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Video Guide

Please click the link below to view the YouTube video offering guidance to purchasers:

Purchaser's Quick Quote Training Video

What is Quick Quote?

Quick Quote is an online quotation facility which allows Contracting Authorities to obtain competitive quotes electronically for low value requirements. Details of the Quick Quote are created online through the notice creation wizard and distributed to a select list of suppliers. There are a number of ways in which to filter and select the suppliers that you want to invite to quote. Quick Quotes are only distributed to the selected suppliers and are not made public on the portal.

The selected suppliers can then complete the required details and submit their quotation using the secure tender Postbox (for more information on this please see the Tender Postbox Guide).

Before using the Quick Quote facility users should:

- 1. Satisfy themselves that using Quick Quote meets their obligations for adequate publicity, and
- 2. Ensure that the procurement/mini-competition is for low value/risk goods, services or works, and
- 3. Ensure that there is no existing contract which could be accessed; and
- 4. Ensure this quotation is aligned to your local financial instructions.

For further information on the use of Quick Quote please click here to access the SPPN:

http://www.publiccontractsscotland.gov.uk/guides/Guides show.aspx?id=341

Quick Quote Access Levels

In order that Buyer users can create and distribute Quick Quotes they must be allocated the relevant access levels:

Quick Quote Editor

Allows a user to create and edit a Quick Quote before it is distributed and be selected to open the Quick Quote Postbox.

Quick Quote Publisher



Allows a user to distribute a Quick Quote to selected suppliers, add additional information to a distributed Quick Quote and be selected to open the Quick Quote Postbox.

Ideally any user responsible for dealing with Quick Quotes should be allocated both access levels. This can be done by a user with *Controller* access by selecting **Buyer > Organisations** > **User list**. Select the name of the user you wish to amend and select **save** once access levels are set.

Your Quick Quote Control Panel

Your Quick Quote Control Panel is accessible by selecting 'Quick Quotes' in the 'Notices' menu of your Buyer Control Panel.

Here you can find all Quick Quotes and Quick Quote Awards. These can be viewed as a list published by your buyer organisation or those created by yourself.

Quick Quote Control Panel

Quick Quote Control Panel

Quick Quote (QQ) is an online quotation facility which allows buyers to obtain competitive quotes electronically for low value requirements. Details of the QQ are created online and sent to a selected list of suppliers, who can then complete the required details and submit their quotation using the secure postbox. QQs are only distributed to the selected suppliers and are not made public on the website.

Before using the quick quote facility users should:

Ensure that the procurement/mini-competition is for low value/risk goods, services or works;

Ensure that there is no existing contract which could be accessed; and

Ensure this quotation is aligned to your local financial instructions.

For further information on the use of Quick Quote please read the Scottish Procurement Policy Note (SPPN)

Quick Quotes

Create a **New** Quick Quote Quick Quote **User Guide**

My Quick Quotes

My Unpublished Quick Quotes

My Published Quick Quotes

Buyer Quick Quotes

Buyer Unpublished Quick Quotes

Buyer Published Quick Quotes

Quick Quote Awards

View list of Quick Quotes **Requiring Awards** Quick Quote Awards Report

My Quick Quote Awards

My Unpublished Quick Quote Awards

My Published Quick Quote Awards

Buyer Quick Quote Awards

Buyer Unpublished Quick Quote Awards

Buyer Published Quick Quote Awards



How do I create a Quick Quote?

From your Quick Quote workspace page select the link 'Create a New Quick Quote'.

Title and type of contract

You will be asked to provide a title for your Quick Quote and select the type of contract. Once you do this select 'Confirm'.

Create Quick Quote

Create Quick Quote						
Quick Quote Control Panel > Quick Quote Creation Wizard						
Welcome to the Quick Quote Creation Wizard which will guide you through the process of creating a Quick Quote. Please enter a title for this quote and select the type of contract in the <i>Quote Details</i> section below. You will then be asked a series of questions which will enable the full quote to be generated and distributed. Required answers are marked with an asterisk (*)						
Quote Details						
* Title:	Test					
* Contract Type:	O Services Contract					
	Supply Contract					
	O Works Contract					
* Regulated Notice:	○ Yes No					
Confirm						

Question List

Once you have selected 'Confirm' you will be taken to the question list where you can work through each question by using the Next button or by using the drop down menu 'Jump To'.

