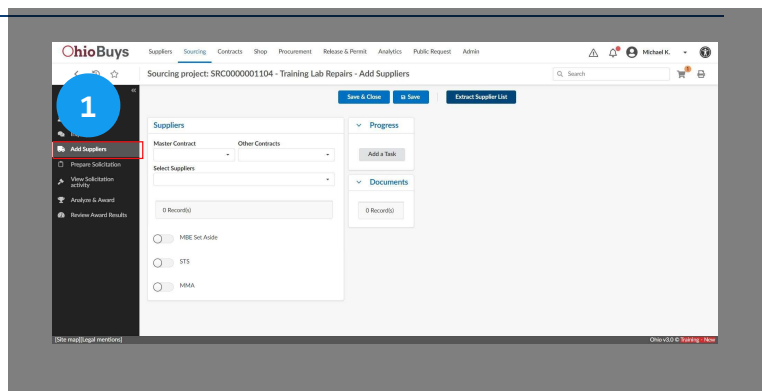
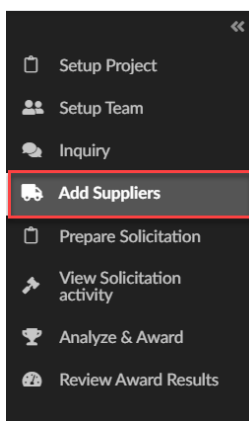
### [Create a Quick Quote Solicitation](#)

#### ▲ Note

In addition to the Bidders and Suppliers specifically invited to participate in a solicitation, unless the Suppliers Notified button on the Prepare Solicitation Tab is set to "No," all Bidders and Suppliers that have indicated they can provide the commodity associated with the solicitation will be notified that there is a new solicitation available.

## Add Suppliers

1. Open the quick quote solicitation, and navigate to the **Add Suppliers** tab.



▲ **Note**

If you wish to only invite Bidders and/or Suppliers who hold a valid MBDD status, turn on the **MBE Set Aside** indicator on this tab.

MBE Set Aside

If you wish to only invite Bidders and/or Suppliers from an STS or MMA contract, engage the **STS** and/or **MMA** slider(s).

STS

MMA

Note that this must be done before adding Suppliers. If either of these is selected, the Other Contracts field will become a required field and be pre-filtered to only show relevant STS or MMA contracts. Once a contract(s) is selected, all dealers associated with the selected contract(s) will be added to the Add Suppliers tab and will subsequently be invited to the solicitation.

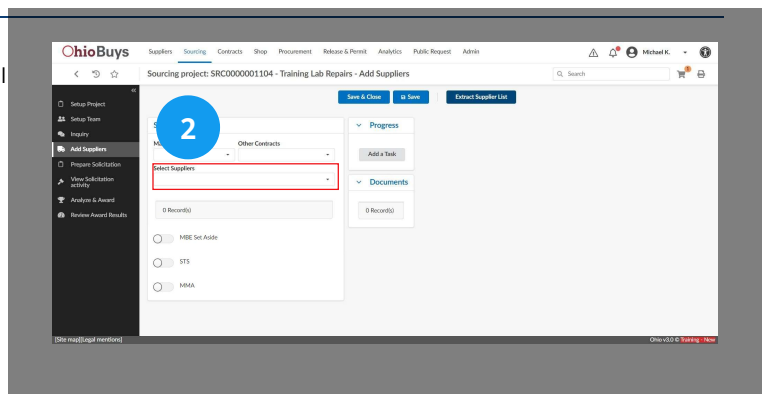
## Select Suppliers

2. Click the **Select Suppliers** field. By default, this drop-down will display all of the Bidders and Suppliers who have set up their account with the relevant commodity code(s) in OhioBuys.

Select Suppliers

CAREWORKS TECHNOLOGIES 0000067707 PO BOX 182878 43218-2878 COLUMBUS
DLT SOLUTIONS LLC 0000091103 2411 DULLES CORNER PARK STE 800 20171 HERNDON
INSIGHT PUBLIC SECTOR INC 0000085744 444 SCOTT DR 60108 BLOOMINGDALE
SIRIUS COMPUTER SOLUTIONS INC 0000081304 10100 REUNION PLZ STE 500 78216 SAN ANTONIO

[See All](#)



▲ **Note**

If the quick quote solicitation is for an item tied to a contract with Dealers, such as an STS contract, users can use the **Other Contracts** field to automatically pull all of the dealers into the list of added Suppliers.

Other Contracts

Users can locate the contract by clicking in the Other Contracts field and typing in the name of the contract, then selecting it from the drop-down menu. Users are able to select multiple contracts at once in the Other Contracts field.

Additionally, users can click **See All** on the Other Contracts field, search by an **index number** on the left side (e.g. STS123), check all of the contracts that come back, and then pull in all dealers for a particular index number.

▲ **Note**

In certain circumstances, such as when conducting a two-phase quote, it may be appropriate to select Suppliers based on preexisting contracts in OhioBuys. Note that the process below does **not** work to add all of the Supplier(s) and Dealers from an STS contract. To locate the Dealers on an STS contract, please follow the steps outlined in the next note of this job aid.


Master Contract  Other Contracts

- If applicable, users can indicate the **Master Contract** and/or **Other Contracts** for the solicitation. This will automatically add all Suppliers associated with the Contract(s) to the list of invited Suppliers.
- These options are most commonly used when a contract has already been awarded to a pool of pre-qualified Suppliers and secondary solicitations amongst those Suppliers are required before a purchase can be made.
- Adding a **Master Contract** will pull the Supplier associated with a parent contract, as well as the suppliers associated with any child contracts. Note that users may only add one Master Contract.
- Adding **Other Contracts** will pull in the Supplier associated with a particular contract. Users should use this field to easily add the suppliers associated with a Competitive Selection Two Phase Contract. This field can also be used to quickly add contract Suppliers that are associated with a particular Index Number. Note that users may select multiple Other Contracts.

Other Contracts

test1234 - Test Real Estate Amendment #1  
SERVICENOW-CATALOG - ServiceNow Catalog  
CTR001313 - Office Supplies and Related Products  
000009-01 - NexGen eProcurement  
CTR001307 - MWK Punchout v2  
CSP900917 - MANAGED SERVICE PROVIDER FOR NON-IT STAFF AUGMENTATION SERVICES Amendment #2  
800767 - DO NOT USE Agricultural Machinery - Tractors, Mowers, Combines & Loaders, etc.  
CTR001297 - Blanket Test Enhancement  
CRP30004 - Assorted Pressure-Sensitive Tapes v2  
12345 - ALB Robv2 082120 Amendment #2

[See All](#)

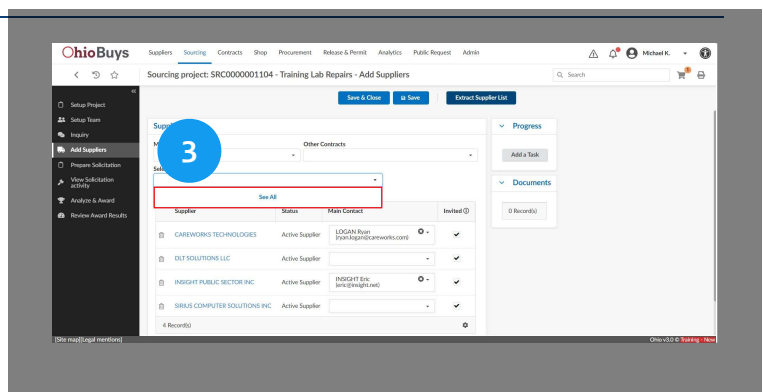
- Users can conduct a more detailed search in either the Master Contract or Other Contracts field by clicking in the drop-down menu and selecting See All. There, users can search for contract(s) using a variety of filters, such as the Index Number, by clicking on the More Filters (  ) icon. Selections can be made from the See All menu by clicking the Checkbox (  ) icon(s) next to the relevant contract(s).

**See All**

3. To add additional Bidders and Suppliers that have not indicated on their company profile that they can provide the commodity associated with the solicitation on the profile, click **See All** in the Select Suppliers drop-down.

Select Suppliers

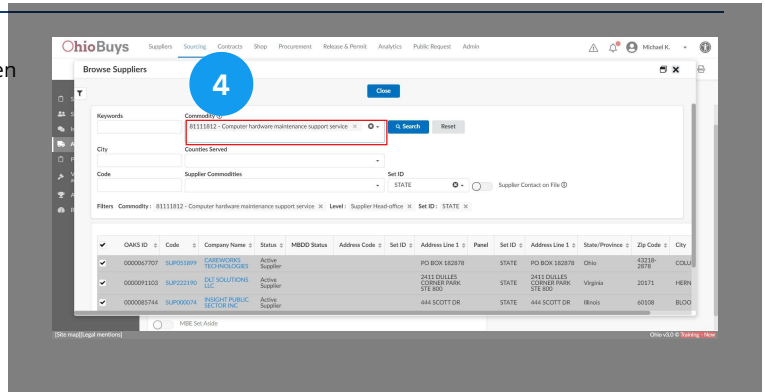
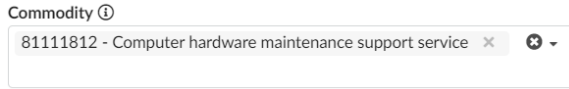
[See All](#)





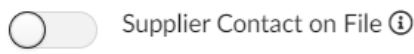
### Commodity Filter

4. Click the **X** icon next to the **Commodity** filter to remove it, then search for the Bidder and/or Supplier you would like to invite.



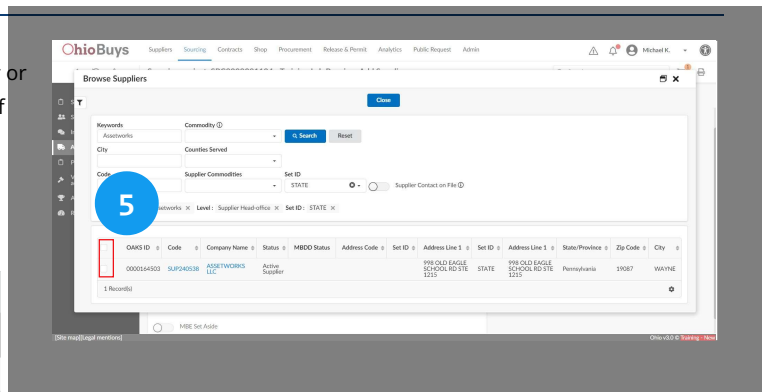
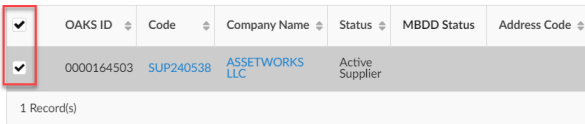
#### ▲ Note

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



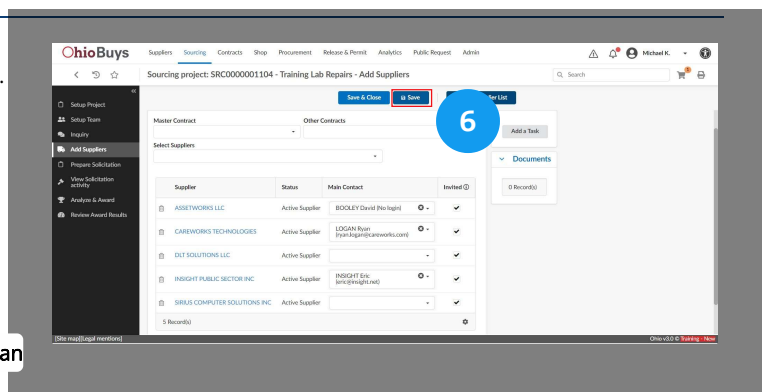
### Checkbox Icon


5. Click the **Checkbox** icon select a particular Bidder or Supplier or click the **Checkbox** icon next to the **OAKS ID** header to select all of the displayed Bidders and/or Suppliers. Then close the Browse Suppliers pop-up window.



### Save

6. Click **Save** to confirm the list of invited Bidders and Suppliers.



If you would like to remove a Bidder or Supplier, click the **Trash Can** (  ) icon next to their name and then click **Save**.

▲ **Note**

Users should select the **Sourcing Invitation Contact** to be listed as the **Main Contact** for the solicitation, if the supplier has applied that role to a user's account.

Supplier contacts

+ Create New Supplier Contact    Select Existing Contact

Contact	Login	Role	Other assigned suppliers	Email	Primary Phone
BROWN GEORGE	GBROWN@BESOLUTIONS.ORG	Contract contact Order Contact Revenue Share Contact Supplier admin	BROWN ENTERPRISE SOLUTIONS LLC	GBROWN@BESOLUTIONS.ORG	
Hunter Sally	shunter@besolutions.org	Revenue Share Contact Supplier admin <b>Sourcing Invitation Contact</b>	BROWN ENTERPRISE SOLUTIONS LLC	shunter@besolutions.org	614/588-0248
Request Ohio Buys	BESOBREQUEST@BESOLUTIONS.ORG	Contract contact	BROWN ENTERPRISE SOLUTIONS LLC	BESOBREQUEST@BESOLUTIONS.ORG	614-588-0248
Sherman Kara	ksherman@besolutions.org	Contract contact Order Contact Revenue Share Contact Supplier admin	BROWN ENTERPRISE SOLUTIONS LLC	ksherman@besolutions.org	6145880248

For details on subsequent steps in the quick quote process, refer to the following assets:

[Release a Quick Quote Solicitation](#)

[Award a Quick Quote Solicitation](#)

[Update a Purchase Requisition with a Quick Quote Award](#)

If you have questions or need additional assistance, please contact the OBM Contact Center via email ([OBM.ContactCenter@obm.ohio.gov](mailto:OBM.ContactCenter@obm.ohio.gov)) or phone (877-644-6771).

# Ohio OhioBuys Releasing a Quick Quote Solicitation

Updated: 06/21/2024 05:35 PM

Version: 8.0

## 1 Purpose & Profiles

This job aid covers the process for releasing a quick quote solicitation.

**Profiles:** Requisitioners, Requesters (with the Quick Quote Procurement User profile)

## Used When

Reference this when you are ready to post a quick quote solicitation and accept bids.]

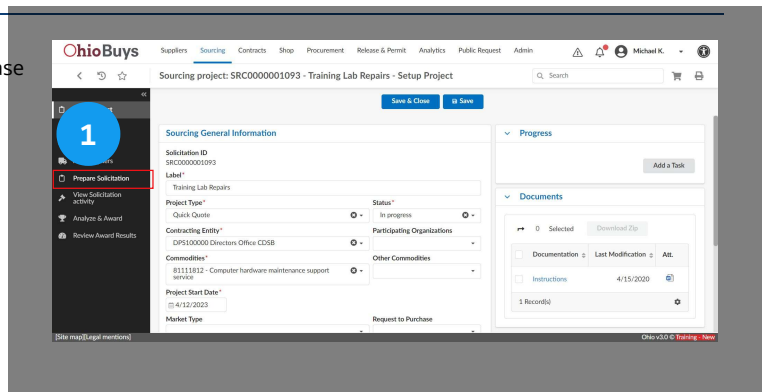
For details on previous steps of the Quick Quote process, refer to the following assets:

[Create a Quick Quote Solicitation](#)

[Identify Bidders and Suppliers for a Quick Quote](#)

## Prepare Solicitation

1. Open the quick quote solicitation that you would like to release and navigate to the **Prepare Solicitation** tab.



## Items

2. Navigate to the **Items** header to confirm the items that have been added automatically from the purchase requisition.

Selected Lot - Round \*

Lot : 1 - Round : 2 - Training Lab Repairs (Open for Bidding) ↕

Setup **Items** Confirm Invited Suppliers Documents Workflow

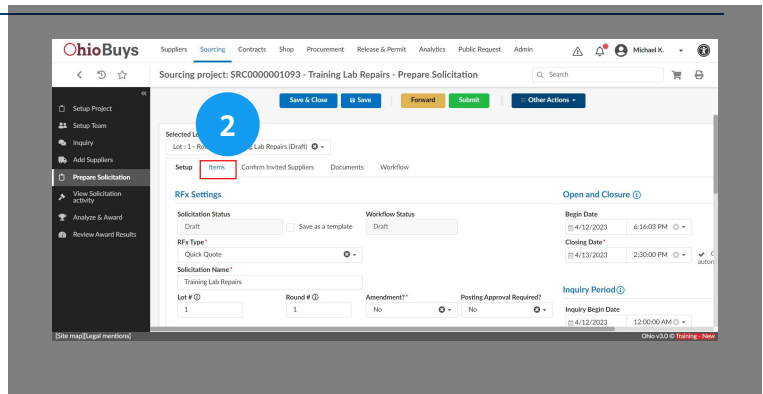
**RFX Settings**

Solicitation Status: Open for Bidding  Save as a template Workflow Status: Open for Bidding

RFX Type: Quick Quote

Solicitation Name\*: Training Lab Repairs

Lot # ①: 1 Round # ①: 2 Amendment?\*: Yes



## Quick Quote Item Grid

+ Add Grid + Add products Export Grids to Excel Import Grids from Excel Preview

Use the excel Export/Import feature for large solicitations (exceeding 300 items)

### Response

≡ Actions ▾

0 Selected Delete Selected Items

	Code (V) ⇅	Type (V) ⇅	Label (V) *	Qty (V) *	Unit (V) *	Unit price (V)	Amount (V)	Reference Price ⇅	Deliv. date (V)	Deliv. date (V) ⇅
	I1_2	Require d Item								
	1	Require d Item	Training Lab Desktop Repairs	1	AMT					

1 Record(s)

- 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** (for Products), **Manufacturer**, **SKU Number**, and **Detailed Description** sections. (Some of these fields are not applicable when obtaining a quick quote for a catalog item.)
- Any fields with a **(V)** in the title are fields that are visible to a Bidder and/or Supplier when submitting their 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.
- To make a field mandatory for a Bidder and/or Supplier, right-click on the column header for the field you like to update and then select **Column Settings**. From the displayed pop-up window, click the **Required?** checkbox and then click **Save & Close**.

### ▲ Note

If there is a need to add additional items to the quick quote, it is recommended that users first add them to the purchase requisition, and then create a new quick quote using the Create Solicitation button. Lines added directly to the quick quote will not be able to be updated on the purchase requisition.

## Documents

3. Navigate to the **Documents** header to confirm that any relevant attachments have been applied to the solicitation.

Selected Lot - Round\*

Lot: 1 - Round: 3 - Training Lab Repairs (Draft)

Setup Items Confirm Invited Suppliers **Documents** Workflow

**Rfx Settings**

Solicitation Status: Draft  Save as a template Workflow Status:

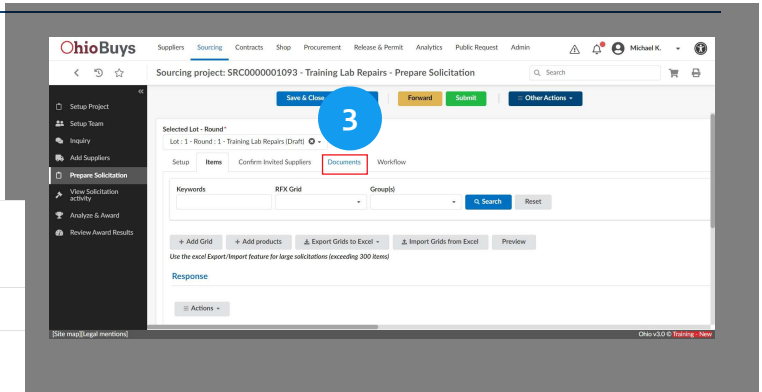
Rfx Type\*: Quick Quote

Solicitation Name\*: Training Lab Repairs

Lot # ①: 1 Round # ①: 3 Amendment?\*  Posting Approval Required?

**Commodity Suppliers**

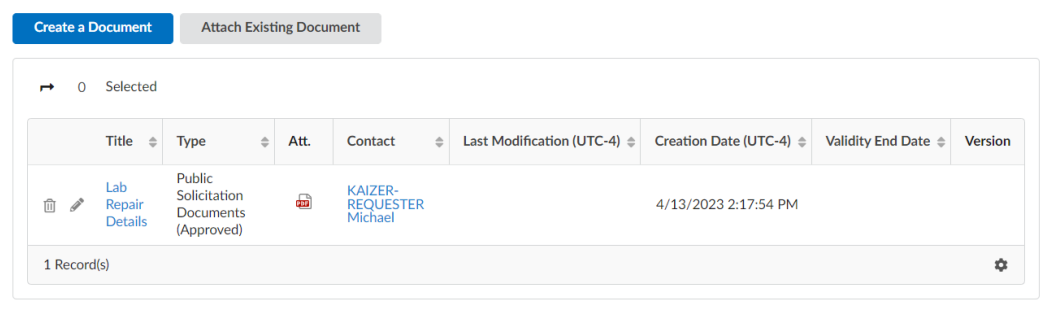
Suppliers Notified:  Yes  No



▲ **Note**

If your solicitation does not require attachments, proceed to step 5.

## Quick Quote Documents

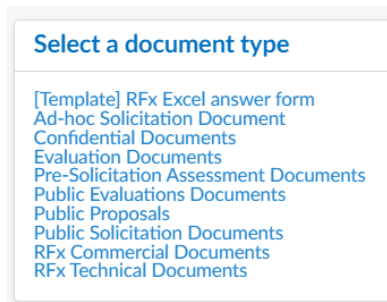


The screenshot shows a user interface for managing documents. At the top, there are two buttons: "Create a Document" (highlighted in blue) and "Attach Existing Document". Below these is a table with the following columns: Title, Type, Att., Contact, Last Modification (UTC-4), Creation Date (UTC-4), Validity End Date, and Version. A single record is displayed with the following details: Title: Lab Repair Details, Type: Public Solicitation Documents (Approved), Att.: [document icon], Contact: KAIZER-REQUESTER Michael, Last Modification: 4/13/2023 2:17:54 PM, and Creation Date: 4/13/2023 2:17:54 PM. At the bottom of the table, it says "1 Record(s)" and there is a gear icon for settings.

Users should use the documents section to upload any attachments that Suppliers will need in order to submit their response.

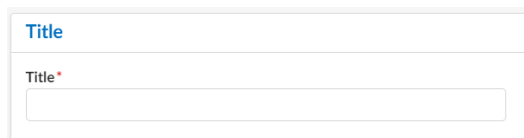
**Create a Document**

- Click **Create a Document**.



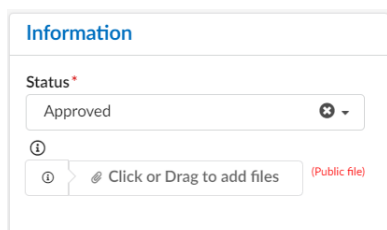
The screenshot shows a dropdown menu titled "Select a document type". The menu is open, displaying a list of document types: [Template] RFx Excel answer form, Ad-hoc Solicitation Document, Confidential Documents, Evaluation Documents, Pre-Solicitation Assessment Documents, Public Evaluations Documents, Public Proposals, Public Solicitation Documents, RFx Commercial Documents, and RFx Technical Documents.

- Select a **document type**. For most documents attached to a quick quote, users can select **Public Solicitation Documents**.



The screenshot shows a form field labeled "Title". Below the label is a text input box with a red asterisk next to the label, indicating it is a required field.

- Input a document **Title**. This is the name of the document that will appear within OhioBuys.



The screenshot shows the "Information" section of the form. It includes a "Status" dropdown menu with "Approved" selected. Below the status is an information icon (i) and a button labeled "Click or Drag to add files" with a red asterisk and the text "(Public file)" next to it.

- Use the **Click or Drag to add files** button to either drag the attachment from your desktop, or search for it in the File Explorer.

**Save & Close**

- After uploading the attachment, click **Save & Close**.

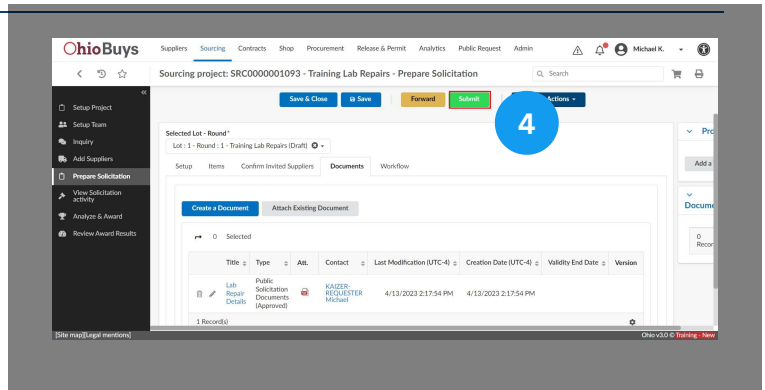
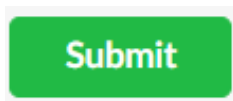
Repeat the above process as required to upload any additional documents.

### ▲ Note

All documents uploaded to the documents section of the quick quote will be posted to the public. Users should be careful not to attach any internal-facing files to the solicitation.