Your answer to each question is stored when the 'Next' or 'Save & Exit' buttons are selected and you can stop at any point during the process and return later to complete all the questions.

The Quick Quote is made up of the following Questions:

Purchasing Authority Details

Details of your buyer details, including a contact name, department and telephone number should be inserted here.

Description of the contract requirements

A free text box for you to describe the requirements of the quote.

Scope of the contract



An optional field where you can state the quantity required.

Quick Quote Timescales

The deadline for completed quotes to be submitted to the electronic postbox. You must choose a date and a time by which the Postbox will close.

Additional Information

A free text box for any supplementary information.

Commodity Categories

Select the commodity category(s) which relate to the requirement. The commodity categories selected here will generate the "matching suppliers" list at the Quick Quote distribution page. You can switch these categories off and search in other ways at the distribution stage should a supplier you are looking for not have picked the same categories.

Additional Options

You can use the Questions and Answers and Additional Documents function.

Additional Documents

A total of 100MB of files can be uploaded per Quick Quote.

Question and Answer Administrator

Select the user to whom the system should direct questions, supplier queries, alerts and other information regarding this notice.

Tender Postbox Opener

Select the user(s) whom you want to open the tender Postbox to download the quotes. As the Quick Quotes are for low value requirements then the "Opener" access level is not required, anyone with "Quick Quote Editor" access can be selected to open the Postbox for a Quick Quote. (For more information on this function please see the Tender Postbox Guide)

Once you have answered all the relevant questions Quick Quote creation is complete and you have the option to preview it, distribute it or return to your notice workspace.

How do I Distribute a Quick Quote?

When you are ready to distribute the Quick Quote you must select the 'Select Suppliers' button to start the distribution process:

Quick Quote Creation Completed





Alternatively, if you are returning to a Quick Quote from your unpublished Quick Quote list, you can click on the title of the Quick Quote and then the "Distribute" button.

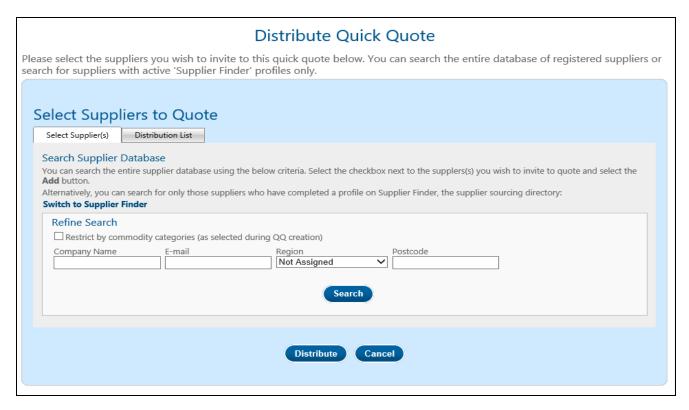
You will then be directed to the Quick Quote Distribution Page where you will select the suppliers that you want to invite to quote.

How do I search for Suppliers for a Quick Quote?

From the Quick Quote Distribution page you can search for suppliers you want to invite to quote by using the "Select Suppliers" tab.

Distribute Quick Quote





The default setting is to search the entire database of registered suppliers. There is also an option to switch to "Supplier Finder" which will allow you to search for only those suppliers who have completed a profile on Supplier Finder, the supplier sourcing directory.

The search options available are:

Search Supplier Database

- Restrict by commodity categories: Find only those suppliers who match the commodity categories you included during Quick Quote creation.
- Company name: The name of the company as entered by the supplier during registration.
- E-mail: The particular supplier's registered e-mail address. Note: you can use this to search by domain name to find all suppliers registered for a particular company.
- Region: The local authority region where the supplier is based.
- Postcode: The postcode of the company as entered by the supplier during registration. Note: you can use a partial postcode to deliver suppliers in a particular area, i.e. "AB".

Supplier Finder

- Restrict by commodity categories: Find only those suppliers who match the commodity categories you included during Quick Quote creation.
- Only show SMEs. Find only those suppliers who have stated they are an SME within their Supplier Finder profile.