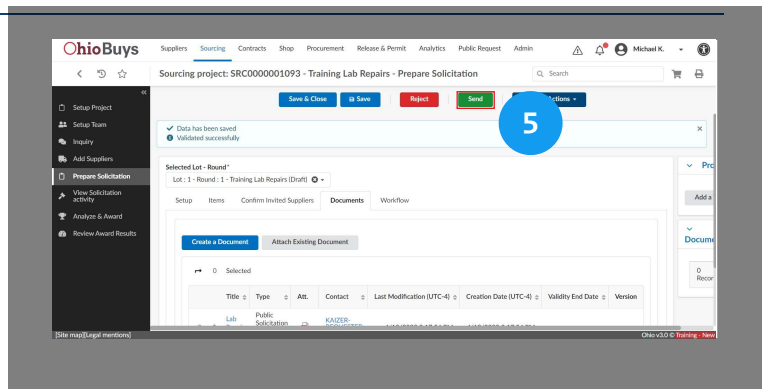
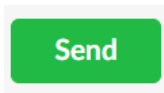
## Submit

4. Click **Submit**.



## Send

5. Click **Send**.



## Sending a Solicitation Invitation

Complete the following steps on the displayed pop-up window:

RFx Quick Quote 4/21/2023

**Files to attach**

RFx documents  Excel 97-2003 quotation form (xls)  Excel 2007-2010 quotation form (xlsx)

**Send to**

<input checked="" type="checkbox"/>	Company Name	Sending modes	User
<input checked="" type="checkbox"/>	CINCINNATI ASSOCIATION FOR THE BLIND	Email	DOELLMAN RACHEL

Copy all team members

**Email**

**Subject**  
OhioBuys: Solicitation Invitation: Quick Quote 4/21/2023  Send me a copy

Dear [Contact\_firstname] [Contact\_lastname],

You are invited to participate in an OhioBuys solicitation: Quick Quote 4/21/2023.

This opportunity will close on 4/22/2023. Please [click here](#) to navigate to the event.

**Event Details:**

- Solicitation Name: Quick Quote 4/21/2023
- Solicitation ID: SRC0000001105

1. Select the files you would like to attach to the invitation to bid email.
2. Confirm the Bidder and/or Supplier list. Note that if a Supplier does not have a Supplier Contact in OhioBuys, you will need to deselect that Supplier by unchecking the checkbox to its left, and will need to contact the Supplier outside of OhioBuys.
3. 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 OhioBuys.

### ▲ Note

- Once a solicitation is posted, it will also become available on the OhioBuys Public Portal unless the Publicly Post Opportunity checkbox has been unchecked. This means that the solicitation is visible to **all** Suppliers regardless of whether or not they were invited to participate.
- Alternative methods in OhioBuys to view and get a copy of the Solicitation Invitation email:
  1. Click the **View Solicitation Activity** tab, click on the link in the **Email** column for one of the suppliers, from the Sent Email screen click the email link under the Subject column to view and save a copy of the email.
  2. Click the **Workflow** tab within the Prepare Solicitation tab, scroll down to **Mail History** section, click the email link in the Subject column for one of the suppliers, and view and save a copy of the email.

## Send & Close

6. Click **Send & Close**, and click **OK** in any pop-ups that appear.

**Send and close**

OhioBuys

RFx Training Lab Repairs

**Email**

**Subject**  
OhioBuys: Solicitation Invitation: Training Lab Repairs  Send me a copy

Dear [Contact\_firstname] [Contact\_lastname],

You are invited to participate in an OhioBuys solicitation: Training Lab Repairs.

This opportunity will close on 4/13/2023. Please [click here](#) to navigate to the event.

**Event Details:**

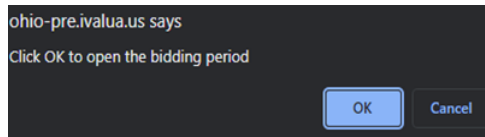
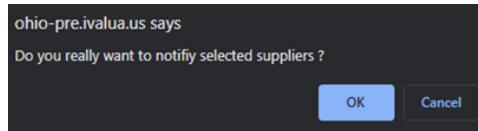
- Solicitation Name: Training Lab Repairs
- Solicitation ID: 0P0000000000
- Main commodity: Computer hardware maintenance support service
- Lot # 1
- Round # 1
- Contracting Entity: DPS100000 Directors Office CDSB

For more information, please access OhioBuys.

Thank you.

[100 max] Legal members | 1 Record(s) | Ohio v3.0 © Training Item



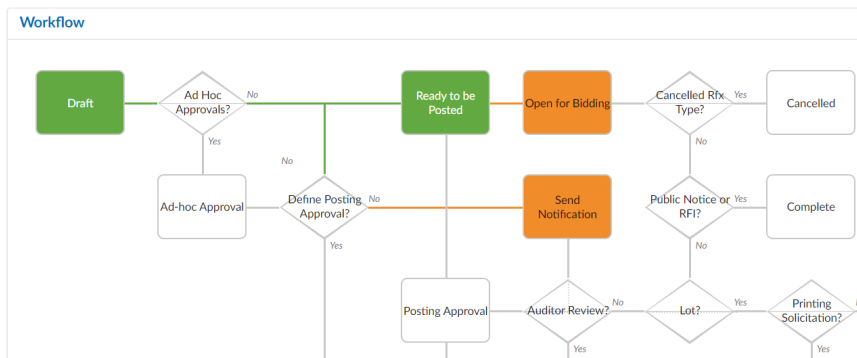


The solicitation has now been posted. To confirm its status, on the Prepare Solicitation tab confirm that it has both a **Solicitation Status** and a **Workflow Status** of **Open for Bidding**.

**RFx Settings**

<b>Solicitation Status</b> Open for Bidding	<input type="checkbox"/> Save as a template	<b>Workflow Status</b> Open for Bidding
<b>RFx Type</b> Quick Quote		
<b>Solicitation Name *</b> Quick Quote 4/21/2023		
<b>Lot # ①</b> 1	<b>Round # ①</b> 1	<b>Amendment? *</b> No

The workflow for a posted solicitation should resemble the image below:



If the **STS** or **MMA** slider is engaged on the **Add Suppliers** tab on your quick quote, all of the dealers associated with the contract will be automatically notified when the solicitation is posted.

▲ **Note**

Once a solicitation is posted, Suppliers will be able to access it from the Public Solicitation page. Before Suppliers can 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.

[Read State Terms & Conditions](#)

**Receipt acknowledged on 3/2/2023 2:59:29 PM (UTC-5)**

---

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.

To future date a solicitation start, enter a Begin Date that is in the future. When posting the solicitation, click Cancel in the pop-up window that appears. Doing so will block the Suppliers from bidding until the future Begin Date is reached, thereby future dating the solicitation.

▲ **Step-by-Step Instructions for Sending Notices To Additional Bidders Note**

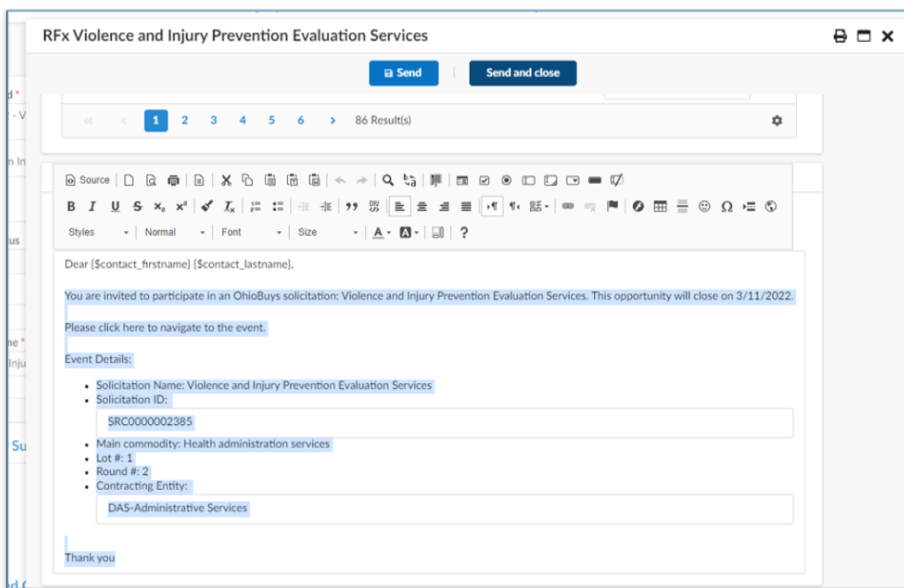
The Inquiry tab of the solicitation has a “notice” message type that allows users send communications to external emails. Follow this process to send bid notification to additional bidders that do not have OhioBuys contacts. Note, this additional notice should occur shortly after posting the solicitation.

Prep Stage

1. Gather the list of additional bidders.
2. Format all emails in a chain, separated by a semicolon (;). Do not use any spaces in between emails.  
Ex.david.colopy@das.ohio.gov;randall.dublikar@das.ohio.gov;curtis.brooks@das.ohio.gov
3. Have this file open and available at the time you post your solicitation (will be copy & pasting this later)

Posting

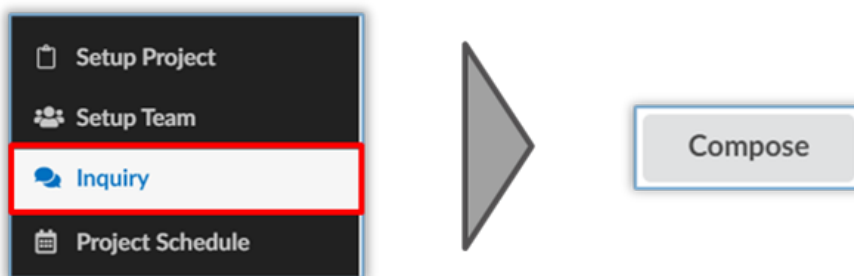
1. Approvals are obtained, posting dates are updated, and you are ready to advertise.
2. Click **Send**.
3. Scroll down on the popup to the language of the message. Copy the text of the message except for the heading (“Dear {\$contact\_firstname} {\$contact\_lastname}”)



4. Click **Send and Close**, along with confirming the two pop-ups for notifications and posting to the site.

▲ **Step-by-Step Instructions for Posting a Solicitation Note**

Navigate to the Inquiry tab and click Compose.



Update the **Message Type** field to **Notice** by selecting it from the drop-down menu.

In the Recipients field, select **Responsible – Sourcing project**.

Enter the emails of the users you would like to invite in the **External Emails field**, separated by a “,” – note that you should not put a space between emails after the semicolon.

Complete the **Subject** field and fill in the body of the message with the copied text from posting the solicitation. Note that if you did not copy the text from the initial notice (step 3 of Posting), you can retrieve the language from the View Solicitation Activity tab.

Click **Send**.

The screenshot shows a web form for sending a message. At the top, there is a 'Message Type' dropdown menu set to 'Notice' and a checkbox labeled 'Send me a copy'. Below this is a text input field containing 'Price Alex'. The main section is titled 'Send To' and contains two columns: 'Recipients' with a dropdown menu and 'External Emails' with a text input field. Below these is a 'Subject' field with two lines of text input. At the bottom, there is a 'Click or Drag to add files' button, a green 'Send' button, and a red 'Cancel' button.

Your message will be delivered to the email addresses indicated informing them of the solicitation in OhioBuys. Note that prospective Bidders and/or Suppliers will need to register in OhioBuys in order to submit a response.

▲ **Step-by-Step Instructions for Posting a Solicitation that is not Publicly Posted Note**

Alternative methods in OhioBuys to view and get a copy of the Solicitation Invitation email:

1. Click the View Solicitation Activity tab, click on the link in the Email column for one of the suppliers, from Sent Email screen click the email link under the Subject column to view and save a copy of the email.
2. Click any subtab within the Prepare Solicitation tab, scroll down past the Workflow to Mail History section, click the email link in the Subject column for one of the suppliers, and view and save a copy of the email.

▲ **Step-by-Step Instructions for Sending Notices To Additional Bidders Note**

Additional Bidder Notification:

1. The solicitation is now posted. Navigate to the **Inquiry** tab.
2. Click **Compose**.
3. Change the **Message Type** to Notice.
4. Select yourself as the recipient
5. Paste the text copied from step 3 above into the message text.
6. List the SRC Number and "Solicitation Notification" in the **Subject** field.
7. Add the list of additional bidder emails, formatted with no spaces & separated with a semicolon, and past into the external email box.

The screenshot shows the 'Send To' form in the OhioBuys system. At the top, there is a 'Message Type' dropdown menu set to 'Notice' and a checkbox for 'Send me a copy'. Below this is a text box containing the name 'Oswald James'. The main section is titled 'Send To' and contains two columns: 'Recipients \* ⓘ' and 'External Emails ⓘ'. The 'Recipients' column has a dropdown menu showing '> Responsible (Sourcing Project)- OSWALD James' with a close button 'x'. The 'External Emails' column has a text box containing 'david.colopy@das.ohio...'. Below these is a 'Subject \*' field with the text 'SRC2385 Solicitation Notification'. The bottom section contains the email body text: 'You are invited to participate in an OhioBuys solicitation: Violence and Injury Prevention Evaluation Services. This opportunity will close on 3/11/2022. Please [click here](#) to navigate to the event. Event Details: • Solicitation Name: Violence and Injury Prevention Evaluation Services • Solicitation ID: SRC0000002385 • Main commodity: Health administration services • Lot #: 1 • Round #: 2 • Contracting Entity: DAS-Administrative Services'.

8. Click **Send**.

If you do not copy the text from the initial notice (step 3 of Posting), you can retrieve the language from the View Solicitation Activity tab.

For details on subsequent steps in the quick quote process, refer to the following assets:

[Award a Quick Quote Solicitation](#)

[Update a Purchase Requisition with a Quick Quote Award](#)

If you have questions or need additional assistance, please contact the OBM Contact Center via email ([OBM.ContactCenter@obm.ohio.gov](mailto:OBM.ContactCenter@obm.ohio.gov)) or phone (877-644-6771).

## 📌 Purpose & Profiles

This job aid covers the process of canceling a solicitation.

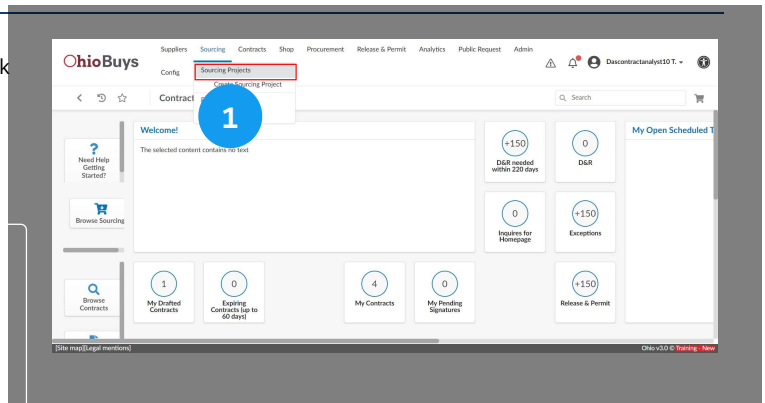
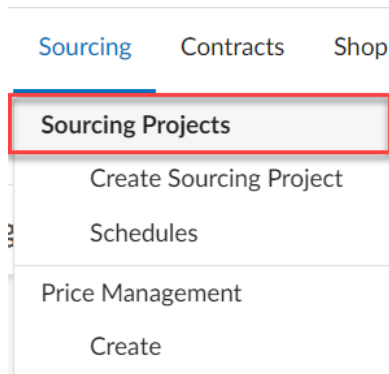
**Profiles:** Contract Analyst, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, Agency Contract Analyst, Procurement Manager, Agency Sourcing Associate

## 📖 Used When

Reference this when attempting to cancel a solicitation.

## Navigate to Sourcing Projects

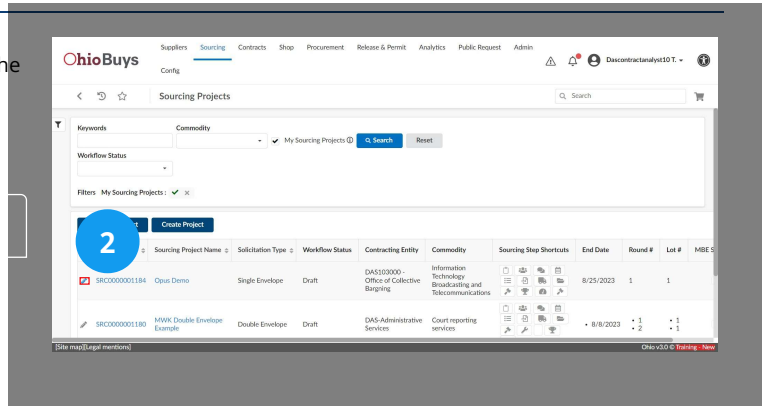
1. Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.



## Open Solicitation

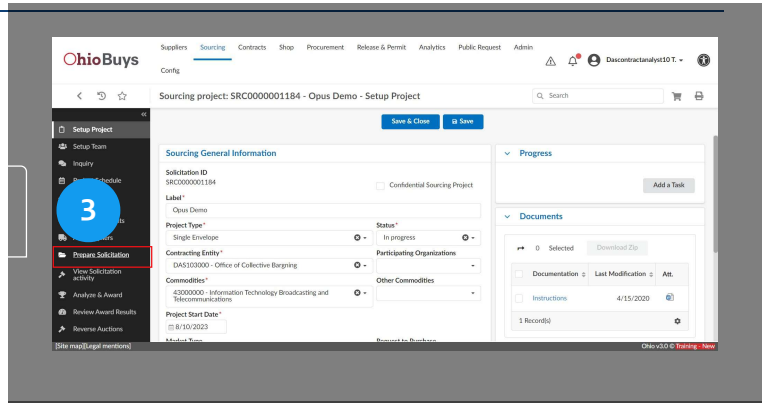
2. Open the sourcing project you would like to edit by clicking the Pencil icon.

Pencil Icon: 

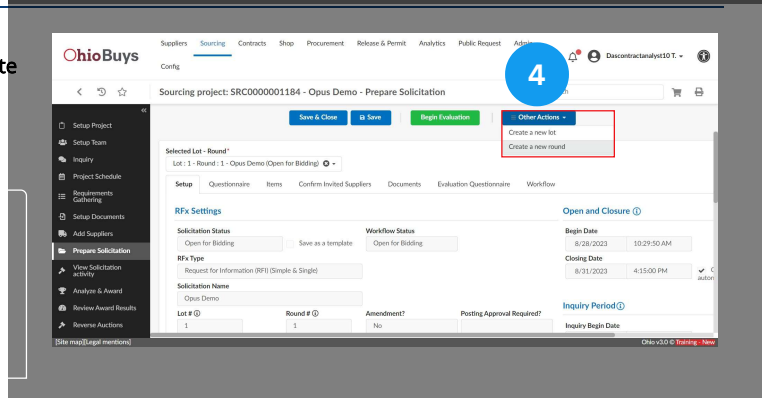
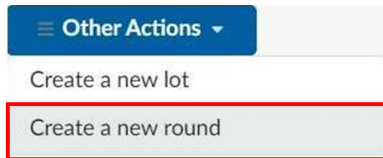


## Navigate to Add Suppliers

3. Navigate to the Prepare Solicitation tab.

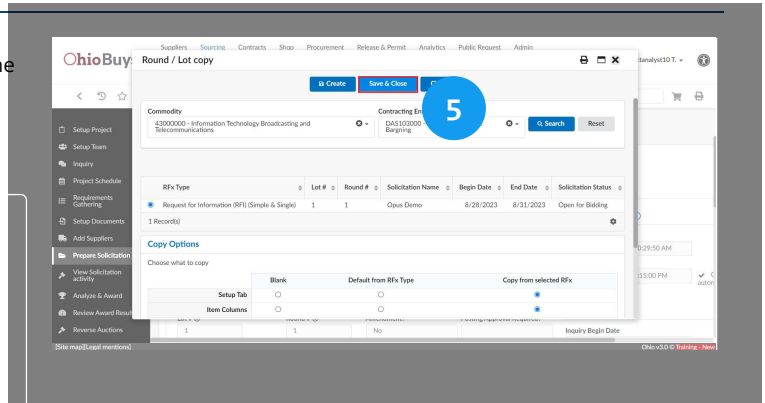
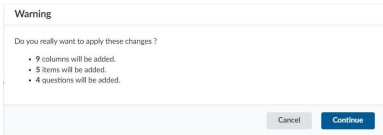


4. Click the Other Actions drop-down menu and then click Create a New Round.



## Create a New Round

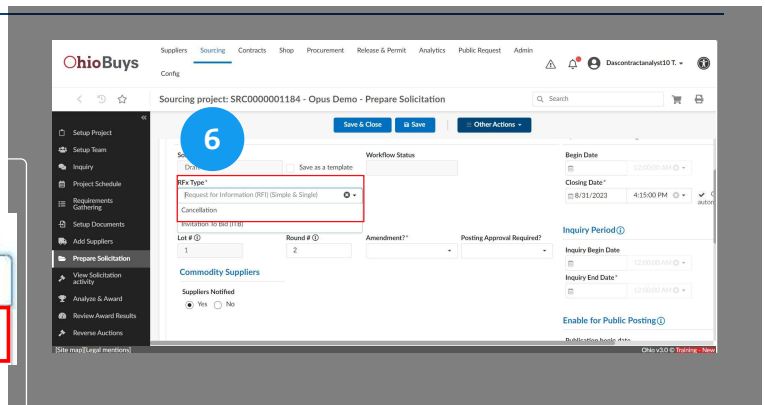
5. The new round will default to copying all information from the previous round. Click **Save & Close** to make a new round.



The following window will appear afterwards. Click **Continue** to apply changes.

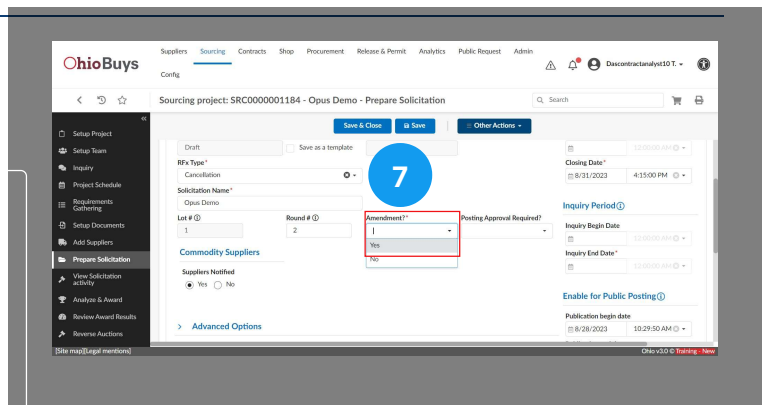
## Update Rfx Type

6. Click the **Rfx Type** field and update the field to **Cancellation**.



## Update the Amendment Field

7. Click the **Amendment** field and update the field to **Yes**.





## Update Sourcing Dates

8. Click the **Begin Date** to set a future date and time, and set the **Closing Date** to some time after the **Begin Date**.

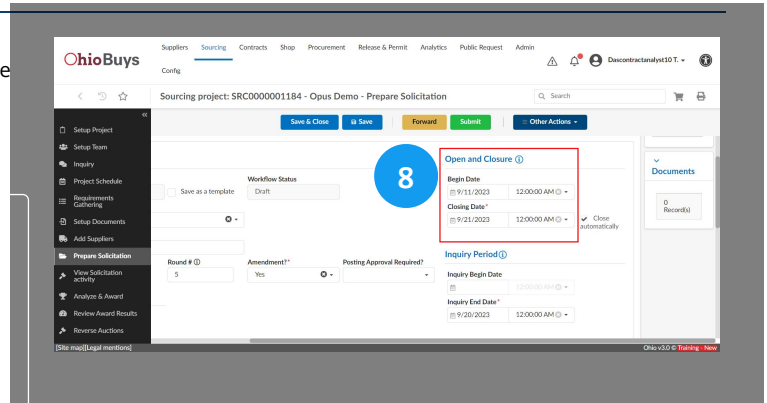
### Open and Closure ⓘ

#### Begin Date

9/11/2023	12:00:00 AM
-----------	-------------

#### Closing Date\*

9/21/2023	12:00:00 AM
-----------	-------------



## Update Sourcing Dates Cont.

9. Click the **Inquiry Begin Date** to set a future date and time, and set the **Inquiry End Date** to some time after the **Inquiry Begin Date**.

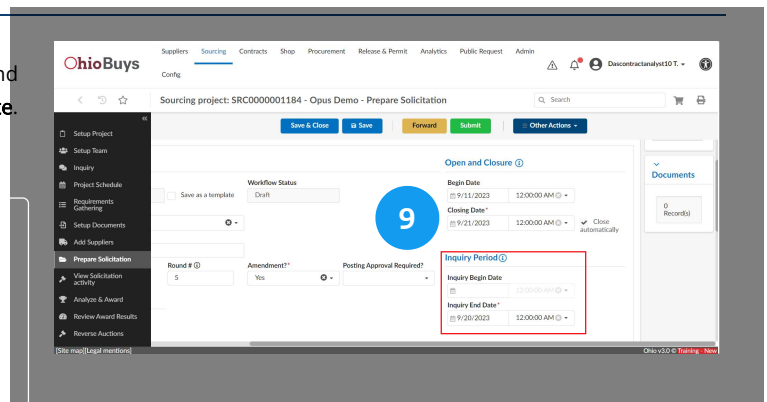
### Inquiry Period ⓘ

#### Inquiry Begin Date

	12:00:00 AM
--	-------------

#### Inquiry End Date\*

9/20/2023	12:00:00 AM
-----------	-------------

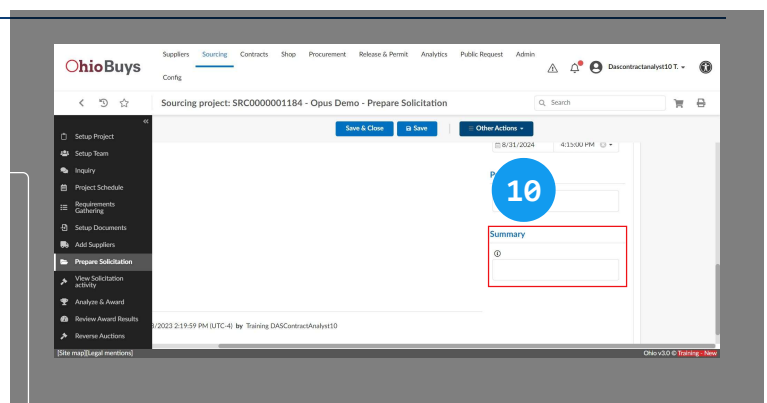


## Create a Public Cancellation Notice

10. In the **Summary** field, enter any public notes.

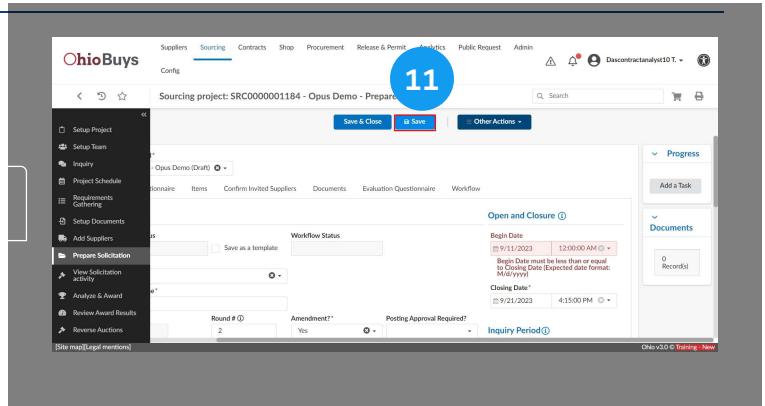
### Summary

ⓘ



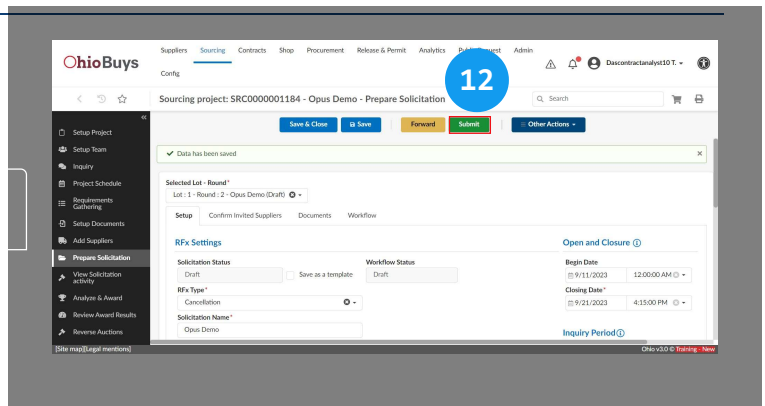
## Save Cancellation Round

11. Click **Save**.



## Submit Cancellation Round

12. Click **Submit**.



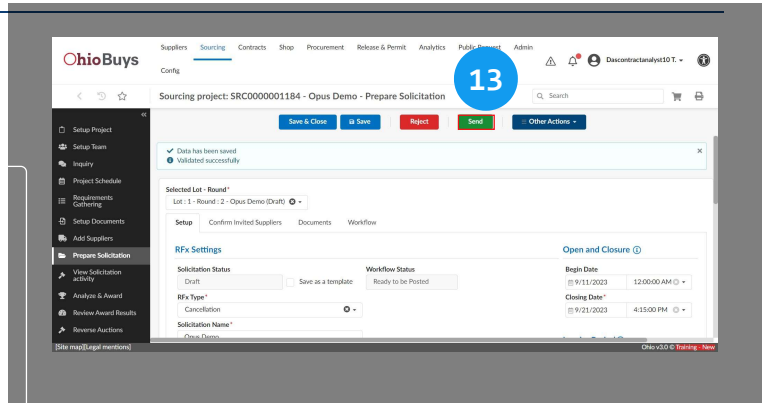
## Send a Cancellation Round

13. Click **Send**.



**Send to**

Company Name	Sending modes	User
<input checked="" type="checkbox"/> BROWN ENTERPRISE SOLUTIONS LLC	Email	Add Supplier Contact(s) Brown George
<input checked="" type="checkbox"/> CAREWORKS TECHNOLOGIES	Email	Add Supplier Contact(s) Careworks Kurt
<input checked="" type="checkbox"/> ROLKA LOUBE SALTZER ASSOCIATES	Email	Add Supplier Contact(s) Rolka Marasnet



Modify the Supplier Contacts as necessary. The listed contacts are the recipients of the cancellation notice.



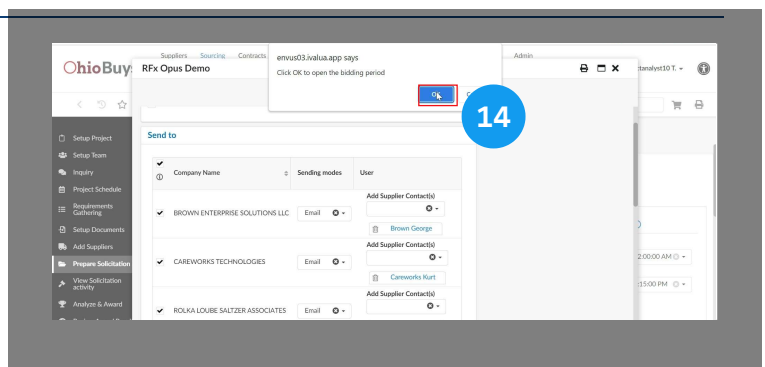
Click **Send and Close** to finish the cancellation of the solicitation and the ensuing notification.

### ▲ Note

When a solicitation is cancelled, any previously submitted responses can be accessed and reviewed by opening the desired round or lot.

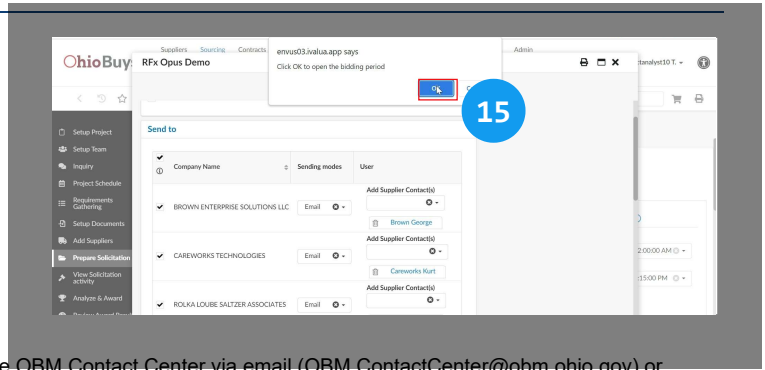
## Sourcing project: SRC0000001184 - Opus Demo - Prepare Solicitation: Ohio

14. Click **OK** to complete the process.



Sourcing project: SRC0000001184 - Opus Demo - Prepare Solicitation: Ohio

15. Click OK. This brings us to the end of our interactive simulation.



If you have questions or need additional assistance, please contact the OBM Contact Center via email ([OBM.ContactCenter@obm.ohio.gov](mailto:OBM.ContactCenter@obm.ohio.gov)) or phone (877-644-6771).

## Analyzing and Awarding a Quick Quote Solicitation

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### Topics

- Analyzing and Awarding a Quick Quote Solicitation
- Update a Purchase Requisition with a Quick Quote Award

# OhioBuys Analyzing and Awarding a Quick Quote Solicitation

Updated: 07/18/2024 08:30 PM

Version: 7.0

## 1 Purpose & Profiles

This job aid covers the process of comparing Bidder and/or Supplier responses to a quick quote solicitation and making an award.

**Profiles:** Requisitioner, Requester (with the Quick Quote Procurement User profile)

## 2 Used When

Reference this when determining the award for a quick quote solicitation.

For details on previous steps in the quick quote process, refer to the following assets:

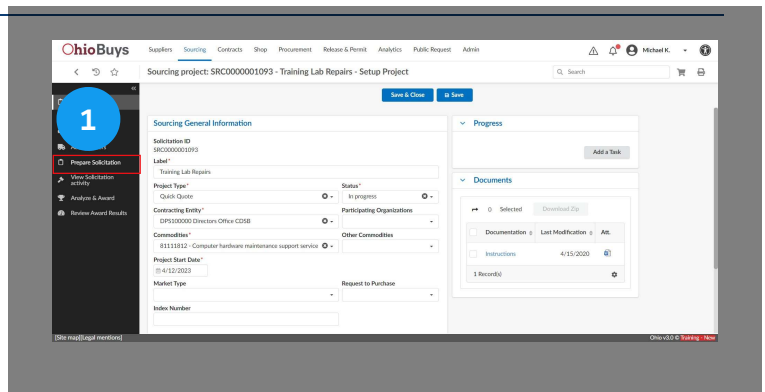
[Create a Quick Quote Solicitation](#)

[Identify Bidders and Suppliers for a Quick Quote](#)

[Release a Quick Quote Solicitation](#)

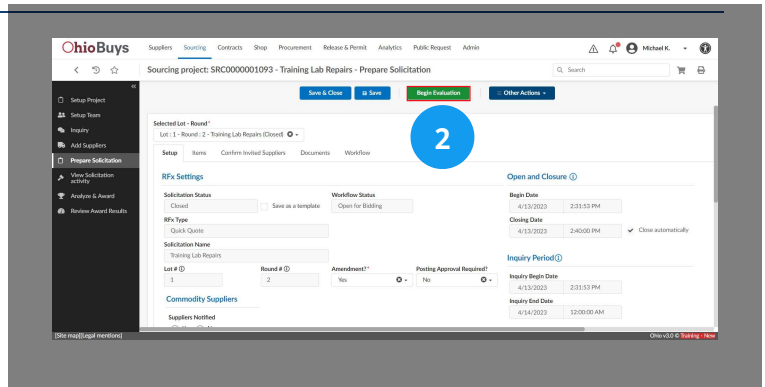
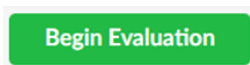
## Prepare Solicitation

1. Open the solicitation in OhioBuys and navigate to the Prepare Solicitation tab.



## Begin Evaluation

2. Click **Begin Evaluation**.

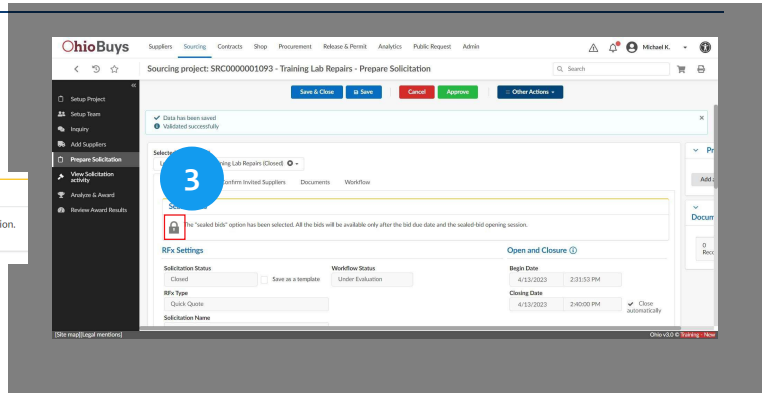


### Unseal the Bids

3. Click the Lock icon to unseal the bids.

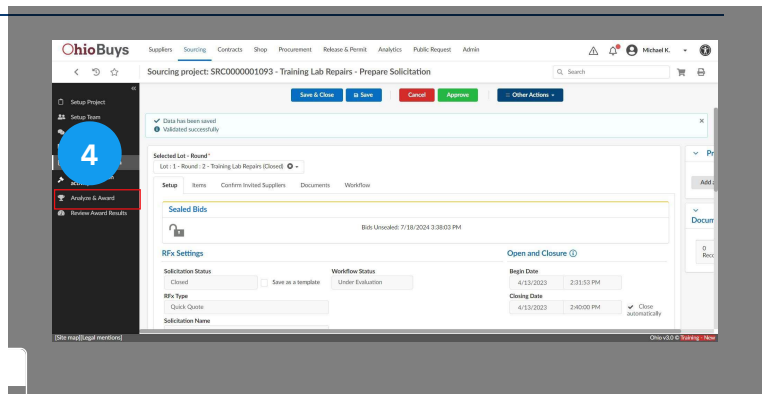
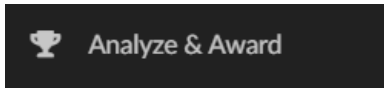
#### Sealed Bids

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.



### Analyze and Award

4. Navigate to the Analyze and Award tab.



#### ▲ Note

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 and Issuing New Lots or Rounds](#).

## Analyze and Award

From the Analyze and Award tab, users can review a summary of each submitted response, download responses, compare responses by item, and make an award.

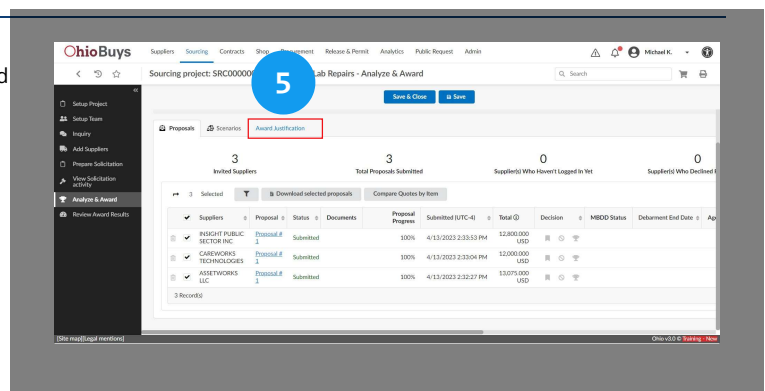
Suppliers	Proposal	Status	Documents	Proposal Progress	Submitted (UTC-4)	Total	Decision
<input type="checkbox"/> INSIGHT PUBLIC SECTOR INC	<a href="#">Proposal # 1</a>	Submitted		100%	4/13/2023 2:33:53 PM	12,800,000 USD	
<input type="checkbox"/> CAREWORKS TECHNOLOGIES	<a href="#">Proposal # 1</a>	Submitted		100%	4/13/2023 2:33:04 PM	12,000,000 USD	
<input type="checkbox"/> ASSETWORKS LLC	<a href="#">Proposal # 1</a>	Submitted		100%	4/13/2023 2:32:27 PM	13,075,000 USD	

- 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**.

## Award Justification

5. Navigate to the **Award Justification** section of the Analyze and Award tab.

Suppliers	Proposal	Status	Documents
<input type="checkbox"/> INSIGHT PUBLIC SECTOR INC	<a href="#">Proposal # 1</a>	Submitted	
<input type="checkbox"/> CAREWORKS TECHNOLOGIES	<a href="#">Proposal # 1</a>	Submitted	
<input type="checkbox"/> ASSETWORKS LLC	<a href="#">Proposal # 1</a>	Submitted	



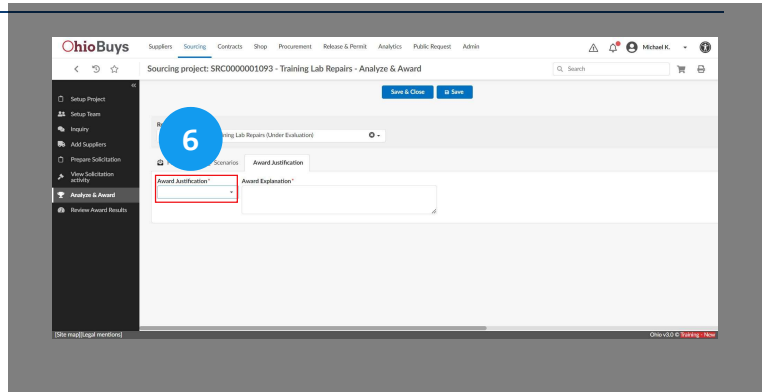


### Select Justification

6. Click the **Award Justification** selector icon and choose the option which most closely describes your reasoning for selecting the winning Bidder or Supplier.

Award Justification\*

Lowest Responsive & Responsible

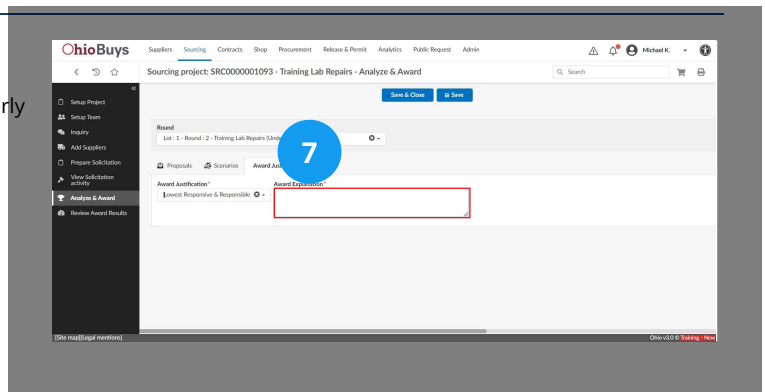


### Award Explanation

7. Add additional **Award Explanation** comments. For STS quick quotes, the values input to this field will be pulled into the quarterly STS Report produced by DAS and submitted to the Controlling Board.

Award Explanation\*

Lowest responsive and responsible

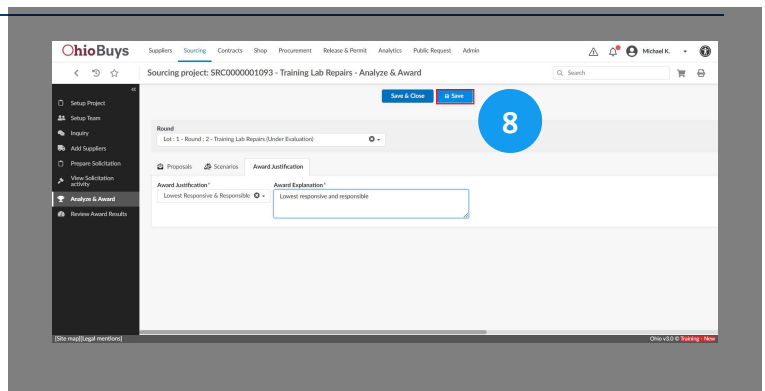


#### ▲ Note

Users must perform a quick quote prior to referencing an STS contract on a requisition. A quick quote must be in OhioBuys 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.

### Save

8. Click **Save**.



## Proposals

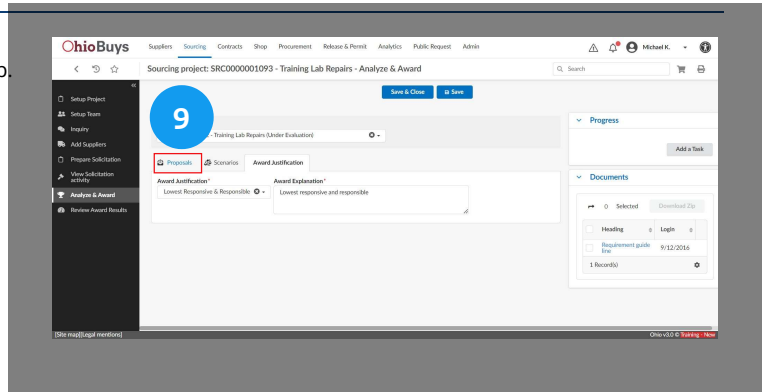
9. Return to the **Proposals** section of the Analyze and Award tab.

Round  
Lot : 1 - Round : 2 - Training Lab Repairs (Under Evaluation)

**Proposals** Scenarios Award Justification

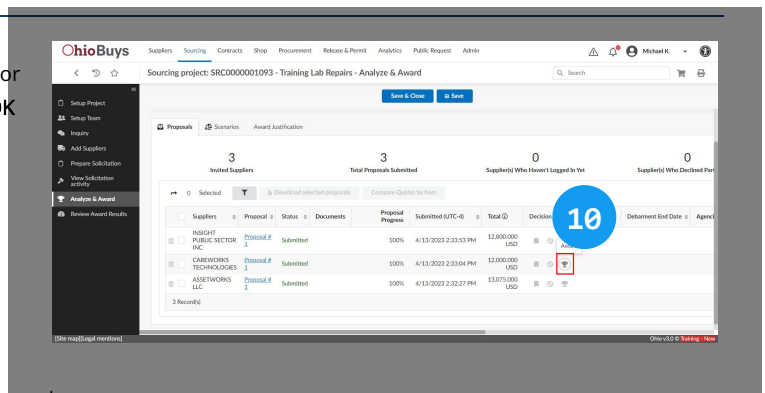
Award Justification\*  
Lowest Responsive & Responsible

Award Explanation\*  
Lowest responsive and responsible



## Award

10. Click the **Trophy** icon in the Decision column for the Bidder or Supplier for which you would like to create an award, then click **OK** in the pop-up that appears.



For details on subsequent steps in the quick quote process, refer to the following assets:

### [Update a Purchase Requisition with a Quick Quote Award](#)

If you have questions or need additional assistance, please contact the OBM Contact Center via email ([OBM.ContactCenter@obm.ohio.gov](mailto:OBM.ContactCenter@obm.ohio.gov)) or phone (877-644-6771).



# Updating a Purchase Requisition with a Quick Quote Award

Updated: 06/21/2024 05:28 PM

Version: 6.0

## Purpose & Profiles

This job aid covers the process for updating a purchase requisition containing either hosted catalog, or freeform line items with the results of a quick quote solicitation.

**Profiles:** Requisitioner, Requester (with Quick Quote Procurement User profile)

## Used When

Reference this when updating a purchase requisition containing either hosted catalog, or freeform line items after having performed a quick quote.

For details on previous steps of the Quick Quote process, please refer to the following documents:

[Create a Quick Quote Solicitation](#)

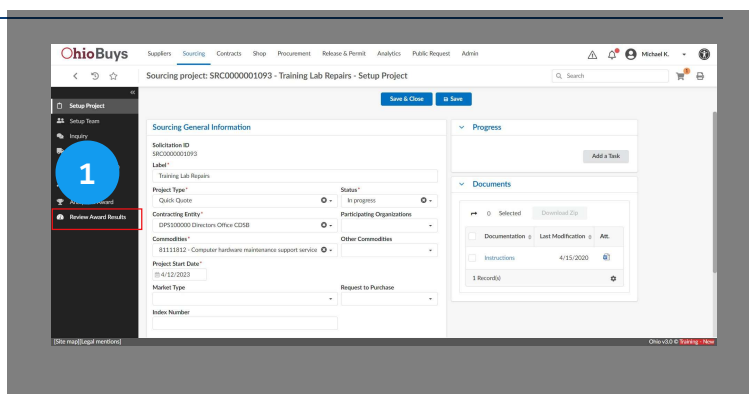
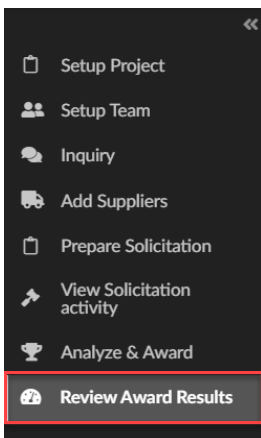
[Identify Bidders and Suppliers for a Quick Quote](#)

[Release a Quick Quote Solicitation](#)

[Award a Quick Quote Solicitation](#)

## Review Award Results

1. Open the solicitation that has been awarded and navigate to the **Review Award Results** tab.

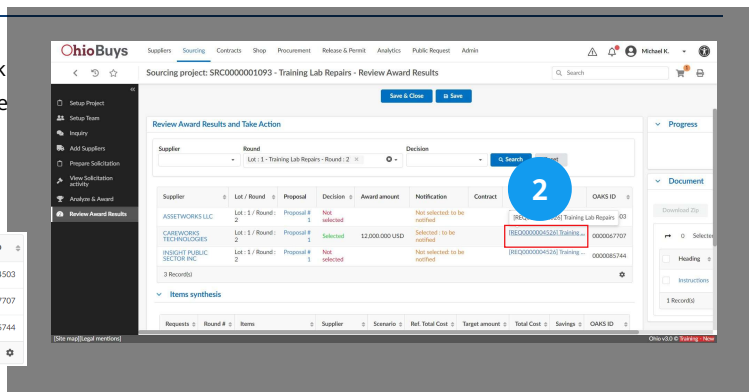


# Creating and Awarding Quick Quotes in OhioBuys Updating a Purchase Requisition with a Quick Quote Award

## Origin P.R.

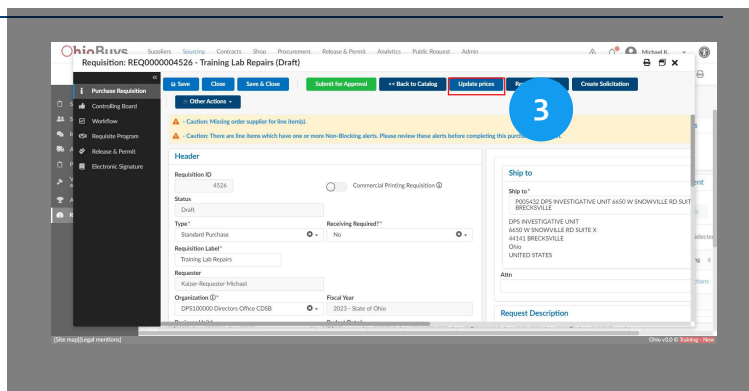
2. To update the purchase requisition associated with this quick quote with the award details, click the **Origin P.R.** hyperlink for the Bidder or Supplier you are planning to award to.