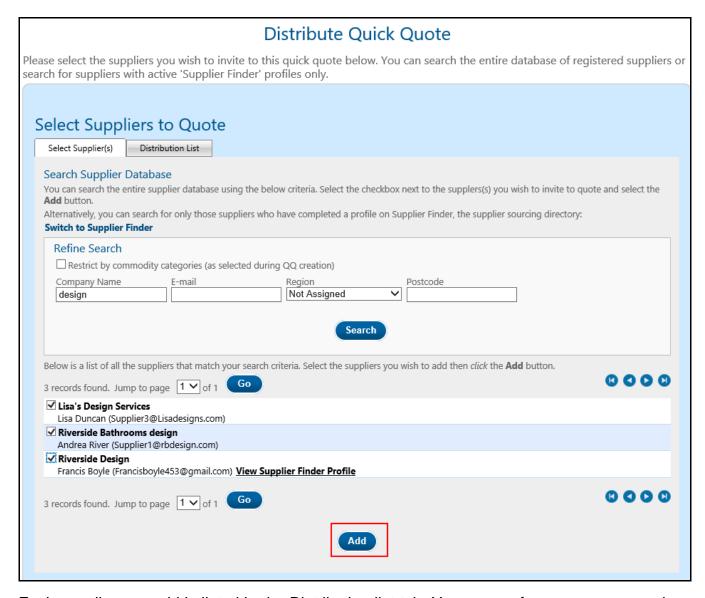
- Company name: The name of the company as entered by the supplier during registration.
- E-mail: The particular supplier's registered e-mail address. Note: you can use this to search by domain name to find all suppliers registered for a particular company.
- Region: The local authority region where the supplier is based.
- Keywords: Search for suppliers who have included certain terms within the searchable element of their Supplier Finder profile, e.g. "Cyber Security".
- Postcode: The postcode of the company as entered by the supplier during registration. Note: you can use a partial postcode to deliver suppliers in a particular area, i.e. "AB".

How do I Add Suppliers to a Quick Quote?

Your search for suppliers will present you with a list of matching suppliers. You can add the suppliers that you want to invite by selecting the box to the left hand side of the supplier name and then select 'Add'. You can select and add multiple suppliers at one time.

Distribute Quick Quote





Each supplier you add is listed in the Distribution list tab. You can perform as many searches as required, adding suppliers to the distribution list and then performing a new search. Any user added to this list is subsequently excluded from the list of suppliers presented when you search. If you wish to remove someone from the distribution list you can select 'Remove' next to their name.

Once you are happy with your distribution list select 'Distribute'. Selecting 'Distribute' will send an e-mail to all suppliers on the list informing them of the request for quotation and asking them to log into the site to accept or decline the invitation. You will also receive an e-mail confirming that your Quick Quote has been distributed.

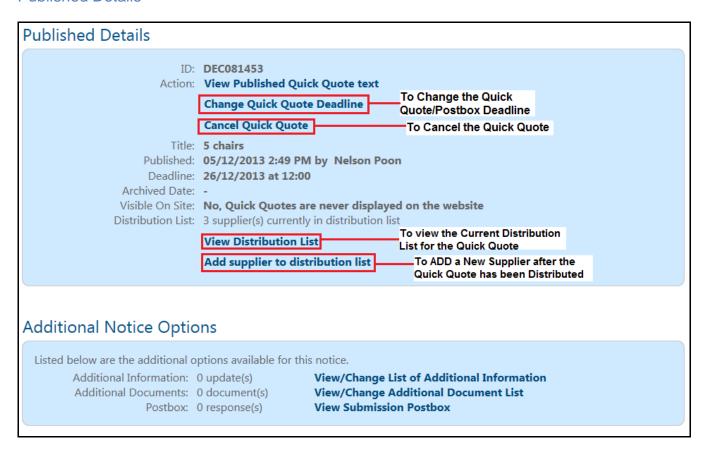
How Do I Administer a Quick Quote?



Once a Quick Quote has been dispatched you can access it from your published Quick Quote lists in your Quick Quote Control Panel. If required any user with *Quick Quote Publisher* access can:

- Add a new Supplier to the distribution list By clicking the "Add new supplier to distribution list" link, searching for the supplier and clicking "Distribute" again. The new supplier will receive an e-mail inviting them to quote and will be added to the distribution list.
- Cancel the Quick Quote by clicking 'Cancel' next to "Deadline". This will inform all those on the distribution list that it has been cancelled.
- **Change the deadline for responses** by clicking 'Change' next to "Deadline". This will inform all those on the distribution list that the deadline has been changed and will reset the deadline of the electronic postbox.
- Add additional information or documents. The additional information/documents will be e-mailed to the distribution list.
- **Answer/discard Questions** asked through the Q&A system.