Supplier	Lot / Round	Proposal	Decision	Award amount	Notification	Contract	Origin P.R.	OAKS ID
ASSETWORKS LLC	Lot : 1 / Round : 2	Proposal # 1	Not selected		Not selected: to be notified		[REQ0000004526] Training...	0000164503
CAREWORKS TECHNOLOGIES	Lot : 1 / Round : 2	Proposal # 1	Selected	12,000,000 USD	Selected: to be notified		[REQ0000004526] Training...	0000067707
INSIGHT PUBLIC SECTOR INC	Lot : 1 / Round : 2	Proposal # 1	Not selected		Not selected: to be notified		[REQ0000004526] Training...	0000085744



## Update Prices

3. Click Update Prices.

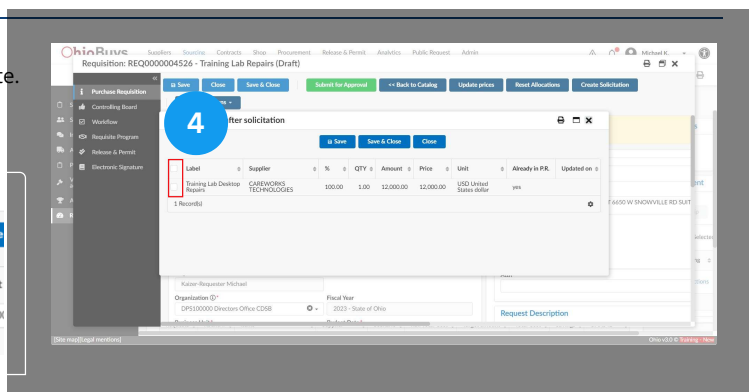


## Select Items

4. Click the **Checkbox** icons for the line items you want to update.

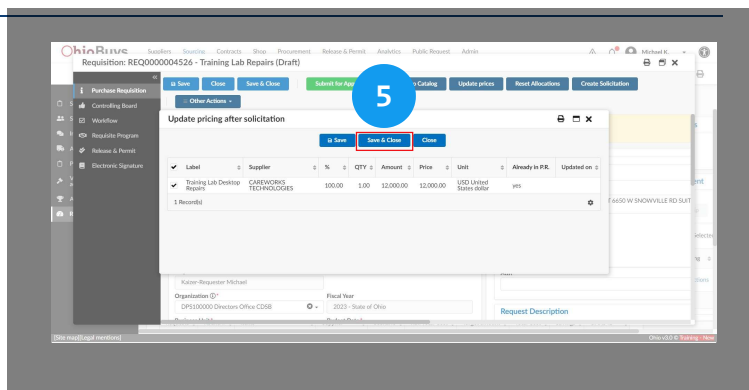
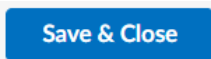
Update pricing after solicitation

Label	Supplier	%	QTY	Amount	
<input type="checkbox"/>	Liquid Disinfectant Sanitizer 80% Alc. 1 L bottles (case: 12)	LOTT INDUSTRIES INC	100.00	1.00	1,000.00



## Save & Close

5. Click **Save & Close**, then click **OK** in the pop-up that appears.

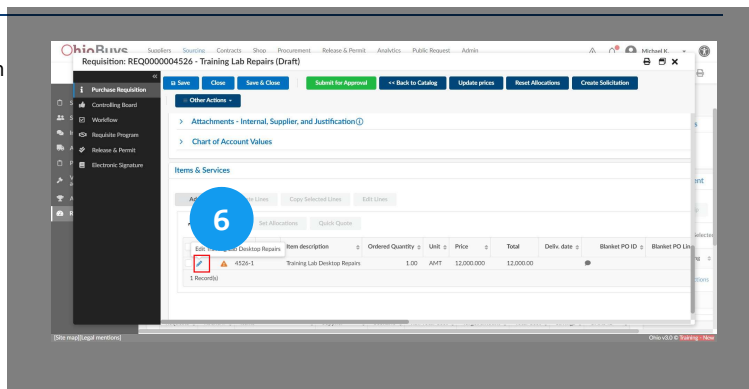


## ▲ Note

If there is any justification documentation required for the award, please attach it to the header of the purchase requisition.

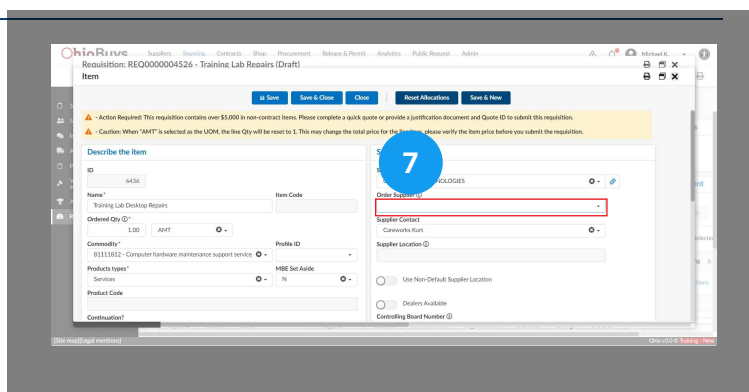
## Line Item

6. The purchase requisition has now been updated. Scroll down to the line item(s) and, click on the **Pencil** icon to open it.



## Order Supplier

7. Complete the **Order Supplier** and, if applicable, **Supplier Contact** fields.



## ▲ Note

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)

## Two-Phase Quote Contracts

If you awarding a solicitation that is for a Two-Phase Quote Contract purchase, scroll down to the More Item Information section and select the corresponding Supplier contract in the Contract field.

### ▲ Note

If there are multiple line items that need to be updated, click **Save** and then click **Apply Order Supplier/Contact to All Line Items** to automatically update the Order Supplier, Supplier Contact, Delivery Date, and Attn field for all line items from that Supplier. Note that this action will have no effect on any line items that are from another Supplier.

Apply Order Supplier/Contact To All Line Items

## Save & Close

8. Click **Save & Close**.

Save & Close

## Submit for Approval

9. Repeat this process for any remaining line items as required. When you are finished, click **Submit for Approval**.

Submit for Approval

## Notifying Suppliers

Supplier	Lot / Round	Proposal	Decision	Award amount	Notification	Contract	Origin P.R.
LOTT INDUSTRIES INC	Lot : 1 / Round : 7	Proposal # 1	Not selected		Not selected: to be notified		[REQ0000105965] Req. 2/27...
LOTT INDUSTRIES INC	Lot : 1 / Round : 7	Proposal # 2	Selected	1,000,000 USD	Selected : to be notified	Create/Update a contract	[REQ0000105965] Req. 2/27...

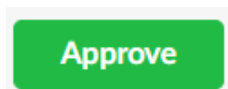
While not required, users can notify Suppliers of the results of a quick quote solicitation from OhioBuys. Navigate to the **Review Award Results** tab of the quick quote solicitation. In the **Notification** column, click on **Selected: to be notified** or **Not selected: to be notified** to generate an email notification for the selected Supplier.

The screenshot shows the 'Send an e-mail' interface. At the top, there are buttons for 'Send', 'Send & Close' (highlighted with a red box), and 'Close'. Below this is the 'Message' section with a 'Send to' dropdown. Under 'Send to', 'LOTT INDUSTRIES INC' is selected. A red box highlights the 'Add Supplier Contact(s)' dropdown menu, which is open to show 'MENKE TIM' as a contact option. Below the 'Send to' section is the 'Email' section, which includes a 'Subject' field with the text 'OhioBuys: Solicitation update: [RFX\_BUSINESS\_PROJECTS\_CODE]', an 'Attachments' section with a 'Click or Drag to add files' button, and a 'Message' section with a template: 'Dear {\$contact\_firstname} {\$contact\_lastname}. The Agency - UNDEFINED has completed evaluation of the UNDEFINED - Req. 2/27/2023 and is pleased to award this solicitation to LOTT INDUSTRIES INC. Issuance of a purchase order by an Ordering Agency will authorize work or provision of supplies under this Contract. We wish to express our appreciation to you and your company for responding to this UNDEFINED. For further details, you may log in to OhioBuys. Thank you.'

Select at least one **Supplier Contact** and then edit the notification email as needed. Attachments can be added as well as copy sent for personal records. Click **Send & Close** to send the email.

### ▲ Note

Once the purchase requisition has been processed into a purchase order, users should move the quick quote from an 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.

If you have questions or need additional assistance, please contact the OBM Contact Center via email ([OBM.ContactCenter@obm.ohio.gov](mailto:OBM.ContactCenter@obm.ohio.gov)) or phone (877-644-6771).

## Creating a New Round

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### Topic

- Create and Issue New Lots and Rounds



# Ohio OhioBuys Creating and Issuing New Lots and Rounds

Updated: 01/07/2025 06:09 PM

Version: 5.0

## 1 Purpose & Profiles

This job aid covers the process for creating new lots and rounds for a solicitation in OhioBuys.

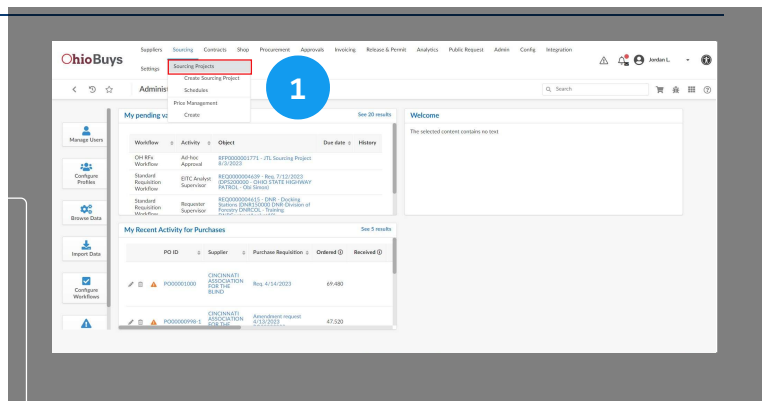
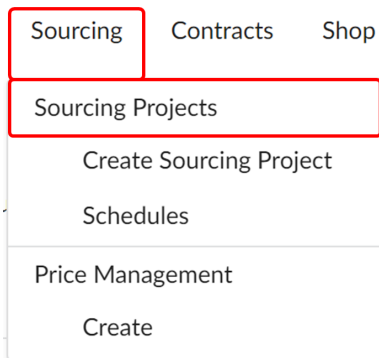
**Profiles:** Contract Analyst, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, Agency Contract Analyst, Procurement Manager, Agency Sourcing Associate

## Used When

Reference this when creating a new lot or round for a solicitation in OhioBuys.

## Navigate to Sourcing Projects


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



## Search Sourcing Projects

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.

### Note

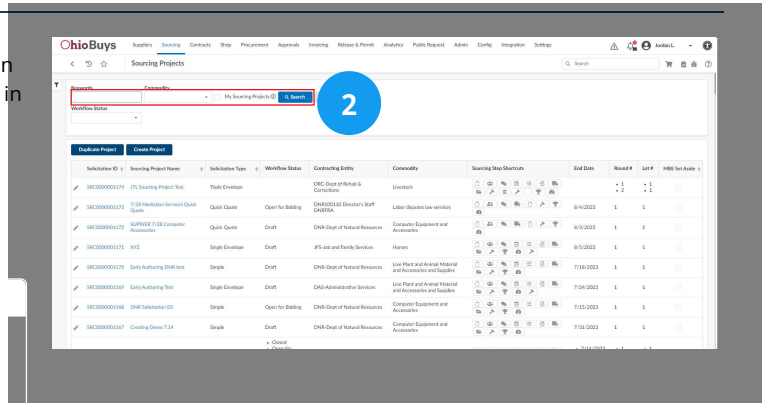
You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFX type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional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

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Is a template

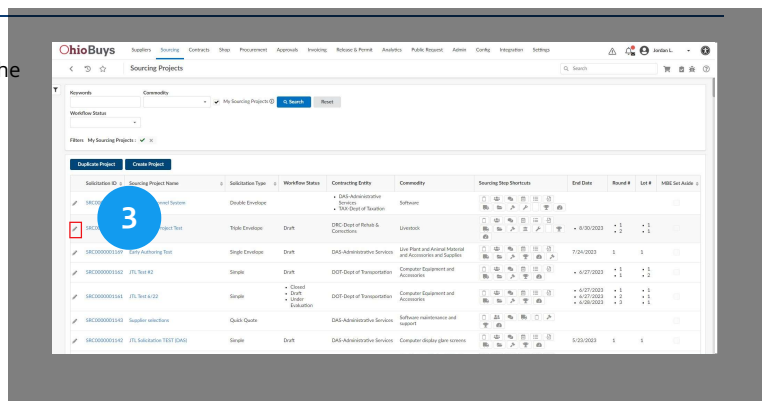
**Contact**

**Supplier**



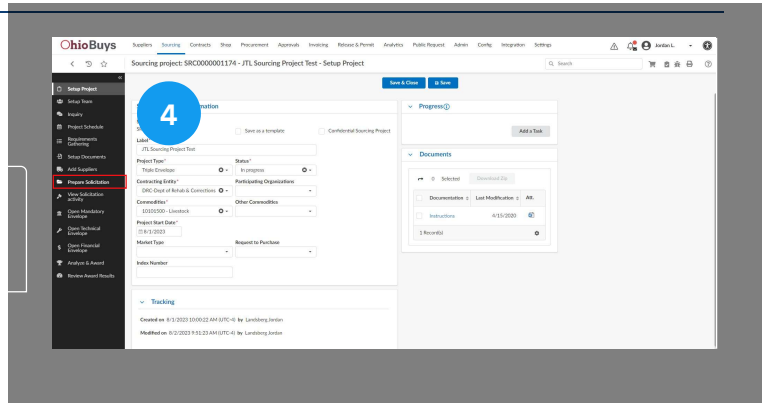
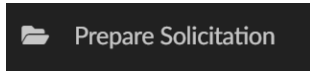
## Pencil Icon

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



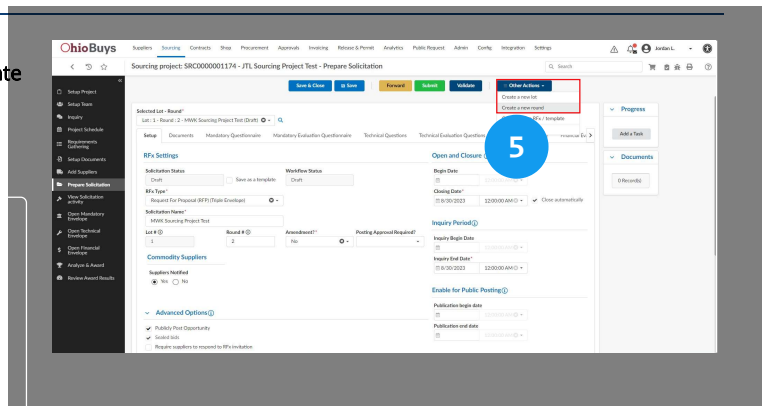
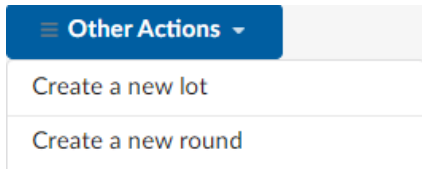
## Prepare Solicitation

4. Navigate to the Prepare Solicitation tab.



## Create a New Lot / Create a New Round

5. Click **Other Actions** and select either **Create a new lot** or **Create a new round**.

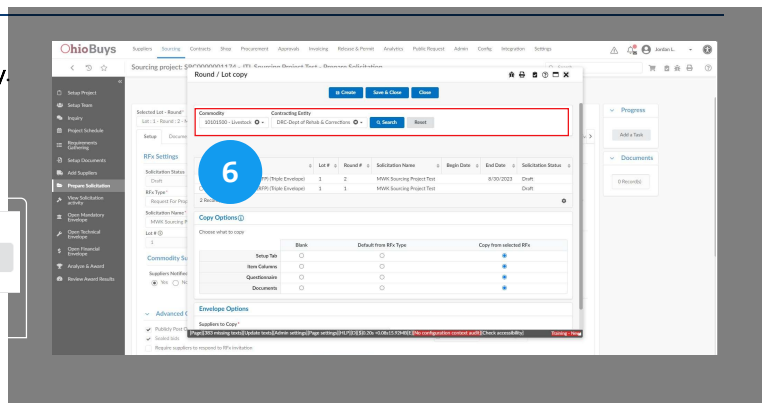
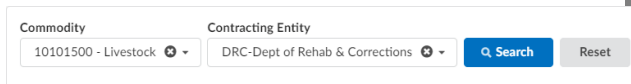


**Note**

Once you have selected which you would like to create, the process for creating a new lot or round is the same.

## Commodity and Contracting Entity

6. If necessary, update the **Commodity** or the **Contracting Entity**. These fields both carry over from the original sourcing project.



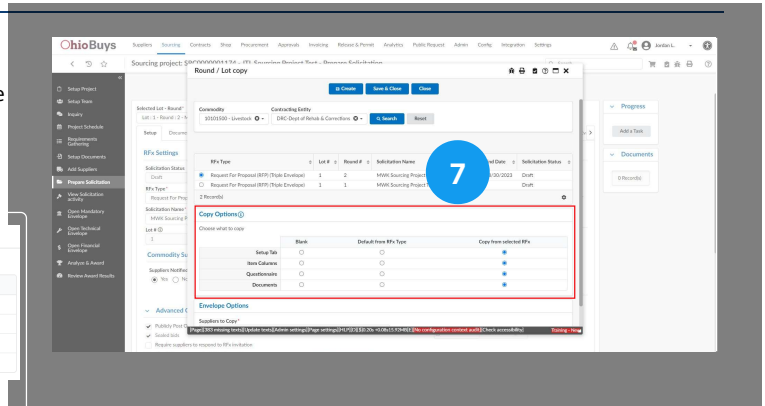
### Copy Options

7. Confirm the options that should carry over from the original RFX. You can also choose to leave a section blank, or populate the section with the default from the RFX type.

#### Copy Options

Choose what to copy

	Blank	Default from RFX Type	Copy from selected RFX
Setup Tab	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Item Columns	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Questionnaire	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Documents	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

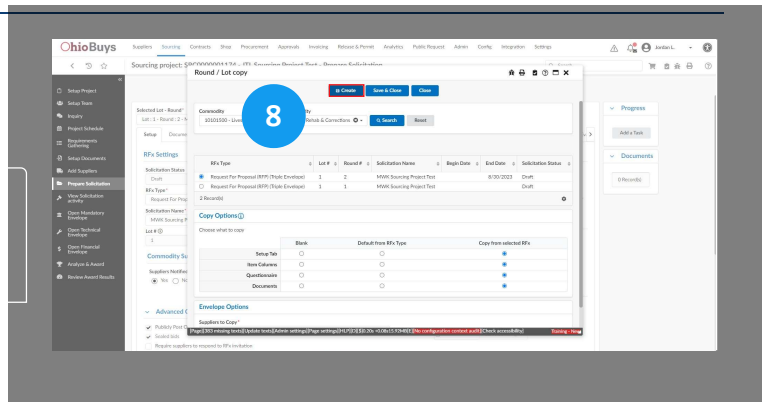


#### Note

The **Setup Tab** selector will determine whether or not the Advanced Options from the original RFX carry over. Users should carefully consider whether to retain this field.

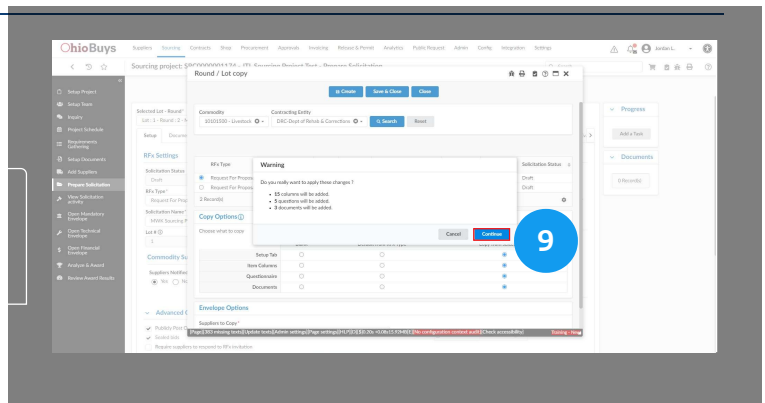
### Create

8. Click **Create**.



### Continue

9. Click **Continue**.



**Note**

When creating a new round for a double or triple envelope solicitation, the sourcing responsible can elect to copy over the proposal status from the previous round or un-validate the proposals, and can choose to include only Suppliers with accepted proposals or all invited Suppliers.

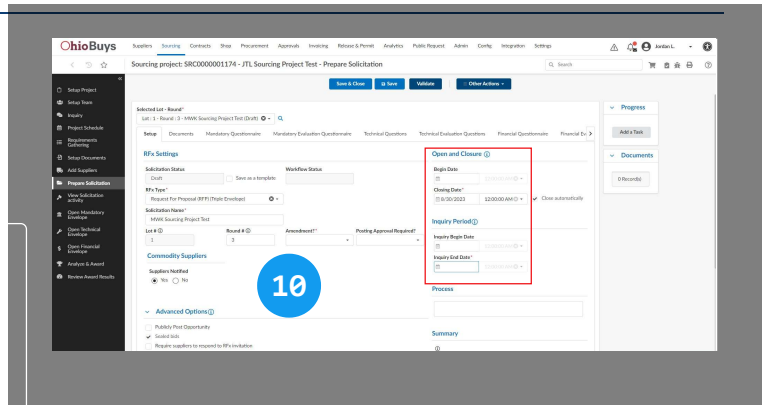
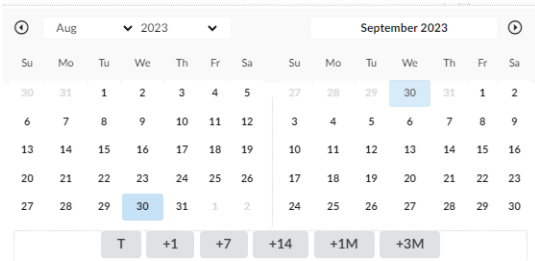
**Envelope Options**

**Suppliers to Copy\***

Only suppliers with accepted proposals

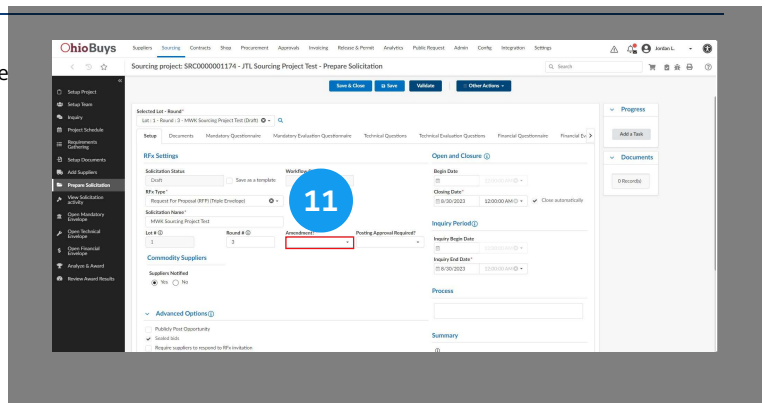
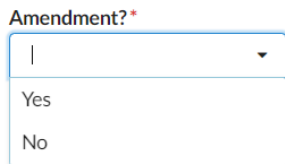
**Open & Closure and Inquiry Dates**

10. A new lot or round has been created. Make any necessary updates to the **Open & Closure** and **Inquiry Dates** by clicking the fields and selecting the date(s).



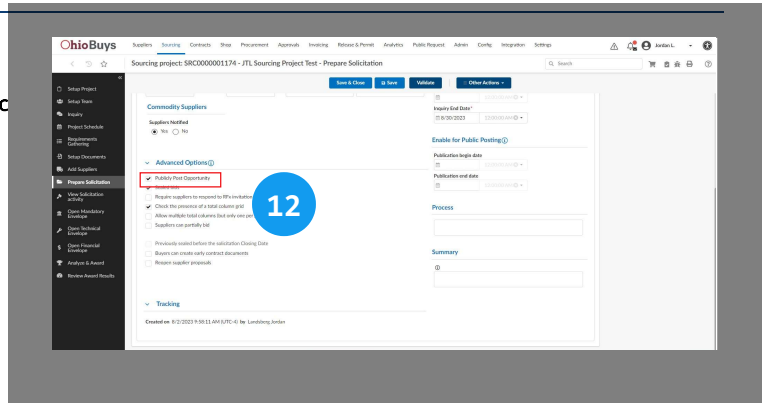
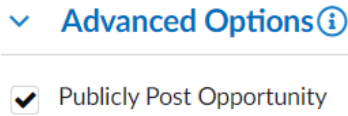
**Amendment**

11. Update the **Amendment** field to **Yes** or **No** depending on the reason the new round or lot is being created by clicking the field.



## Public Post Opportunity

12. Scroll down on the solicitation. In the **Advanced Options** section, if you are not posting clarifications be sure that the **Public Post Opportunity** checkbox is checked.

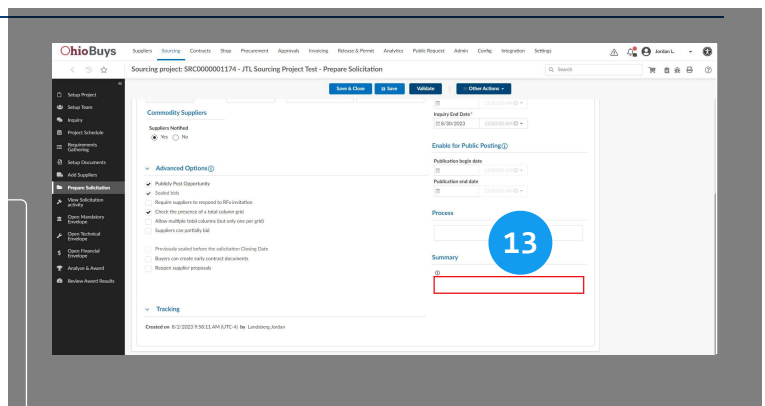


## Summary

13. Enter the reason for the new lot or round in the **Summary** field.

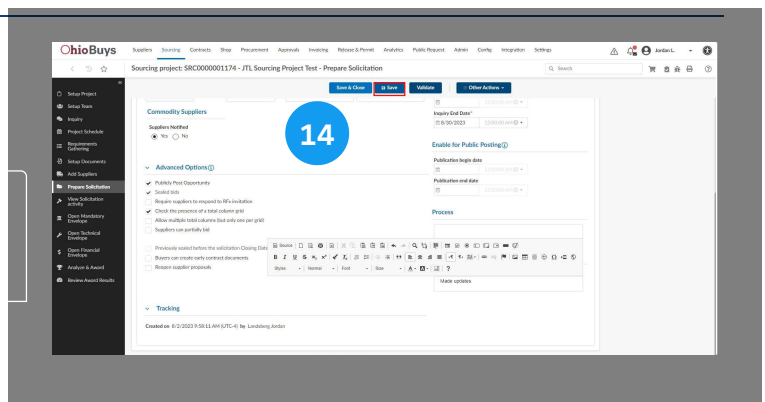
### Summary

Summary



## Save

14. Click **Save**.



▲ **Note**

If you are creating a new lot, you should indicate whether or not the lot is a clarification using the **Is a Clarification** checkbox

If the lot is a clarification, the Sourcing Responsible user is able to manually close the solicitation prior to the scheduled close date once clarifications have been received

When conducting Agency Competitive Selection purchases in OhioBuys, the need to conduct clarifications with a supplier(s) may arise. Users should create new lots to conduct these clarifications, not new rounds. Once the required information has been gathered from the applicable supplier(s), users should proceed with awarding the round that suppliers originally submitted their proposals for, not the lot that was used to conduct the clarification.

This will ensure that the resulting contract is tied to a solicitation that meets the quoting requirements.

If the Inquiry Begin Date is not populated by the user, it will automatically match the solicitation posting date once the solicitation is open for bidding, however, users must always manually input the Inquiry End Date

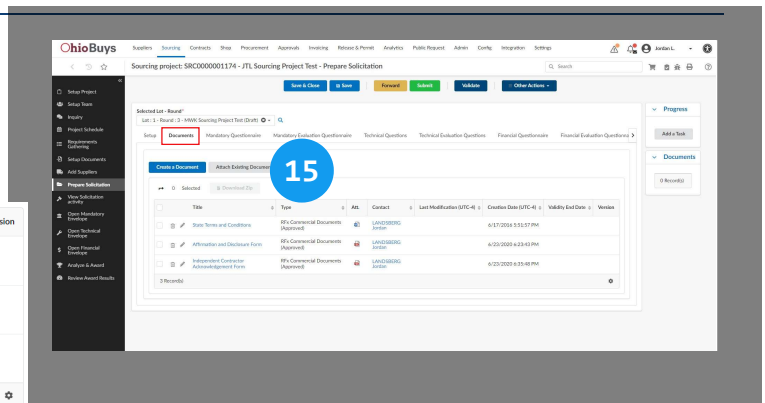
If not populated by the user, the Publication Begin Date will automatically populate to match the Begin Date of the solicitation, and Publication End Date will automatically populate with a date one year after the solicitation closing date

**Documents**

15. Navigate to the **Documents** tab and upload any new amendment documents.

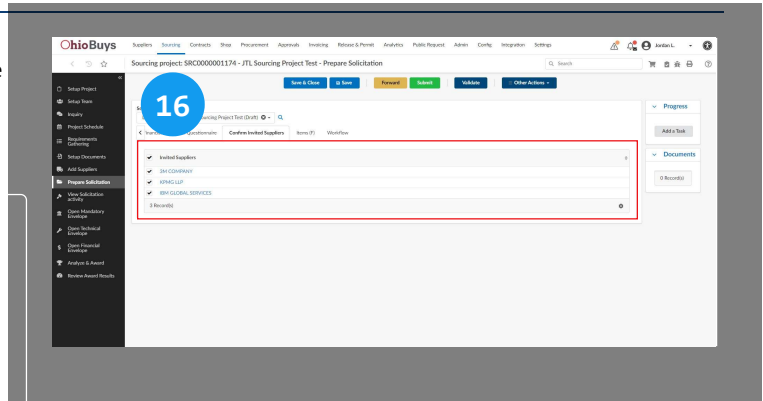
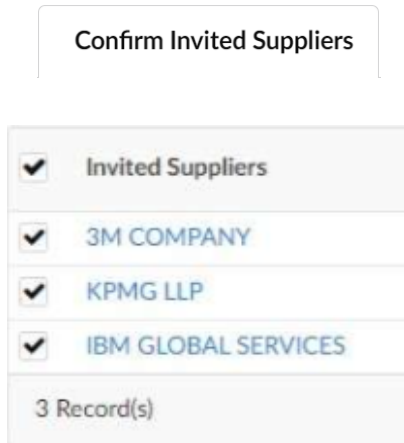
	Title	Type	Att.	Contact	Last Modification (UTC-4)	Creation Date (UTC-4)	Validity End Date	Version
<input type="checkbox"/>	State Terms and Conditions	RFX Commercial Documents (Approved)		LANDSBERG Jordan		6/17/2016 5:51:57 PM		
<input type="checkbox"/>	Affirmation and Disclosure Form	RFX Commercial Documents (Approved)		LANDSBERG Jordan		6/23/2020 6:23:43 PM		
<input type="checkbox"/>	Independent Contractor Acknowledgement Form	RFX Commercial Documents (Approved)		LANDSBERG Jordan		6/23/2020 6:35:48 PM		

3 Record(s)



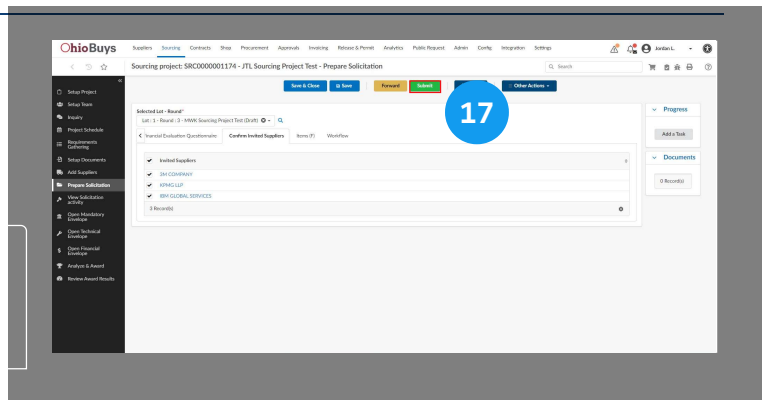
## Confirm Invited Suppliers

16. Navigate to the **Confirm Invited Suppliers** tab and select the Suppliers you wish to include in the new lot or round.



## Submit

17. Continue to update the solicitation as necessary to capture the details of the new lot or round. When you are finished, click **Submit**.



### ▲ Note

- Issuing a new round or lot will retrigger the solicitation approval workflow.
- If a new lot or 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.

If you have questions or need additional assistance, please contact the OBM Contact Center via email ([OBM.ContactCenter@obm.ohio.gov](mailto:OBM.ContactCenter@obm.ohio.gov)) or phone (877-644-6771).



## Answering Supplier Questions

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### Topics

- Answer Supplier Questions

# Ohio OhioBuys Answering Supplier Questions (Inquiry)

Updated: 07/31/2024 02:37 PM

Version: 8.0

## 📌 Purpose & Profiles

This job aid covers the process of answering Supplier questions.

**Profiles:** Contract Analyst, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, Agency Contract Analyst, Procurement Manager, Agency Sourcing Associate

## 📖 Used When

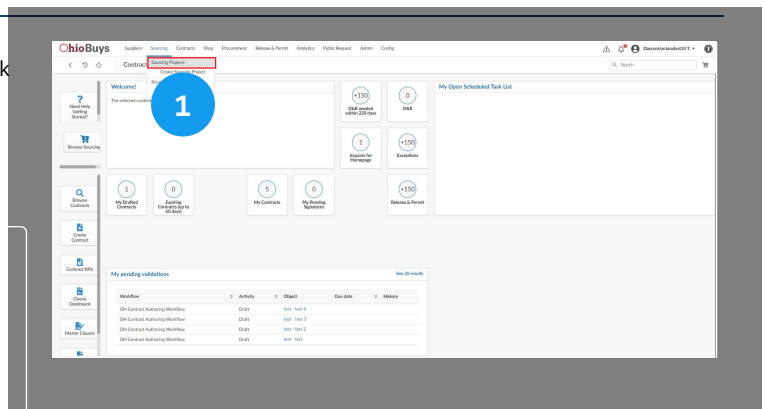
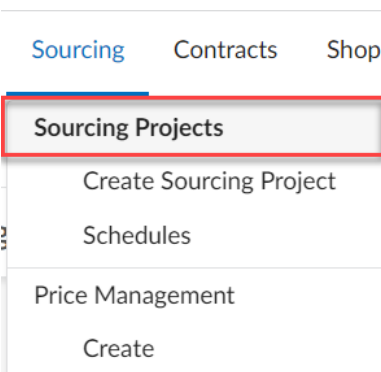
Reference this when needing to answer Supplier questions.

### ▲ Note

When a Bidder or Supplier submits an inquiry, the user responsible for the solicitation will receive an email notification and can view the question. They then can "unlock" the question for edit by forwarding. They can forward to any teammate on the team.

## Navigate to Sourcing Projects

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

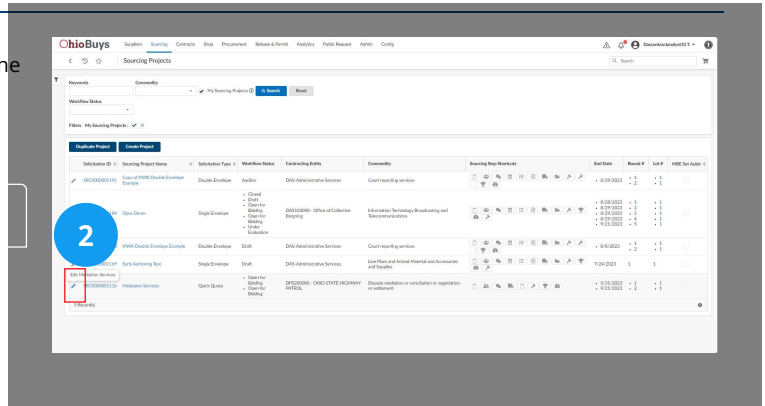


# Creating and Awarding Quick Quotes in OhioBuys Answering Supplier Questions (Inquiry)

## Open Solicitation

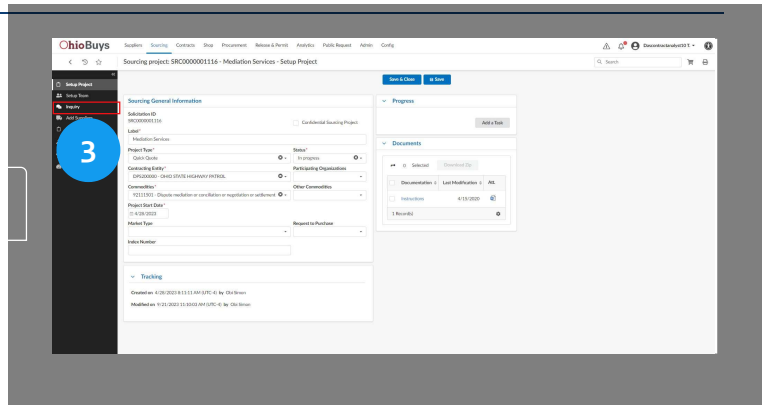
2. Open the sourcing project you would like to edit by clicking the Pencil icon.

Pencil Icon: 



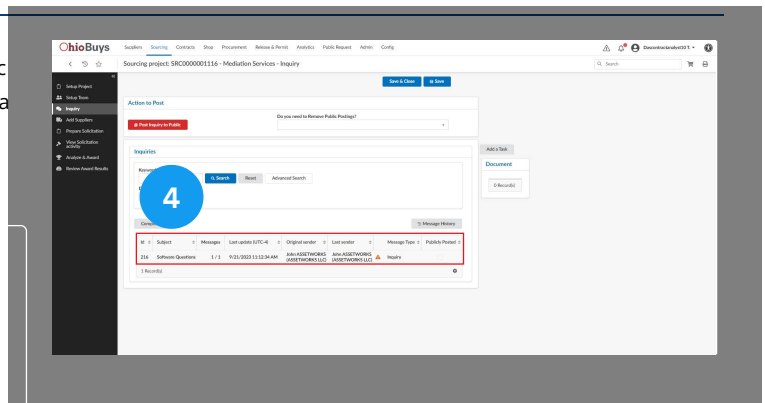
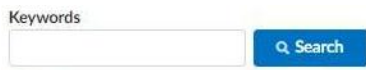
## Navigate to the Inquiry Tab

3. Navigate to the Inquiry tab.




## Review Submitted Inquiries

4. All Supplier-submitted inquiries are listed. Search for specific questions by using the **Keywords** search field. Click anywhere on a question line to open the question.



### ▲ Note

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, Sourcing Project Start Date, Solicitation Date Range, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the More Filters (  ) icon.

## Begin the Inquiry Response Process

5. The question is displayed. To respond to the question, a user must first click the **Forward** icon.

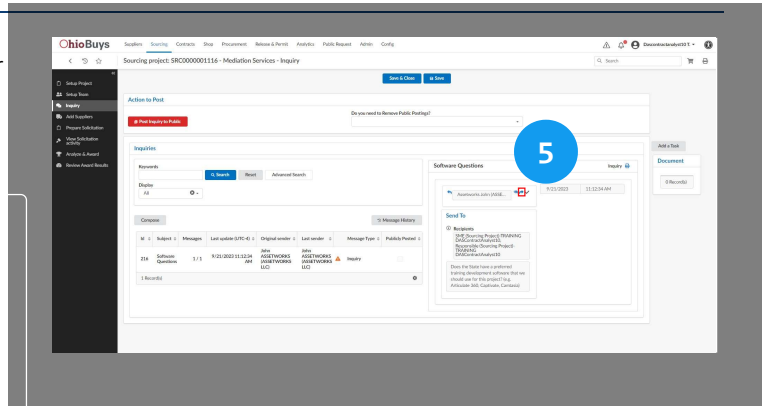
Assetworks John (ASSE...)

### Send To

**Recipients**

SME (Sourcing Project)-TRAINING  
DASContractAnalyst10,  
Responsible (Sourcing Project)-  
TRAINING  
DASContractAnalyst10

Does the State have a preferred training development software that we should use for this project? (e.g. Articulate 360, Captivate, Camtasia)



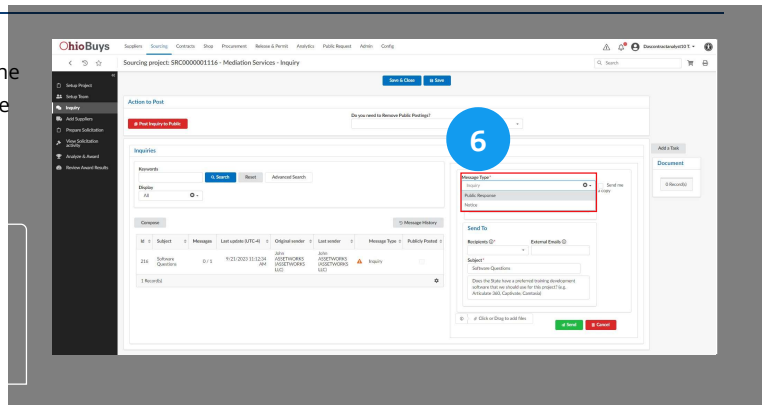
Forward Icon:

## Update Inquiry to a Public Response

6. Select **Public Response** for the **Message Type**. This will post the Supplier's question publicly so that other Suppliers are able to see the State's response.

Message Type\*

- Inquiry
- Public Response
- Notice

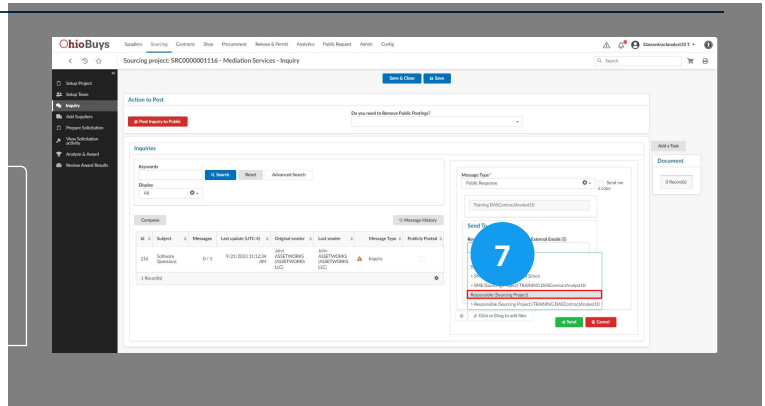


## Sending an Inquiry to the Responsible User

7. Select the **Responsible** user in the **Recipients** field.

Recipients ⓘ\*

Responsible (Sourcing Project)



## Update Supplier Inquiry

8. Update the Supplier's question as necessary to remove any sensitive or identifying information as well as correct any grammatical mistakes. Click **Send** when finished.

### Send To

Recipients ⓘ\*

Responsible (Sourcing Project)

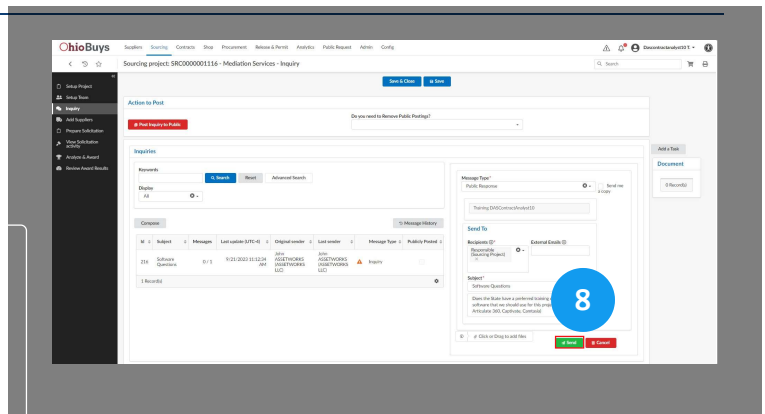
External Emails ⓘ

Subject\*

Software Questions

Does the State have a preferred training development software that we should use for this project? (e.g. Articulate 360, Captivate, Camtasia)

Send

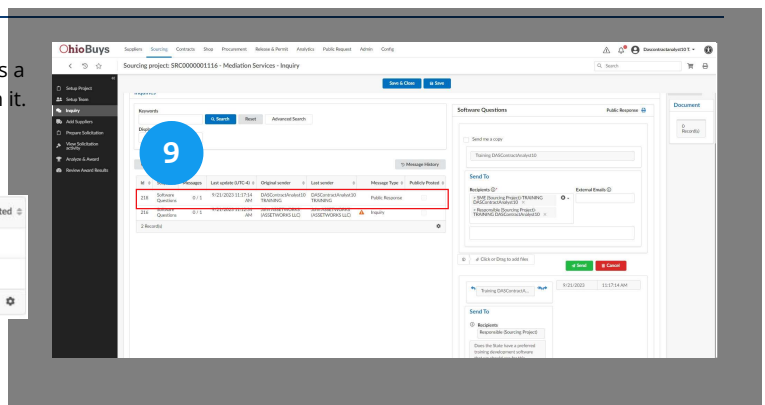


## Select Forwarded Message

9. The forwarded message will now appear in the inbox and has a message type of a **Public Response**. Click on the message to open it.

Id	Subject	Messages	Last update (UTC-4)	Original sender	Last sender	Message Type	Publicly Posted
218	Software Questions	0 / 1	9/21/2023 11:17:14 AM	DASContractAnalyst10 TRAINING	DASContractAnalyst10 TRAINING	Public Response	<input type="checkbox"/>
216	Software Questions	0 / 1	9/21/2023 11:12:34 AM	John ASSETWORKS (ASSETWORKS LLC)	John ASSETWORKS (ASSETWORKS LLC)	Inquiry	<input type="checkbox"/>

2 Record(s)

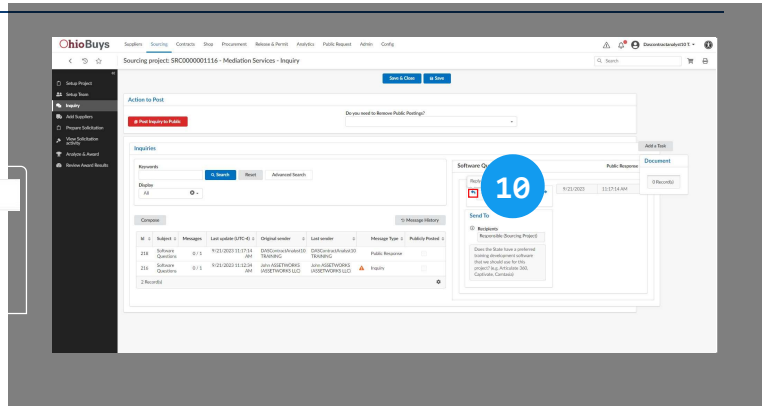


## Continue the Inquiry Response

10. Navigate to the opened message and click the **Reply** icon.


218	Software Questions	0 / 1	9/21/2023 11:17:14 AM	DASContractAnalyst10 TRAINING	DASContractAnalyst10 TRAINING	Public Response
-----	--------------------	-------	-----------------------	-------------------------------	-------------------------------	-----------------

Reply Icon : 





## Answer the Supplier Inquiry


11. Enter the answer/response to the Supplier question in the free text entry field.

**Training Software?** Public Response 

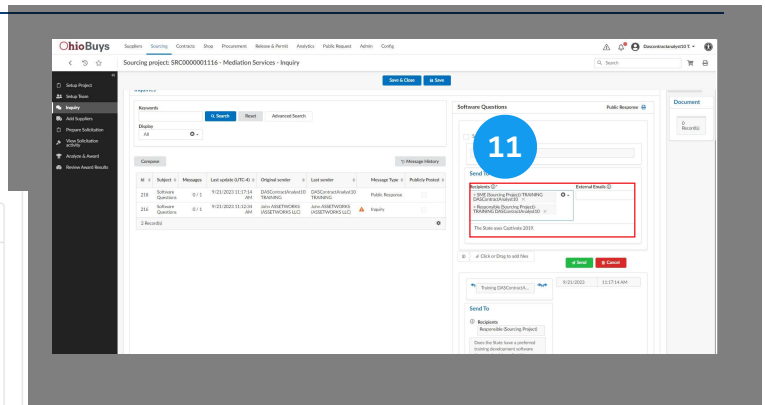
Send me a copy

**Send To**

Recipients \*  External Emails 

> Responsible (Sourcing Project)- TRAINING DASContractAnalyst25 

Click or Drag to add files



### ▲ Note

If you are adding an attachment as part of a response to an inquiry, then embed the attachment in the free text entry field.

## Select Recipients

12. Select the **Recipients** of the response. You can choose internal contacts on the project team and Supplier contacts.