Published Details



How do I Deal with Quick Quote Responses?



You can monitor supplier responses from your Quick Quote by clicking on the title of the Quick Quote and then on the Quick Quote status page click on "Distribution List".

Quick Quote Supplier Responses

Quick Quote Supplier Responses

Below is a list of the suppliers invited to quote. The list shows each supplier and the status of the supplier confirmation.

On receiving the Quick Quote each supplier was asked to accept or decline the request to quote, their responses are listed under Confirmation Status.

Download as Excel | Download as CSV

Id	Supplier	Company Name	Confirmation Status	Invited On	Invited By
12388	David Thomson	Millstream Associates	No Response	05/12/2013 14:58	Administrator Administrator
12410	David Smith	Smith Cuttings	Declined - View Reason	05/12/2013 14:58	Administrator Administrator
12411	Alison Wood	Wood Cut Industry	Confirmed	05/12/2013 14:58	Administrator Administrator
12389	Kim Postlethwaite	Postlethwaite Ltd	No Response	05/12/2013 14:58	Administrator Administrator
12387	Line Olsen	Millstream Supplier	No Response	05/12/2013 14:49	Administrator Administrator
12409	Duncan Dallas	Millstream	No Response	05/12/2013 14:49	Administrator Administrator
12386	Line Olsen	Line's Baked Goods	No Response	05/12/2013 14:49	Administrator Administrator

The example above shows that one supplier has confirmed that they intend to quote, one has declined the invitation and another has not yet responded to the Quick Quote invitation from their Supplier's Quick Quote work space.

An additional Supplier has also added to the Distribution List after the Quick Quote was distributed – If you check the time stamp on the Publish Quick Quote status page you'll see that this Quick Quote was originally distributed on the 05/12/2013.

The **Confirmation Status** function is designed to help you monitor that all suppliers have received the invite and how many intend to quote. Should a supplier decline or not respond this will not affect their ability to submit a quote. The Quick Quote will still be listed in their Supplier's Quick Quote List.

There will also be information as to when a supplier was invited and by whom the supplier was invited. This will confirm if a Supplier was added to the Quick Quote after it was originally distributed and by what user.

As with a regular contract notice you can add further information to the quote, change the deadline for responses or cancel the Quick Quote through the published Quick Quote workspace.

If selected, Questions and Answers are dealt with in the same way as with a contract notice.

The tender postbox works in the same way as with a contract notice. Once you have analysed the quotes and made a decision on the winning supplier you should notify the suppliers by issuing a Quick Quote Award.

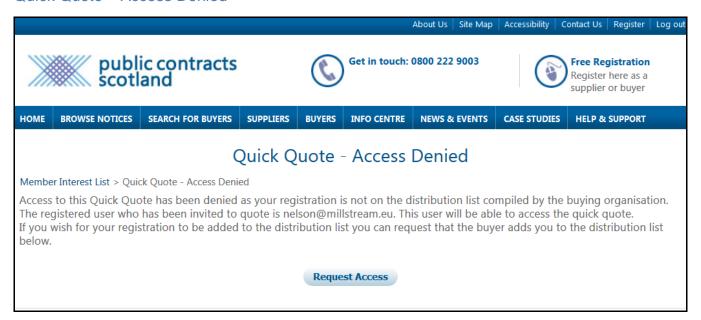


Should any suppliers get in touch with the buyer regarding the Quick Quote functions there is a user guide for suppliers under the menu: Help>User Guides.

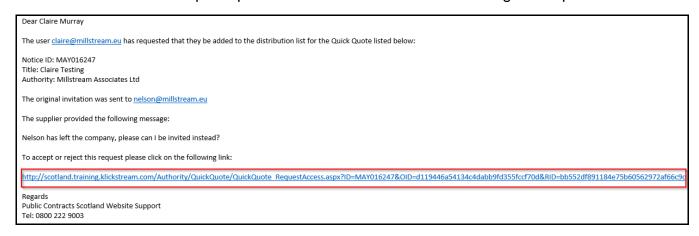
How do I deal with a supplier request to be added to the distribution list?