### Recipients

- > SME (Sourcing Project)-TRAINING DASContractAnalyst10 ✕
- > Responsible (Sourcing Project)-TRAINING DASContractAnalyst10 ✕

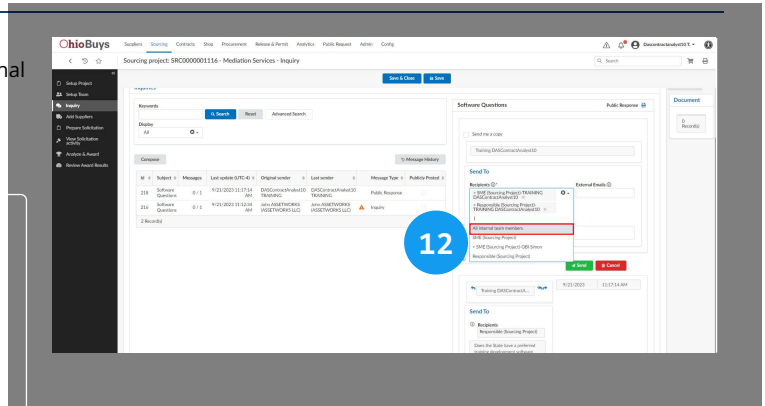
---

All internal team members

SME (Sourcing Project)

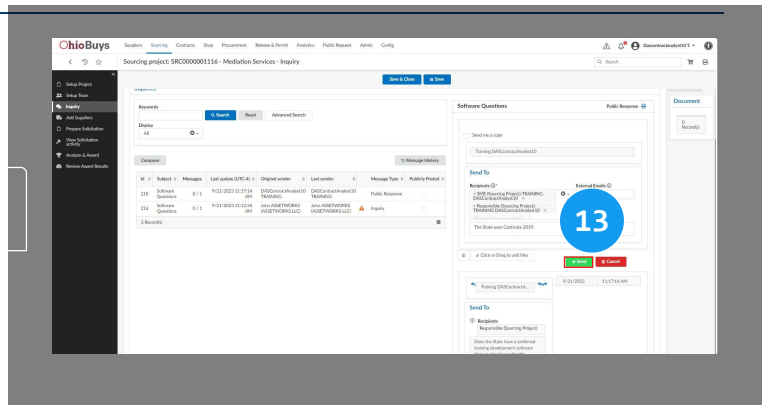
> SME (Sourcing Project)-OBI Simon

Responsible (Sourcing Project)



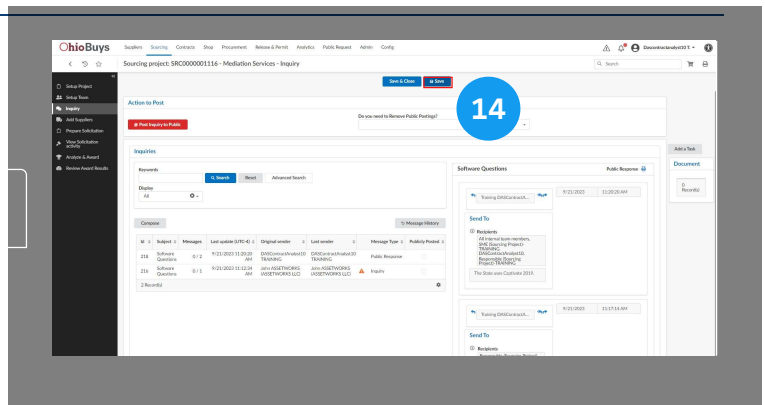
## Distribute Inquiry Answers

13. Click **Send** to distribute your reply.



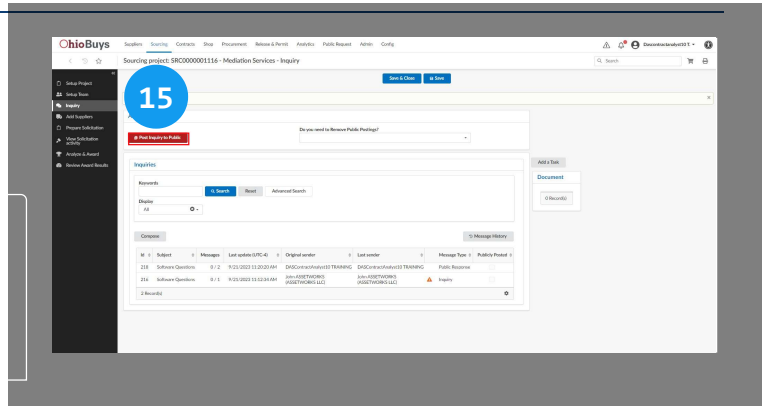
## Save Inquiries

14. Click **Save**.



Post Inquiry Answers to the Public

15. Click **Post Inquiry to Public**. This will post publicly all of the questions and answers with the public response type.



▲ **Note**

Inquiry responses that have been posted to the public can be marked as replied.

1. In the **Inquiries** header, click the Inquiry line item.

**Inquiries**

Keywords:

Display:

Subject	Messages	Last update (UTC-4)	Original sender	Last sender	Publicly Posted
Question	0 / 2	8/3/2020 11:00:35 PM	KYLE BAILEY	KYLE BAILEY	<input checked="" type="checkbox"/>
Question	0 / 1	8/3/2020 10:59:54 PM	KYLE BAILEY	KYLE BAILEY	<input type="checkbox"/>
Question	0 / 1	8/3/2020 10:58:20 PM	Dipjan KARUMSI (KPMG LLP)	Dipjan KARUMSI (KPMG LLP)	<input type="checkbox"/>
Public Portal Confir	0 / 1	8/3/2020 10:56:35 PM	Will ROBINSON (KPMG LLP)	Will ROBINSON (KPMG LLP)	<input type="checkbox"/>

2. In the **Subscription details** header, click the **Checkmark** ( ✓ ) icon to mark the inquiry as replied.

**Subscription details**

Kumar Induri Naresh (EX...

**Send To**

① **Recipients**

Responsible (Sourcing Project)-LEWIS Kimberly

Could you please confirm whether the version is **Standard** or **Ultimate**?"



▲ **Note**

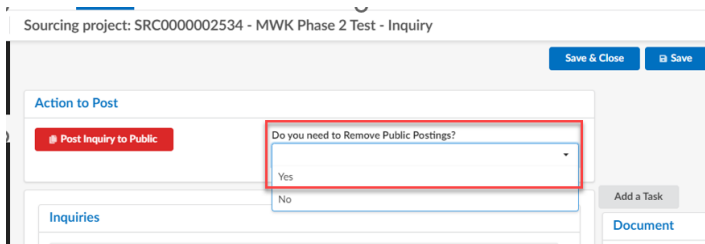
Any responses posted for a previous round of a solicitation will remain visible to the public in the event that subsequent rounds are created.

For solicitations that have not been publicly posted, the sourcing responsible can follow the above process to respond to any Supplier inquiries. The responses will display in the solicitation overview for all Suppliers that have been invited to the solicitation.

▲ **Note**

Inquiry responses that have been posted to the public can be removed if required.

1. In the **Do you need to remove public postings** drop-down menu, select **Yes**.



2. A new **BPM Public Inquiries - Please Save After Populating** drop-down will appear. Select the post(s) that you want to remove from the drop-down menu.



3. Click **Save**.



4. Click **Remove Public Posting**.



If you have questions or need additional assistance, please contact the OBM Contact Center via email ([OBM.ContactCenter@obm.ohio.gov](mailto:OBM.ContactCenter@obm.ohio.gov)) or phone (877-644-6771).

## Updating a Purchase Requisition with an Existing Quick Quote

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### Topics

- Updating a Purchase Requisition with a Quick Quote Award



# Updating a Purchase Requisition with an Existing Quick Quote

Updated: 06/21/2024 05:30 PM

Version: 4.0

## 1 Purpose & Profiles

This job aid covers the process of linking an existing quick quote to a new purchase requisition.

**Profiles:** Requisitioner, Quick Quote Procurement User

## 2 Used When

Reference this when there is a need to either create a new copy of the purchase requisition that references a previously conducted quick quote, or if a quick quote was created without an initial purchase requisition.

### ▲ Note

Note that the process outlined in this section should generally 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. In that scenario, users should duplicate the original purchase requisition prior to completing the steps below.

This process may also be used to connect a new purchase requisition to an existing quick quote. In this scenario, users will not be able to update item prices with the Update Prices button at the conclusion of the quick quote, and will need to manually update the prices on each item according to the winning proposal response.

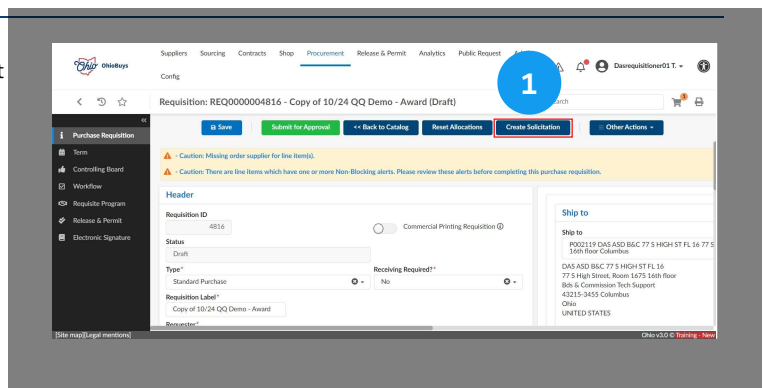
For instructions on how to duplicate a purchase requisition, please refer to the following material in Opus.

## Duplicate a Purchase

## Create Solicitation

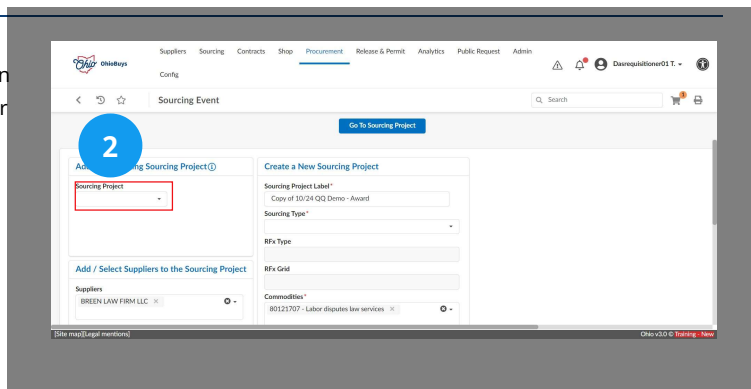
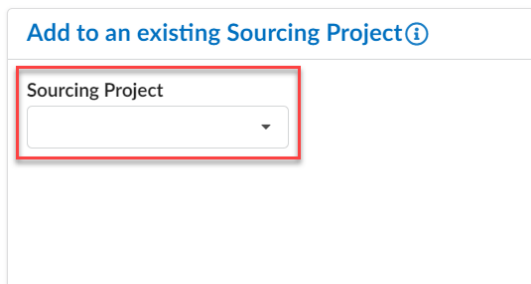
1. From the purchase requisition that you would like to connect to a quick quote, click **Create Solicitation**.

Create Solicitation



## Add to an Existing Sourcing Project

2. Under the **Add to an existing Sourcing Project** header, click on the **Sourcing Project** field and 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,



### ▲ Note

After choosing the sourcing project, you will have the option to select a specific lot or round from the solicitation, and/or a specific item grid.

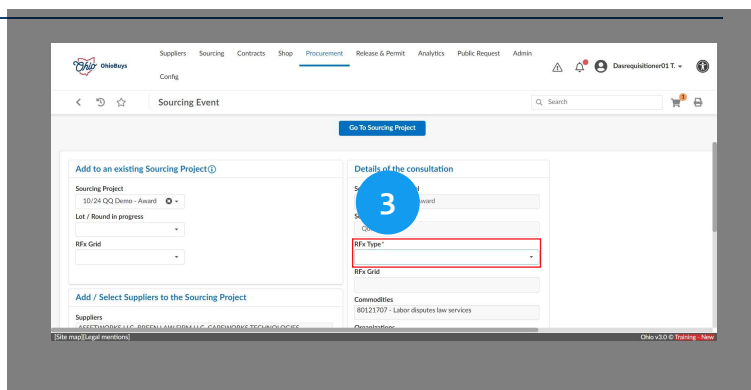
Lot / Round in progress

RFx Grid

## RFx Type

3. Update the **RFx Type** field by selecting **Quick Quote** from the drop-down menu.

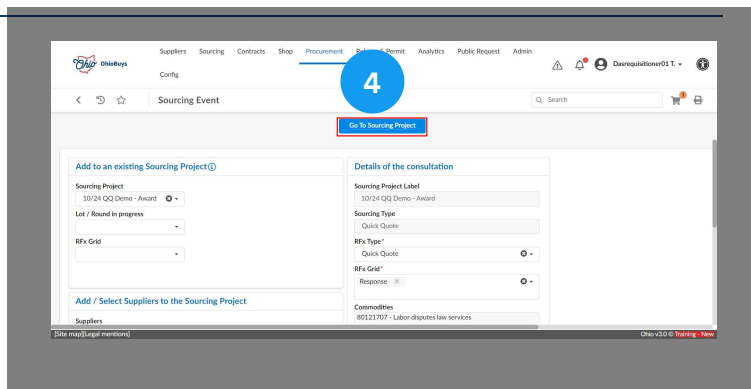
RFx Type\*



## Go to Sourcing Project

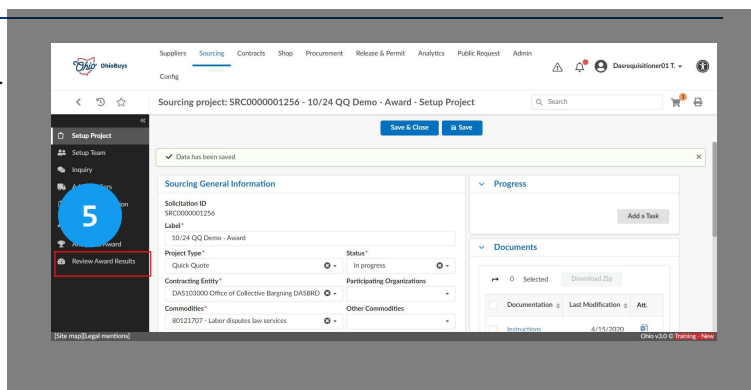
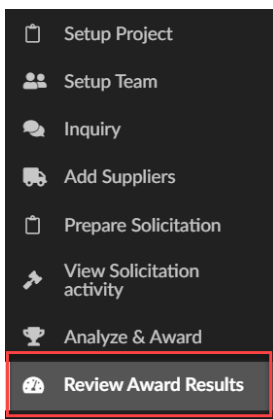
4. Click **Go to Sourcing Project**.

**Go To Sourcing Project**



## Review Award Results

5. On the solicitation, navigate to the **Review Award Results** tab.

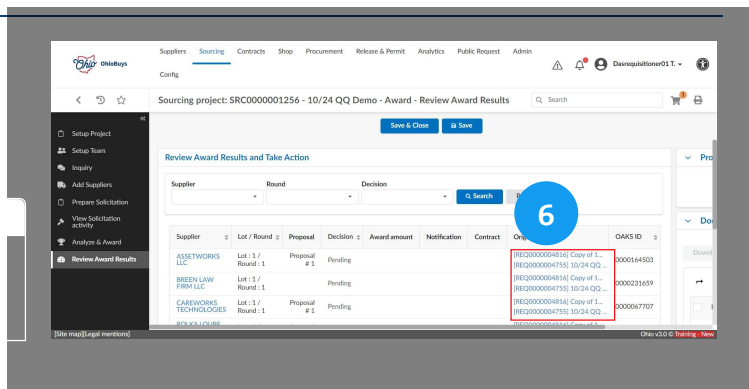


## Origin P.R.

6. Select the **hyperlink** to the new purchase requisition in the **Origin P.R.** column.

### ▲ Note

If the solicitation has already been awarded, you should select it on the row that corresponds to the winning bid. Otherwise you can select it in any row.



### Origin P.R.

[\[REQ000004816\] Copy of 1...](#)

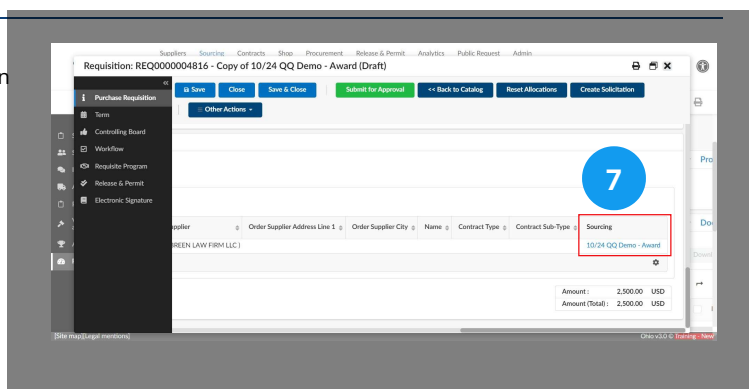
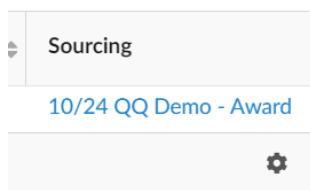
[\[REQ000004755\] 10/24 QQ ...](#)

[\[REQ000004816\] Copy of 1...](#)

[\[REQ000004755\] 10/24 QQ ...](#)

## View the Link

7. The linked solicitation will now appear in the **Sourcing** column of the line item(s) on the new purchase requisition.



If you have questions or need additional assistance, please contact the OBM Contact Center via email ([OBM.ContactCenter@obm.ohio.gov](mailto:OBM.ContactCenter@obm.ohio.gov)) or phone (877-644-6771).

## A Note on Continuation Purchases

### Guidance for Flagging Continuation Purchases

Item

Save
Save & Close
Close

MBE Set Aside  
N

Type  
Product

Delivery Date\*  
3/6/2023

Product Code  
CRP30485-1

Continuation Comment

Continuation Order

Continuation?  
 Yes  
 No

If a purchase is a continuation of a previous purchase off of an STS contract, users must indicate this on the line item(s). Click **Yes** in the **Continuation?** Field on each line item that is part of a continuation purchase. This will allow you to enter any relevant comments in the Continuation Comments field.

If the previous purchase was made in OhioBuys, search for the PO number in the **Continuation Order** field and select it from the drop-down menu. Then click **Save**.

- Users should also attach any supporting documentation referencing the original solicitation and/or purchase in the **Attachments** section on the purchase requisition header.
- A continuation on a purchase originating from an STS contract where the initial solicitation and purchase were made outside of OhioBuys will not show up in the Continuation Order field. This will cause the new PR to show up on the STS exception report.
- Classifying a purchase as a continuation will not allow an agency to bypass the STS purchase requirement that requires the solicitation of multiple suppliers.

## Additional Quick Quote Materials

### Topics

- Purchasing from a Two-Phase Quote Contract
- Creating a Purchase Requisition when Awarding a Completed Quick Quote to a Supplier with a Punchout Catalog

# Ohio OhioBuys Purchasing from a Two-Phase Quote Contract

Updated: 06/21/2024 05:17 PM

Version: 4.0

## 1 Purpose & Profiles

This job aid covers the process for soliciting pre-qualified Suppliers as part of a purchase from a Single Agency Contract Quote, Multi-Agency Contract Quote, or Enterprise Contract Quote contract.

**Profiles:** Requester, Requisitioner, Quick Quote Procurement User

## Used When

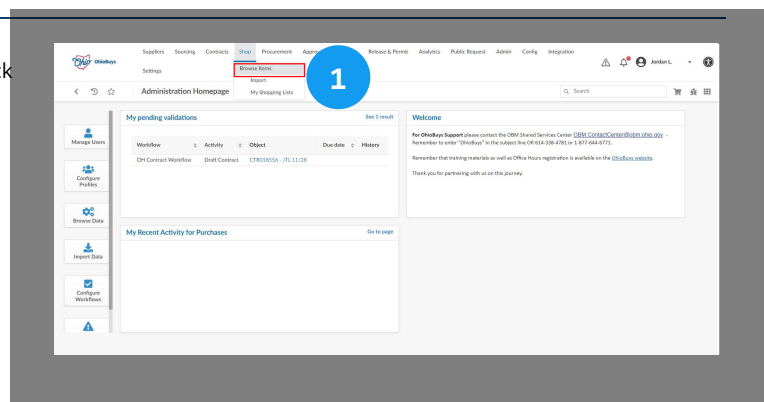
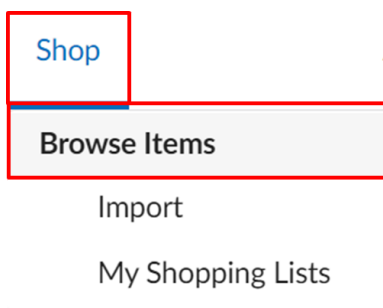
Reference this when an agency would like to purchase from a Single Agency Contract Quote, Multi-Agency Contract Quote, or Enterprise Contract Quote contract in OhioBuys.

### ▲ Note

A Two-Phased Quote Contract is a contract that was awarded to multiple (i.e., pre-qualified) suppliers offering the same goods/services in the same geographic region. These contracts will have a Contract Type of Competitive Selection – Two Phase and a Contract Sub-Type of Single Agency Contract Quote, Multi-Agency Contract Quote, or Enterprise Contract Quote. Each qualified Supplier will have their own contract (e.g., CSP900922-1, CSP900922-2, CSP900922-3, etc.). These contracts will share an Index Number. When an agency has a need and would like to purchase from one of these contracts, they should only solicit the pre-qualified Suppliers on that contract. Only those Suppliers may submit a response to the solicitation and then a subsequent award can be made.

## Shop: Browse Items

1. Log in to OhioBuys. From the Main Menu Navigation Bar, click **Shop** and then select **Browse Items** from the drop-down menu.



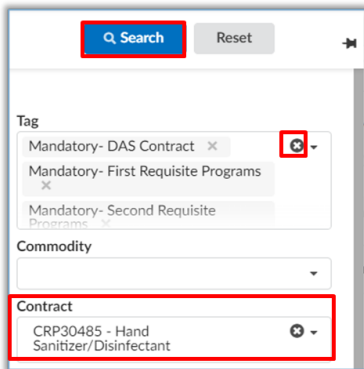
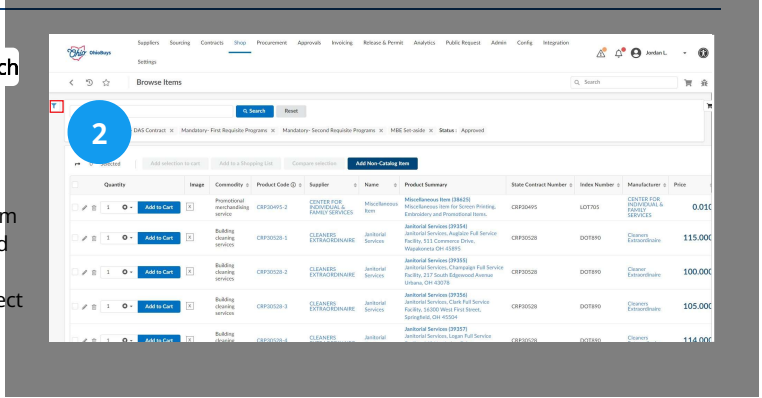


# Creating and Awarding Quick Quotes in OhioBuys Purchasing from a Two-Phase Quote Contract

## Advanced Search

2. The Browse Items page is displayed. Click the **Advanced Search** (🔍) icon.

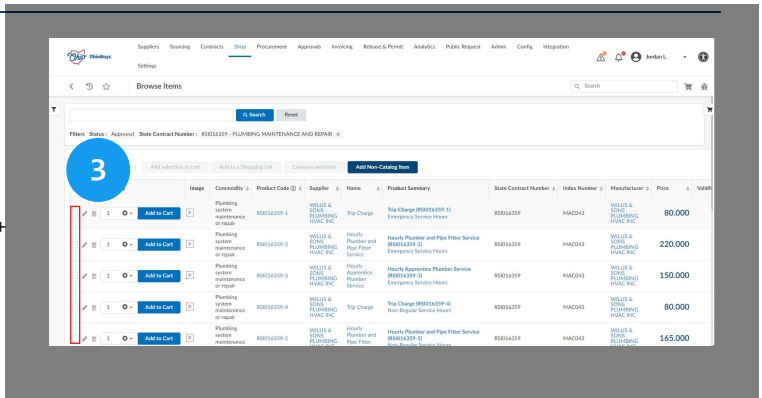
In the **Advanced Search** options, click the X icon to remove the item Tag filters. Then, enter and select the **Contract** for the Two-Phased Single Agency, Multi-Agency Contract Quote, or Enterprise Quote Contract you are trying to purchase from (e.g., RS1016359). To select the correct contract, you may need to click See All in the Contract field to search for and select the correct contract. Then, click **Search**.



## Select the Items

3. On the results page, choose your item(s) by selecting the checkbox(es) next to the item(s).

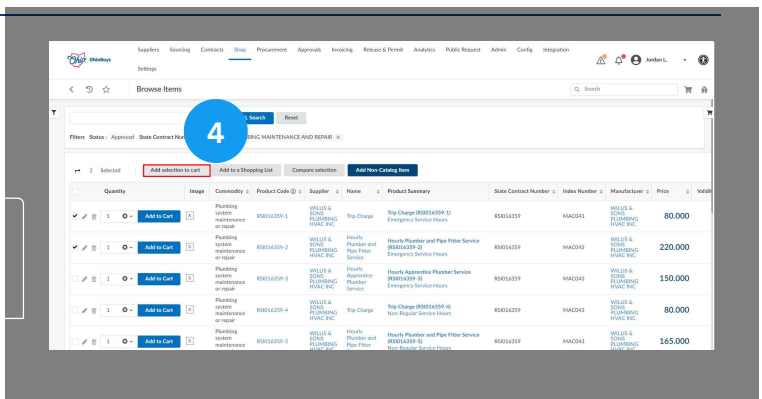
Once you have selected the checkbox(es), you can adjust the quantity by either manually inputting the quantity or clicking the + or - symbol next to the shopping cart.



## Add Selection to Cart

4. Once you have selected your item(s) and adjusted quantities, click **Add selection to cart**.

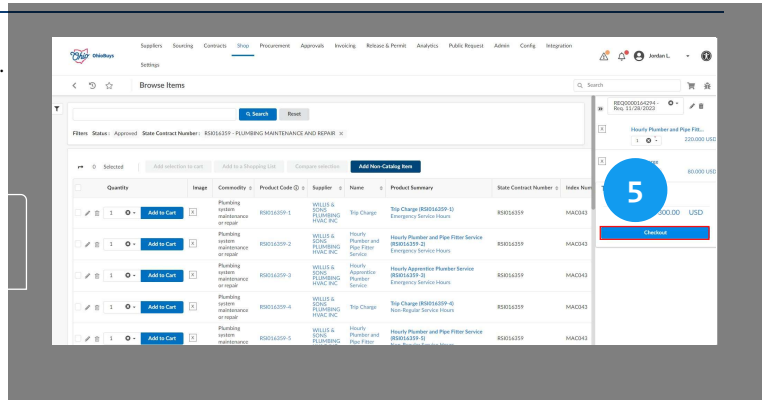
**Add selection to cart**



## Checkout

5. The specified item(s) have been added to your shopping cart. To begin the checkout process, click **Checkout**.

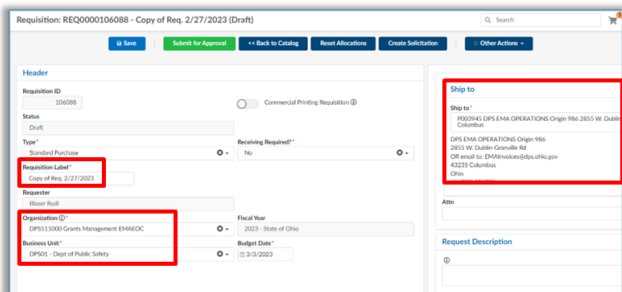
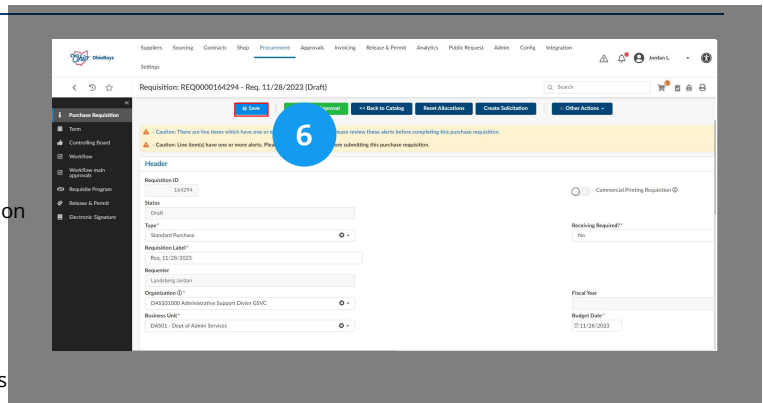
**Checkout**



## Save

6. The checkout page is displayed. After making any necessary updates, click **Save**.

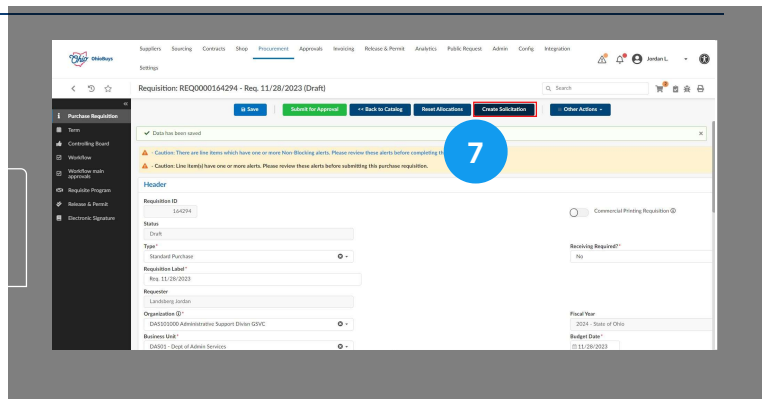
- Update the Requisition Label using your agency's agreed upon naming convention. If your agency does not have a naming convention, use a brief description of the items and your initials (e.g. John Doe buys office supplies so the label is "Office Supplies JD").
- Select your Organization and Business Unit, which is the department or division of your agency that this requisition is for. This field may be pre-populated depending on your access.
- Select the requisition's Ship To and Bill To addresses.



## Create Solicitation

7. Click **Create Solicitation**.

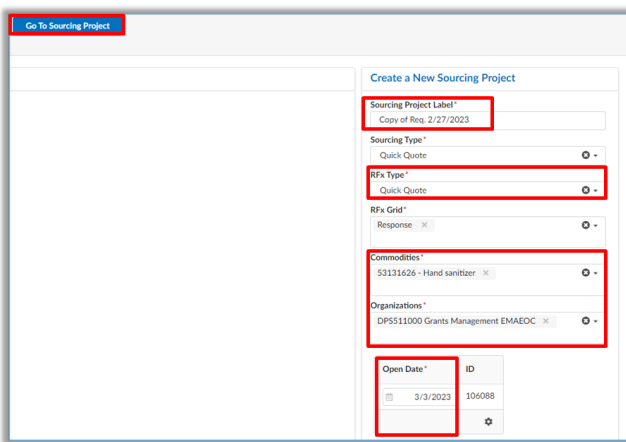
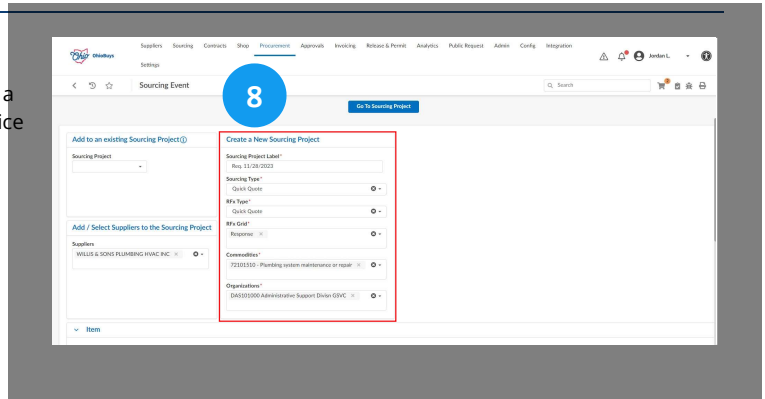
**Create Solicitation**



## Edit Sourcing Project

8. The associated line item information from the purchase requisition will be automatically carried over into the item grid of a new quick quote solicitation (Supplier, Item Description, UOM, Price Quantity). You can edit these details prior to releasing the quick quote solicitation for this page.

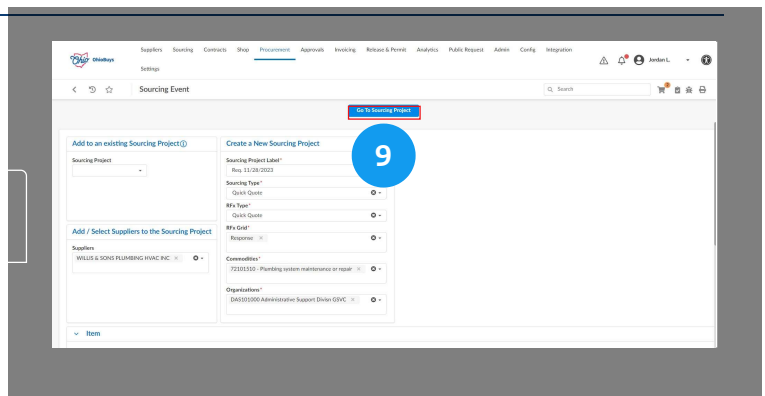
- Enter the **Sourcing Project Label**, which should be a short description of what the quick quote solicitation is for. Note that this will also be the title that Bidders/Suppliers see.
- Set the **RFX Type** to **Quick Quote**.
- Confirm and make any necessary updates to the **Commodities** and/or **Organizations** fields. These fields are pre-populated based on your purchase requisition.
- Enter today's date as the **Open Date**.



## Go To Sourcing Project

9. Click **Go To Sourcing Project**.

**Go To Sourcing Project**



Save

10. The quick quote solicitation has been created. From the Setup Project tab, confirm the displayed information and make updates as needed. Then, click **Save**.

Sourcing General Information

Solicitation ID  
SRC0000014673  Save as a template

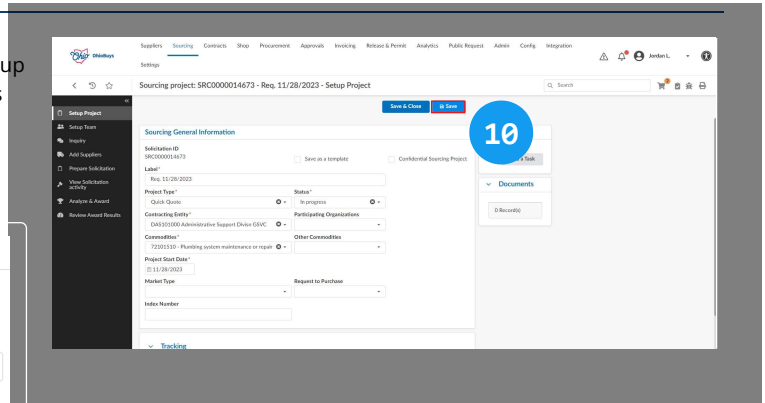
Label\*  
Req. 11/28/2023

Project Type\* **Quick Quote** Status\* **In progress**

Contracting Entity\* **DAS101000 Administrative Support Divisn GSVC** Participating Organizations

Commodities\* **72101510 - Plumbing system maintenance or repair** Other Commodities

Project Start Date\*  
11/28/2023

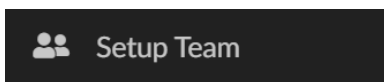


Save

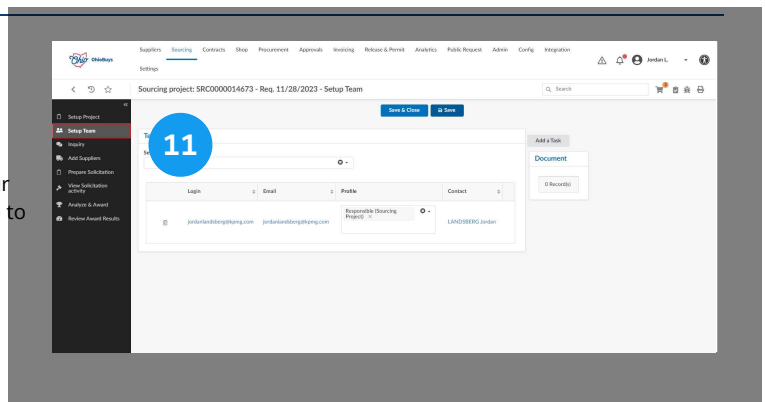
11. Navigate to the **Setup Team** tab.

On the **Setup Team** tab, you re 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 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.


- Search for your team members using the Select User field. Assign them a profile of **Contributor (Sourcing Project)**.
- Note that only the user listed as **Responsible** for the project is able to release and reward the quick quote.

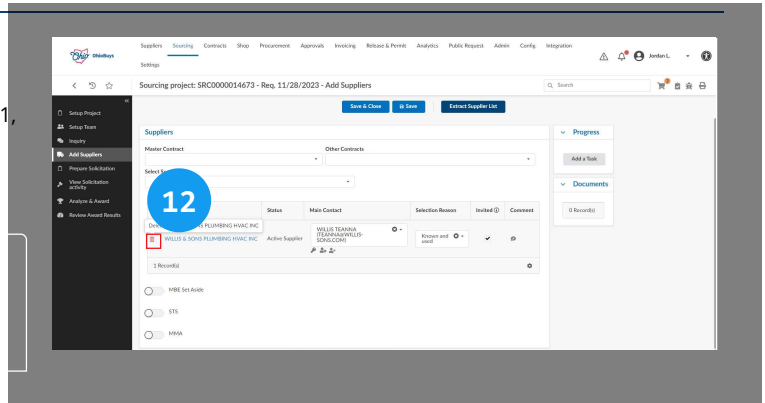
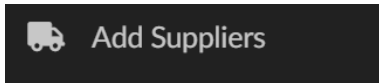


Select user(s)



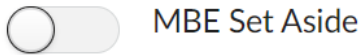
## Trash Can

12. Navigate to the **Add Suppliers** tab and click the **Trash Can** (  ) icon to remove the placeholder Supplier (e.g., DNR01, DAS01, etc.).




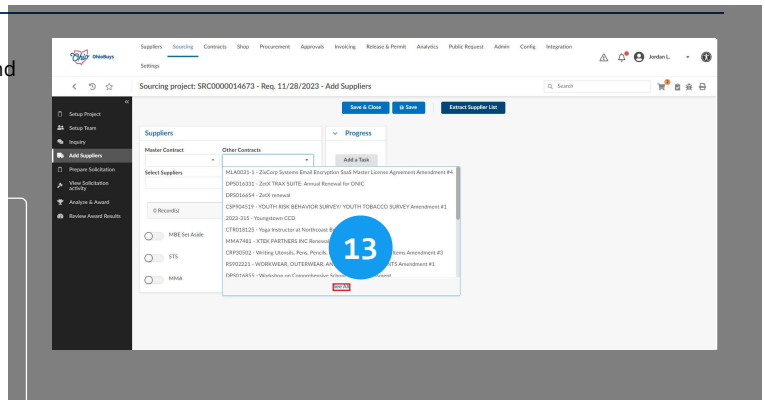
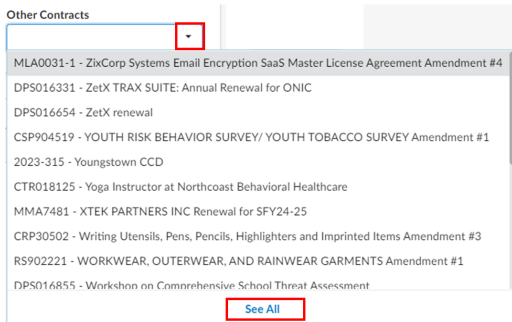
### ▲ Note

To only invite bidders and/or suppliers with valid MBE status, slide the **MBE Set Aside** indicator on this tab. The system will then add the selected contract(s) with MBE suppliers.



## See All

13. Click the **Selector** (  ) icon on the **Other Contracts** field and then click **See All**.

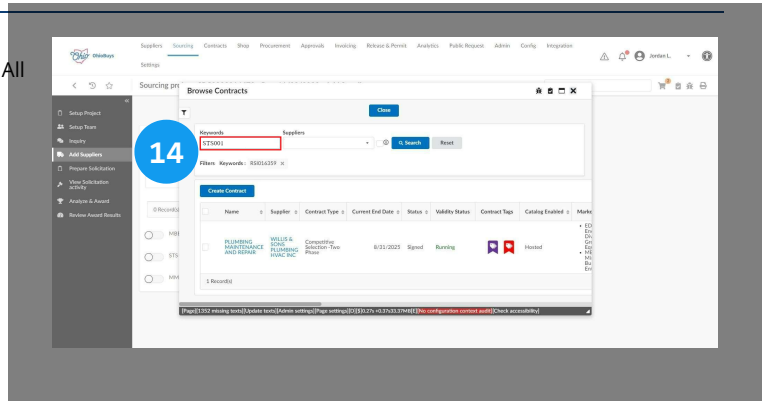


## Enter Index or Contract Number in Keyword field

14. Enter the Index Number in the **Keyword** field (e.g., STS515). All applicable Suppliers' contracts are returned.

Keywords

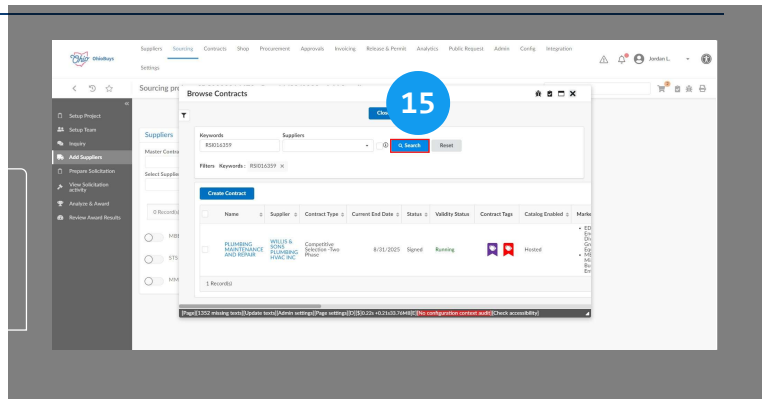
STS515



## Search

15. Click **Search**.

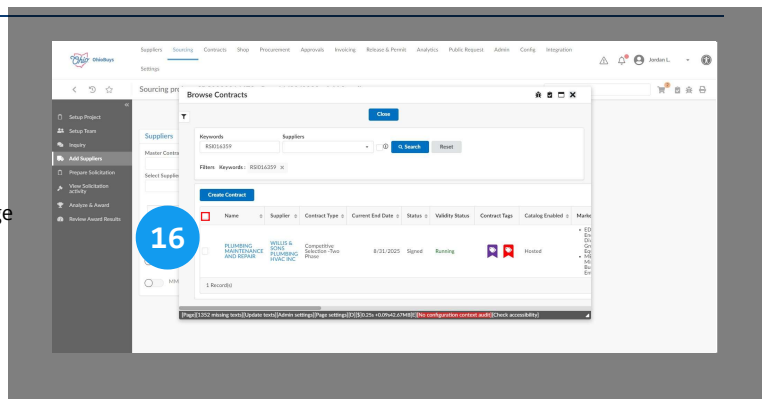
Search



## Checkbox Icon

16. Click the **Checkbox** (  ) icon next to the **Name** header to select all of the displayed Suppliers.

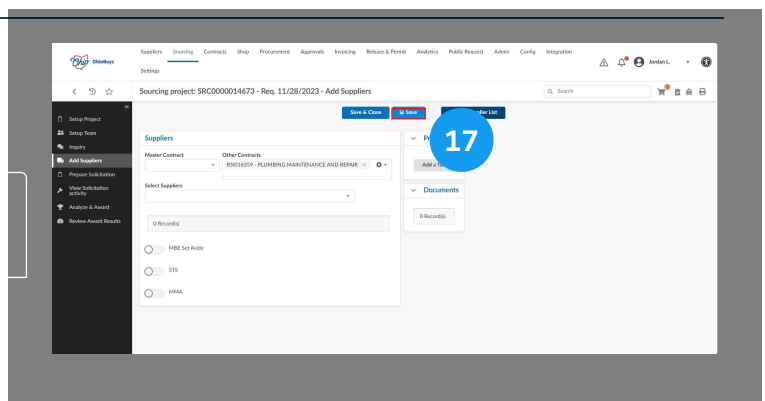
If there are multiple pages of search results, navigate to each page and click the **Checkbox** (  ) icon next to the Name header on each page to ensure all Suppliers are selected.



## Save

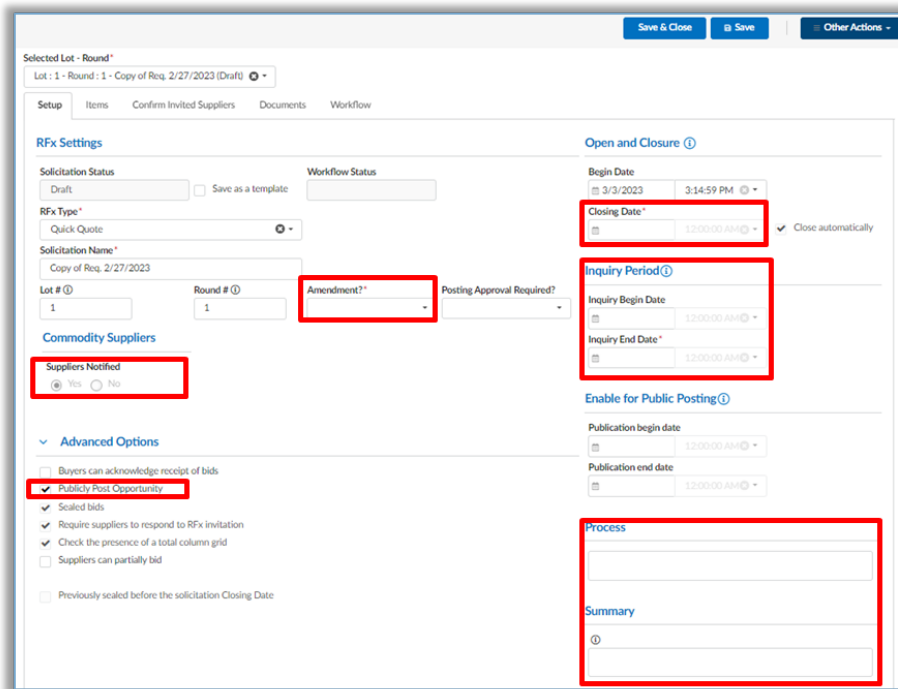
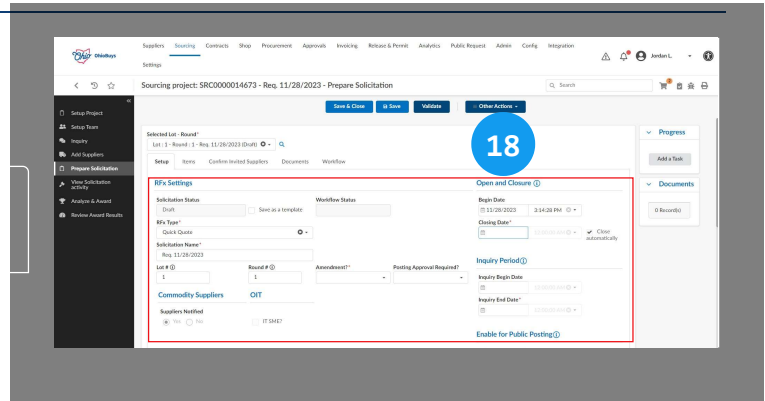
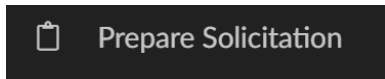
17. Click **Save**.

Save



## Prepare Solicitation

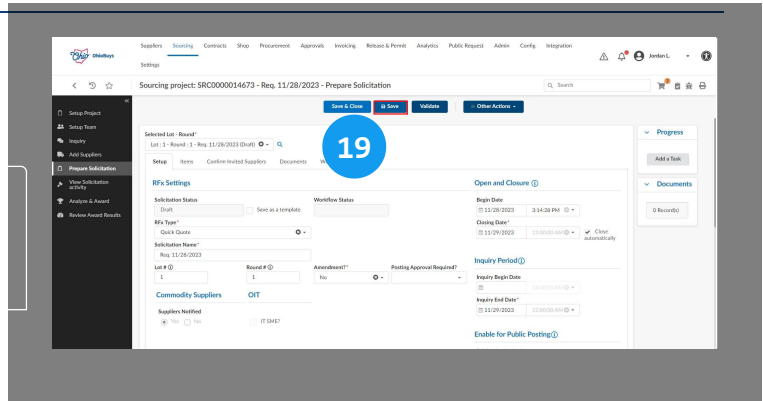
18. Navigate to the **Prepare Solicitation** tab.



- Enter a **Closing Date** and time, which is the date and time responses are due from Bidders and/or Suppliers.
- Set the **Amendment** field to **No**.
- 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.
  - If the Inquiry Begin Date is not populated by the user, it will automatically match the solicitation posting date once the solicitation is open for bidding. However, users must always manually input the Inquiry End Date.
- 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. If your solicitation requires a site visit before a bid can be submitted, detail the site visit process in this field.
  - 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. It needs to include a clear description of the need, when the goods/services will be needed, the Ship To address, and the method of payment as appropriate.
- Under **Advanced Options**, uncheck the **Publicly Post Opportunity** checkbox and set the **Commodity Suppliers Notified** selector to **No**.