It is possible for a supplier to request that the buyer add them to the distribution list via the system, this is to combat the issue of suppliers not being able to access a quotation exercise because their colleague has been invited instead of them. If the supplier tries to access a quote that they have not been invited to, they will receive an "access denied" message with the option to requesting access:

Quick Quote - Access Denied



If the supplier does choose to request access they will provide a short message and the buyer user who distributed the quick quote will receive and e-mail containing the request:



There is a link contained in the e-mail allowing you to accept or decline the request, together with a message from the supplier detailing the reason for the request. If you accept the



request, the supplier with receive the quick quote invitation e-mail. If you decline the request, the supplier will receive an e-mail advising of this.

How do I Create a Quick Quote Award?

From your Quick Quote Control Panel select the link "My Published Quick Quotes" or "Buyer Published Quick Quotes" if you did not create the Quick Quote.

Click on the published Quick Quote title you wish to create a Quick Quote Award for and click the "Award" button to create your Quick Quote Award.

Quick Quote Status

Quick quote status

Pre-Publication Details

Document ID: 192420 View Pre-Publication Quick Quote text

Title: 5 chairs

Nature Of Contract: Supply Contract

Status: Dispatched

Created: 05/12/2013 1:12 PM by Administrator Administrator
Last Amended: 05/12/2013 1:12 PM by Administrator Administrator

Released: 05/12/2013 2:49 PM



The unpublished Quick Quote Award will be saved under "my unpublished Quick Quote Awards" until it is ready to be distributed to the suppliers who were invited to quote.

The Quick Quote Award template shares a lot of the same question as the Quick Quote and the answers provided for these are copied across to your Quick Quote Award notice. The additional question asked in the award notice are below:

Quick Quote Value - For statistical purposes you should enter the value of the contract under this question. **This value is not shared with other bidders.**

Date of Award - The date the Quick Quote was awarded to the successful bidder(s).

Purchase Date or Start/End Dates - For reporting purposes you should either enter the Purchase date if it is a one off purchase or the both the start and end dates if this is a term contract.

Number of Quotes received - Enter the number of quotes received in response to the quote.



Successful Bidder List - Select the Successful bidder(s) name to add them to the Successful bidder list.

Additional Information - If applicable you can add additional information for your Quick Quote Award.

Supplier Documentation – You can optionally upload a document to be sent to the successful bidder(s) and one to the unsuccessful bidder(s). They will receive these documents as attachments to the Quick Quote Award e-mail.

Supplier bidder values - For statistical, reporting and audit purposes you should enter the bids received for all the bidders invited to quote. This information will not be displayed in the public domain or shared with the bidders.

Once you have answered all the relevant questions Quick Quote Award creation is complete and you have the option to preview it, distribute it or return to your Quick Quote workspace.

What do Suppliers Receive when I release a Quick Quote Award Notice?

The successful supplier(s) will receive an e-mail informing them that they have been successful in the quotation. This e-mail will have the Quick Quote Award notice attached to it. The award notice does not disclose the value of any of the bids received. If you chose to upload a document for the successful supplier it will be attached to this e-mail.

The unsuccessful supplier(s) will receive an e-mail informing them that they have not been successful in the quotation. This e-mail will have the Quick Quote Award notice attached to it. The award notice does not disclose the value of any of the bids received. If you chose to upload a document for the unsuccessful supplier it will be attached to this e-mail.

How can I Analyse Quick Quote Activity?

A report is available which details all Quick Quote Awards made over a chosen time frame. The report is accessed from the Quick Quote Control Panel and a link is also provided on the main "reports" page. Any user with "Reporter" access can generate this report.

Quick Quote Control Panel



Quick Quote Control Panel

Quick Quote (QQ) is an online quotation facility which allows buyers to obtain competitive quotes electronically for low value requirements. Details of the QQ are created online and sent to a selected list of suppliers, who can then complete the required details and submit their quotation using the secure postbox. QQs are only distributed to the selected suppliers and are not made public on the website.

Before using the quick quote facility users should:

Ensure that the procurement/mini-competition is for low value/risk goods, services or works;

Ensure that there is no existing contract which could be accessed; and

Ensure this quotation is aligned to your local financial instructions.