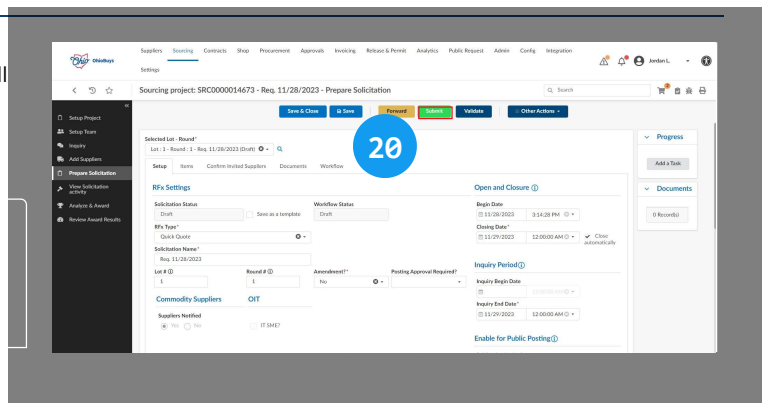
## Save

19. Fill out the mandatory fields and then click **Save**.



## Submit

20. After saving your solicitation, click **Submit**. Note that this will **NOT** send your quick quote to Suppliers.



Proceed to release the quick quote solicitation by following the steps in Release a Quick Quote Solicitation. After the Bid Closing Date for the quick quote solicitation has passed, please refer to Analyze and Award a Quick Quote Solicitation for details on how to analyze and award the quick quote solicitation. Once an award has been made, follow the steps on updating the original purchase requisition with the award details and be sure to select the awarded Supplier's contract on the Contract field of the line item details page for each awarded line item.

After completing the steps outlined in this document, please reference the following materials for additional instructions:

[Release a Quick Quote Solicitation](#)

[Analyze and Award a Quick Quote Solicitation](#)

If you have questions or need additional assistance, please contact the OBM Contact Center via email ([OBM.ContactCenter@obm.ohio.gov](mailto:OBM.ContactCenter@obm.ohio.gov)) or phone (877-644-6771).





# Creating a Purchase Requisition when Awarding a Completed Quick Quote to a Supplier with a Punchout Catalog

Updated: 06/21/2024 05:33 PM

Version: 4.0

## 📌 Purpose & Profiles

This job aid covers the process of creating and updating a purchase requisition with the results of a completed quick quote when the Supplier receiving the award provides these items in a different punchout catalog.

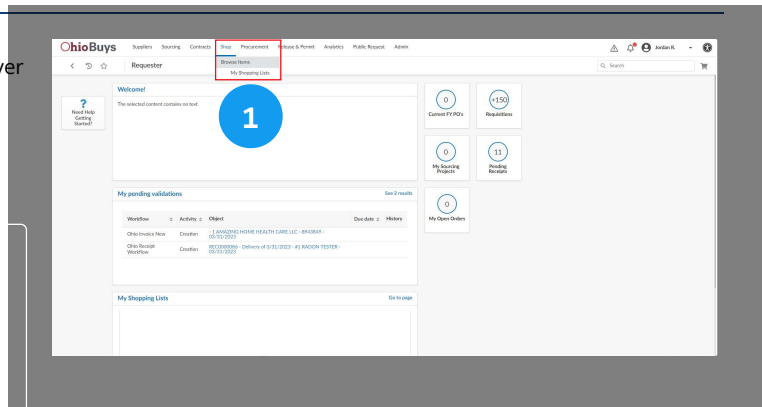
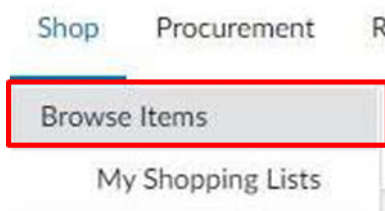
**Profiles:** Requisitioners, Quick Quote Procurement Users

## 📖 Used When

Reference this when you have completed a quick quote using items from a Supplier's hosted or punchout catalog in the original purchase requisition and need to award a Supplier who provides those same items in a different punchout catalog. (e.g., certain STS033 contracts.)

## Shop: Browse Items

1. Log in to OhioBuys. From the Main Menu Navigation bar, hover over **Shop** and then select **Browse Items** from the drop-down menu.



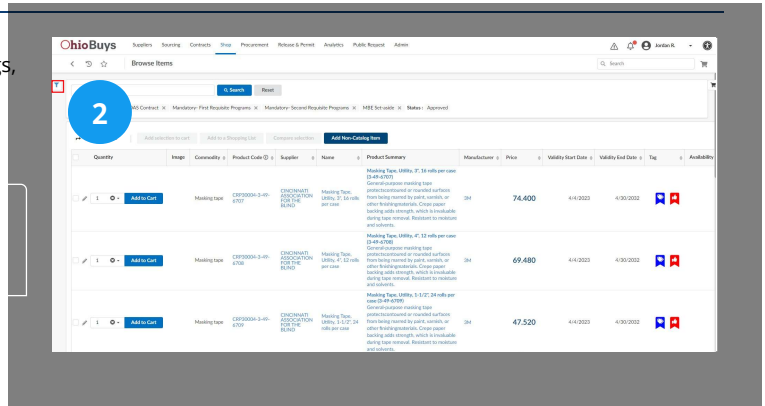
# Creating and Awarding Quick Quotes in OhioBuys

## Creating a Purchase Requisition when Awarding a Completed Quick Quote to a Supplier with a Punchout Catalog

### More Filters

2. To limit the displayed items to only include punchout catalogs, click the **More Filters** icon.

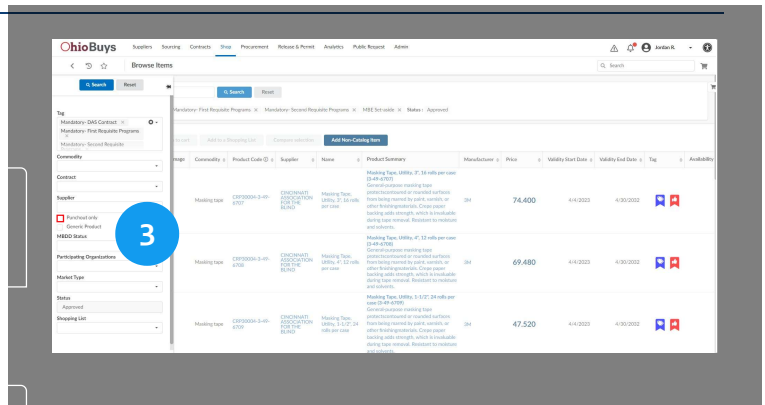
More Filters icon



### Punchout Only Checkbox

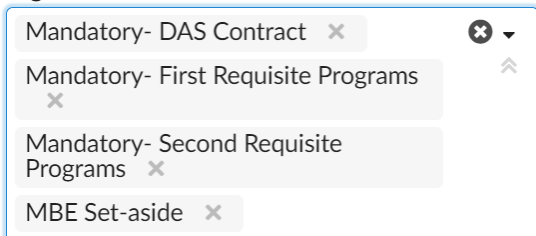
3. Select the **Checkbox** icon to filter for **Punchout only**.

Checkbox icon



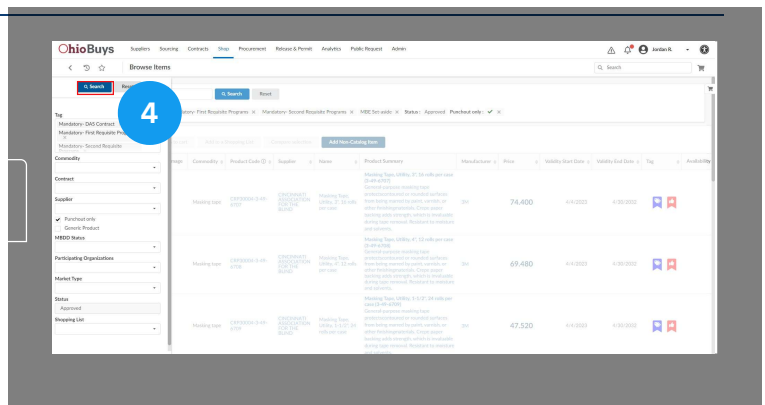
To filter and search for a punchout catalog from a specific supplier or contract, clear the item filters in the Tag drop-down list and enter the supplier or contract name in the field you would like to search.

Tag



### Search

4. Click **Search**.



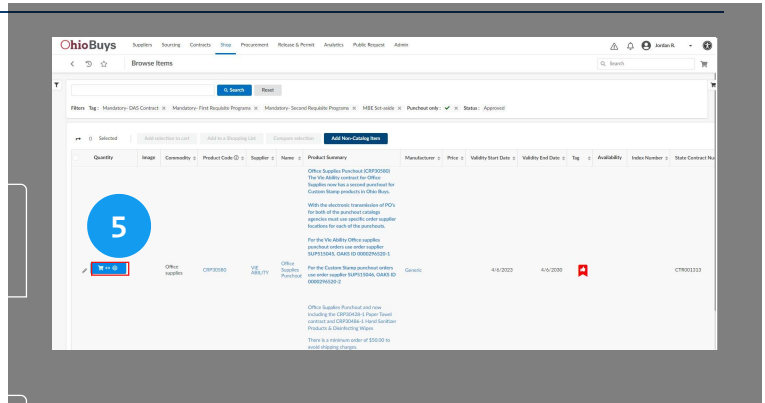
# Creating and Awarding Quick Quotes in OhioBuys

## Creating a Purchase Requisition when Awarding a Completed Quick Quote to a Supplier with a Punchout Catalog

### Shop Online

5. Once you have located the Supplier whose punchout catalog you would like to access, click the **Shop Online** icon.

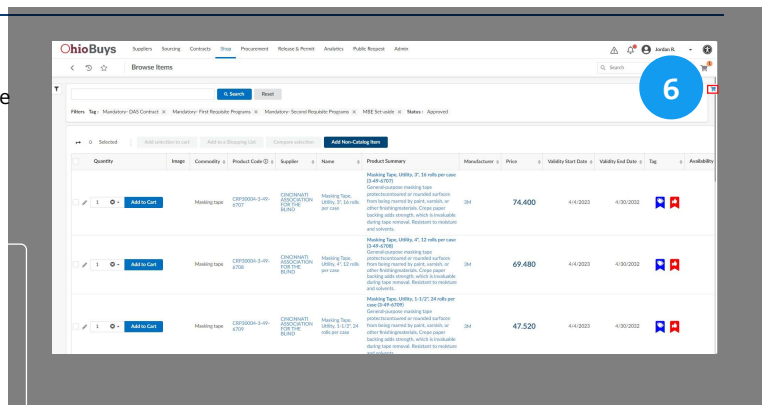
#### Shop Online icon



Users can order items from the punchout catalog and will be returned to OhioBuys with the items from the Supplier's punchout catalog already added to your shopping cart. Supplier punchout catalogs are unique and what users see in each catalog will depend on which is selected.

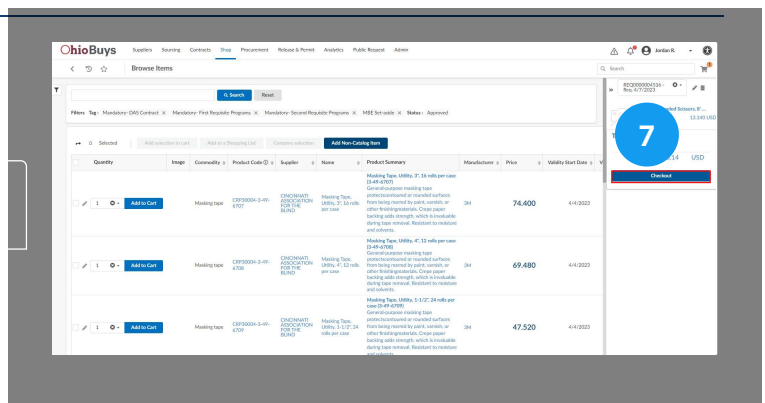
### Checkout

6. After completing the cart on the Supplier's punchout catalog website, users will be brought back into OhioBuys to complete the checkout process. Click the **Shopping Cart** icon located over the scroll bar.



### Checkout

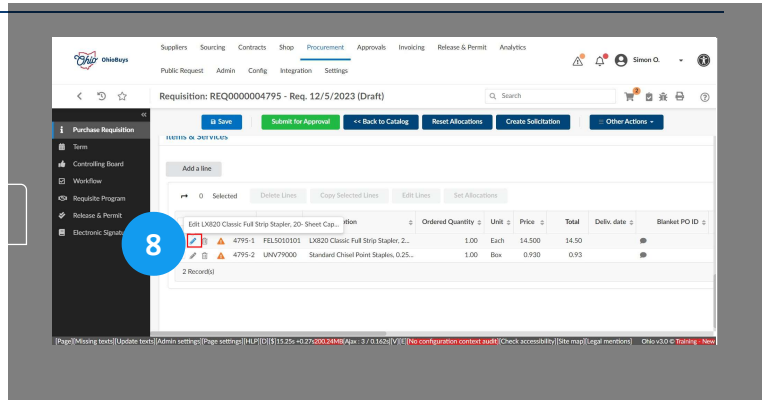
7. Click **Checkout**.



## Open the Line Item

8. Navigate to the line item(s) you intend to award and click the Pencil icon.

Pencil Icon: 

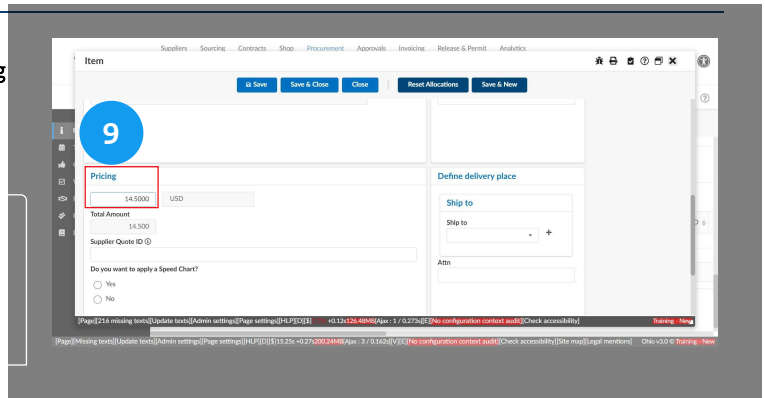


## Update the Item Price

9. Enter the price quoted by the awarded Supplier in the Pricing section.

**Pricing**

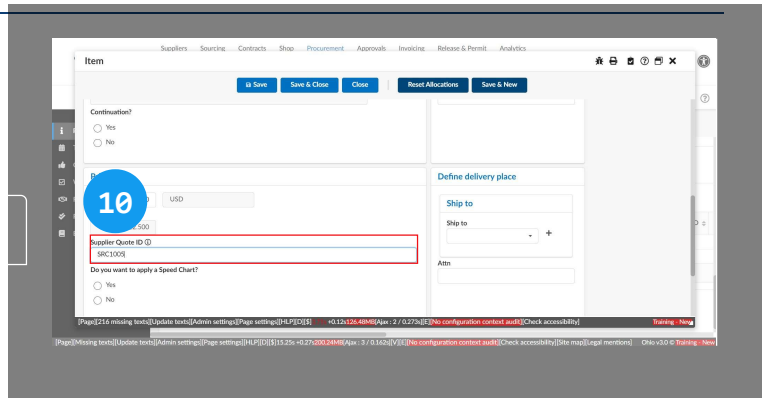
14.5000



## Enter the Quote ID

10. Select the Supplier Quote ID field and enter the sourcing project number.

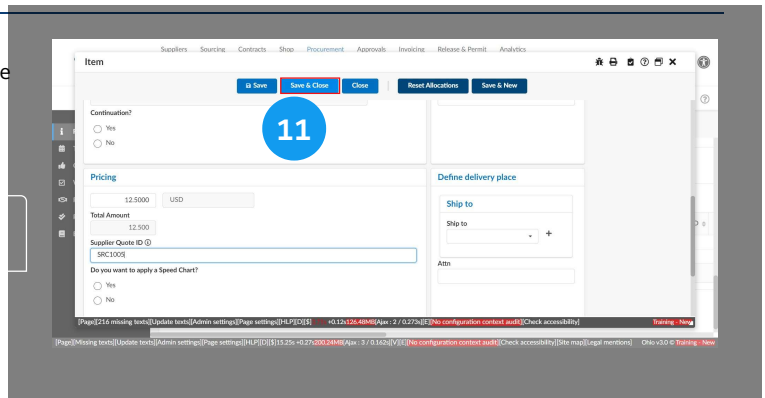
Supplier Quote ID



## Update the Remaining Line Items

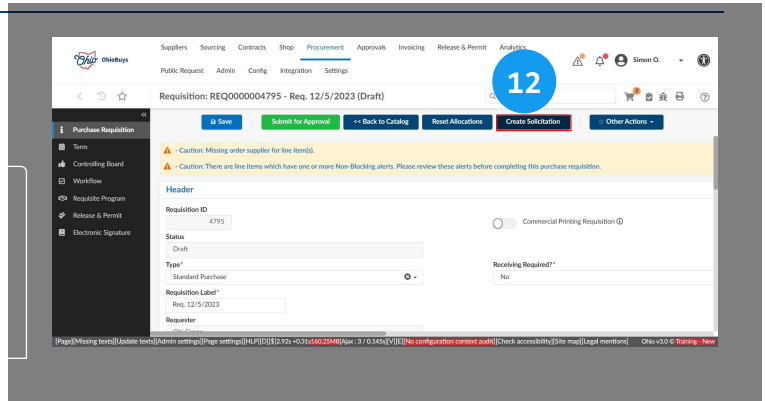
11. Click Save & Close and continue to update the pricing for the remainder of the line items.

**Save & Close**



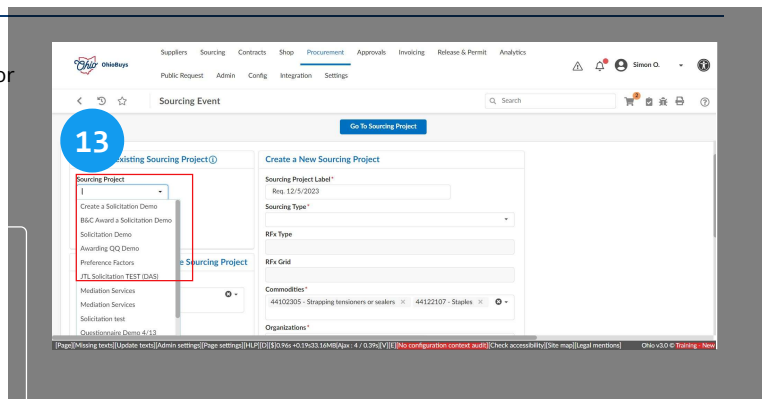
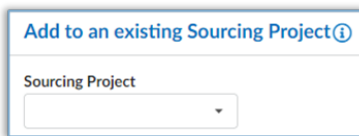
## Create a Quick Quote

12. Click **Create Solicitation**.



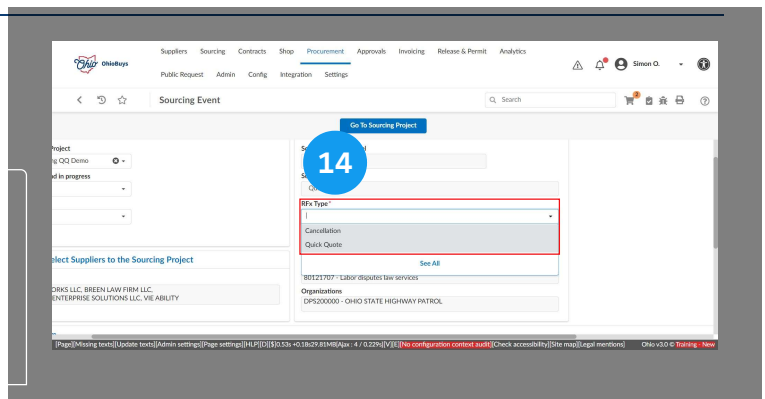
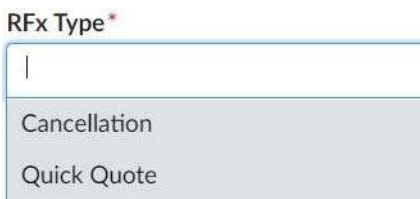
## Link to the Existing Quick Quote

13. In the **Add to an existing Sourcing Project**, select the name or SRC number of the solicitation you would like to reference on the purchase requisition from the drop-down menu.



## Select the RFX Type

14. Enter the **RFX Type** field and select **Quick Quote**.

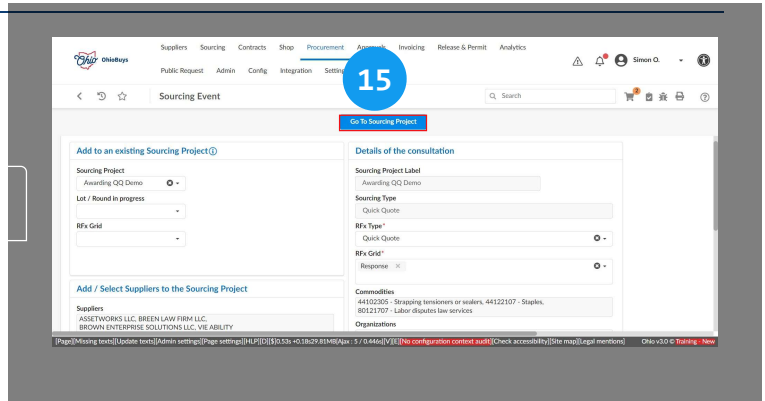


# Creating and Awarding Quick Quotes in OhioBuys

## Creating a Purchase Requisition when Awarding a Completed Quick Quote to a Supplier with a Punchout Catalog

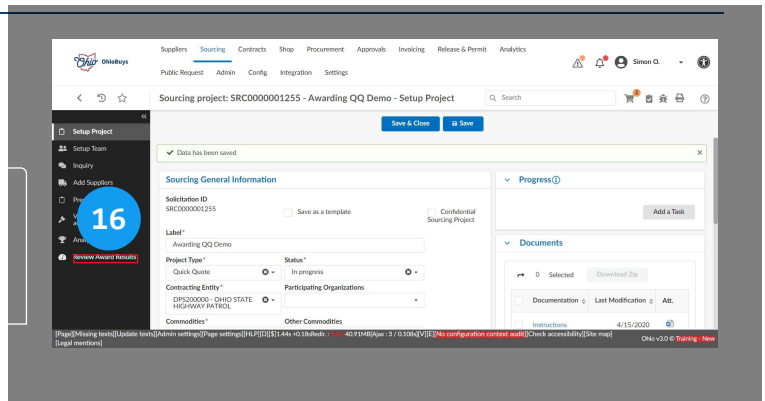
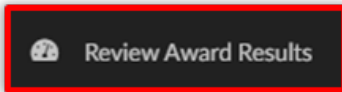
### Create a Quick Quote

15. Click **Go To Sourcing Project**.



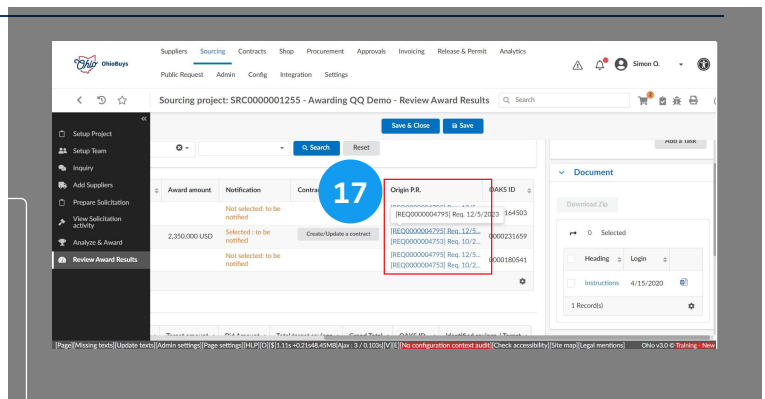
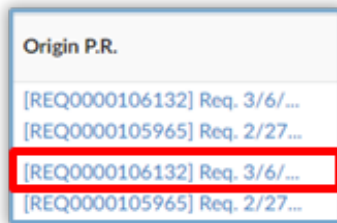
### Award a Quick Quote

16. Navigate to the **Review Award Results** tab.



### Link a PR to a QQ

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



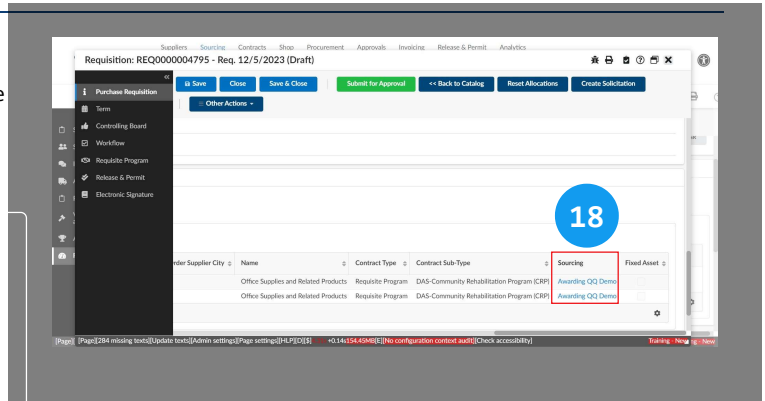
## Complete the Purchase Requisition

18. The line items for the purchase requisition will be linked to the quick quote from which the pricing was determined. Populate any remaining information on the purchase requisition.

Sourcing

Awarding QQ Demo

Awarding QQ Demo



### ▲ Note

Once the new purchase requisition has been successfully lined to the sourcing project, the original purchase requisition that was created can be canceled.

If you have questions or need additional assistance, please contact the OBM Contact Center via email ([OBM.ContactCenter@obm.ohio.gov](mailto:OBM.ContactCenter@obm.ohio.gov)) or phone (877-644-6771).