For further information on the use of Quick Quote please read the Scottish Procurement Policy Note (SPPN)

Quick Quotes

Create a **New** Quick Quote Quick Quote **User Guide**

My Quick Quotes

My Unpublished Quick Quotes

My Published Quick Quotes

Buyer Quick Quotes

Buyer Unpublished Quick Quotes

Buyer Published Quick Quotes

Quick Quote Awards

View list of Quick Quotes Requiring Awards

Quick Quote Awards Report

My Quick Quote Awards

My Unpublished Quick Quote Awards

My Published Quick Quote Awards

Buyer Quick Quote Awards

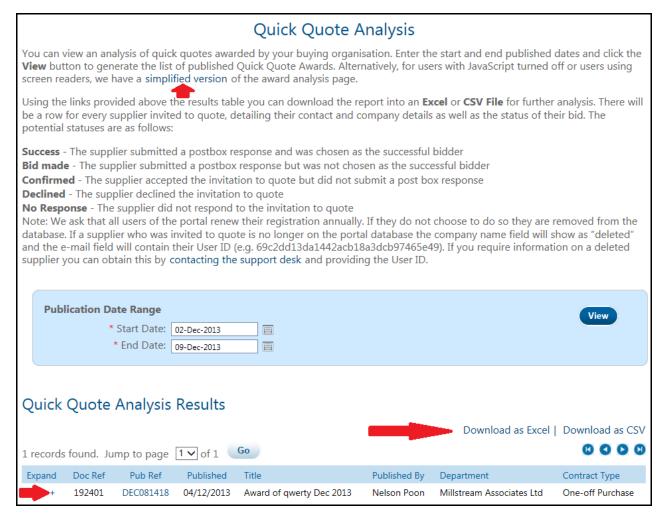
Buyer Unpublished Quick Quote Awards

Buyer Published Quick Quote Awards

The report asks for dates to be entered and then shows a list of QQ Awards published in that date period, with the option to view a simplified version, download as an Excel file or expand the details on screen.

Quick Quote Analysis





Expanding the details on screen shows all the suppliers who were invited along with associated information, the commodity categories selected for the Quick Quote, the value of bids made and the status of the supplier's bid.

There are 5 statuses for suppliers:

Success – winning bidder

Bid made – unsuccessful bidder

Confirmed – accepted the Quick Quote but did not submit a response

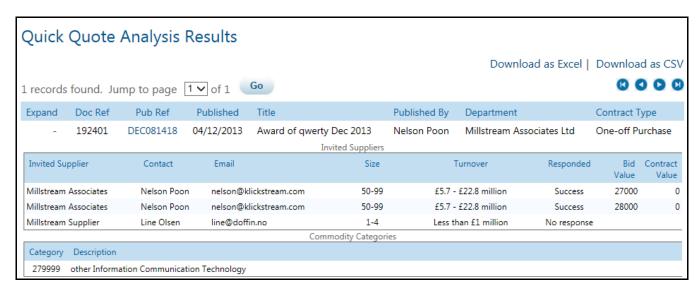
Declined – declined the invitation to quote

Unknown – did not take any action on the QQ

If a user has since been removed from the database their user ID is displayed instead. The PCS Support Staff can provide further information on the deleted user if contacted.

Quick Quote Analysis Results





The Excel file lists each supplier on an individual line which will allow the buyer to sort by any column required. The columns contained in the Excel file are as follows:

DOCUMENTID - The wizard reference number of the QQ Award Notice.

PUBLISHERREFNO – The website ID of the QQ Award Notice.

ORGANISATION – The name of your organisation.

PUBLISHDATE – The date the award notice was distributed.

PUBLISHEDBYNAME – The name of the person who distributed the QQ Award Notice.

TITLE - The title of the QQ Award Notice.

DEPARTMENT – The Department provided within the QQ Award Notice.

CONTRACTTYPE – Whether the contract is for a one off purchase or a term contract.

SUPPLIERNAME – The company name of the supplier invited to quote.

SUPPLIEREMAIL – The e-mail address of the supplier invited to quote.

SUPPLIERCONTACT – The name of the supplier invited to quote.

TURNOVERRANGE – The turnover range of the supplier invited to quote.

EMPLOYEERANGE – The employee range of the supplier invited to quote.

SUPPSTATUS – The activity status of the supplier – whether they accepted the invitation, whether they bid, whether they were awarded a contract.

BIDVALUE – If applicable, the value of the supplier's bid as provided in the QQ Award Notice.

CONTRACTVALUE - If the supplier won the contract the value of the award as provided in the QQ Award Notice.

COMMODITYCODES – The commodity code(s) selected for the Quick Quote exercise.