

Guide Contents:

What is Quick Quote?

Quick Quote Access Levels

Your Quick Quote Control Panel

How do I create a Quick Quote?

How do I Distribute a Quick Quote?

How do I Add Suppliers to a Quick Quote?

How Do I Administer a Quick Quote?

How do I Deal with Quick Quote Responses?

How do I Create a Quick Quote Award?

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

What is Quick Quote?

Quick Quote is an online quotation facility which allows you 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).

At the end of the quotation process you can create a Quick Quote Award notice which informs all bidders of the outcome. The award notice is not published in the public domain but is available to your buyer users for auditing purposes.

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 Details > Buyer Profile/User list. Select the name of the user you wish to amend, clicking save at the bottom once access levels are set.

Your Quick Quote Control Panel


Your Quick Quote Control Panel links to all your Quick Quotes and Quick Quote Awards. You can filter this by those for your buyer organisation and those created by your own registration. It is accessible by clicking the 'Quick Quote' link in the 'Notices' menu of your Buyer Control Panel.

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.

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

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 Nature

You will be asked to provide a title for your Quick Quote and select the nature of the contract. Once you do this click “Confirm”.

Create Quick Quote page

Create Quick Quote

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 *Quote Details* 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 asterix (*)

Quote Details

* Title

Services Contract

* Contract Type Supply Contract

Works Contract

Once you have clicked “Confirm” you will be taken to the question list where you can work through each question by entering your answer and clicking the ‘Next’ button. Your answer to each question is stored when the “Next” button is clicked and you can stop at any point during the process and return later to complete all the questions. “Save and Exit” will save what you’ve done up to that point and return you to your Quick Quote Status page.

The Quick Quote form is made up of the following Questions:

Purchasing authority details

Details of your organisation, 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.

Quantity required

An optional field where you can state the quantity required.

Deadline for quotes

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.

Other 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 Additional Documents function and Questions and Answers.

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 click the “Distribute the Notice” link to start the distribution process:

Quick Quote Creation Completed page

Quick Quote Creation Completed

This Quick Quote is now complete and ready for you to invite Suppliers to quote. Please *click* the **Distribute** button to select your preferred suppliers.

Note: This Quick Quote will not be published until the supplier distribution process is complete.

Quick Quote Details

Quick Quote ID: 78306
Title: Asbestos Removal
Type Of Contract: Works Contract

Distribute **Cancel**

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 Select Suppliers for a Quick Quote?

Quick Quote Distribution Page

Distribute Quick Quote

To complete the publication of this Quick Quote you must select one or more suppliers for distribution. Suppliers can be added to your Distribution List from the Matching Suppliers section which automatically lists suppliers which match the commodity categories specified in this Quick Quote.

Select Suppliers to Quote

[Distribution List](#) [Matching Suppliers](#)

Your Distribution List contains all of the suppliers you have invited to Quote in this notice. Currently you have not selected any suppliers.

You can select suppliers to add to your Distribution List from the following:

[Matching Supplier List](#) - Suppliers that match the commodity categories specified in this Quick Quote. You can also use this tool to search the entire supplier database.

[Distribute](#) [Cancel](#)

To find Suppliers:

Matching Suppliers provides a tool to search the entire database of supplier registrations. This presents you with a list of suppliers matching the commodity codes selected during Quick Quote creation.

You can further filter these lists using any combination of the parameters as follows:

Exclude Commodity Categories – Turn off the commodity category(s) you selected during Quick Quote creation to search the whole database of supplier registrations.

Company Name – Search for a specific company.

Postcode – Search for suppliers within a specific postcode area, i.e. AB, EH4

How do I Add Suppliers to a Quick Quote?

To add suppliers that you want to invite to quote to the distribution list you tick the box to the left hand side of the supplier name and click "Add". You can add multiple suppliers at one time.

Adding suppliers from Matching Suppliers tab

Select Suppliers to Quote

Distribution List **Matching Suppliers**

The Matching Supplier List below is a list of all the suppliers that match the commodity categories specified in this Quick Quote. Select the checkbox next to the supplier(s) you wish to invite to quote and *click* the **Add** button. You can also refine your search by entering new search criteria including the ability to exclude commodity categories as some suppliers may have different categories in their supplier profile.

Refine Search

Exclude Commodity Categories

Company Name: Postcode: e.g EH4

Matching Supplier List

3 records found. Jump to page of 1

<input checked="" type="checkbox"/>	DD Asbestos Solutions Ltd Susan Chadwick - susan@DDASL.com
<input type="checkbox"/>	Millstream's Utility Marjorie Robertson - marjorie@klickstream.co.uk
<input checked="" type="checkbox"/>	Star Environmental and Building Services Ltd Billy O'Reilly - billy@seabsl.co.uk

You can perform as many searches as required, adding suppliers to the distribution list and then performing a new search.

Each supplier you add is listed in the Distribution list tab. If you wish to remove someone from the distribution list you can click "Delete" next to their name.

Delete Supplier from Distribution List

Select Suppliers to Quote

[Distribution List](#) [Matching Suppliers](#)

[Delete](#) Billy O'Reilly - billy@seabsl.co.uk

[Delete](#) Susan Chadwick - susan@DDASL.com

[Distribute](#) [Cancel](#)

Once you are happy with your distribution list click "Distribute". Clicking "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.

Distribute Quick Quote

Select Suppliers to Quote

[Distribution List](#) [Matching Suppliers](#)

[Delete](#) Marjorie Robertson - marjorie@klickstream.co.uk

[Delete](#) Billy O'Reilly - billy@seabsl.co.uk

[Delete](#) Susan Chadwick - susan@DDASL.com

[Distribute](#) [Cancel](#)

The e-mail address in the "from" field of this e-mail is marked as your own so any direct responses to the e-mail will be sent to your registered e-mail address.

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.

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 "View Distribution List".

Quick Quote Status Page

Published Details

ID: SEP085924

Action: [View Published Quick Quote text](#)
[Change Quick Quote Deadline](#)
[Cancel Quick Quote](#)

Title: Asbestos Removal

Published: 15/09/2011 14:24 by Susan Chadwick

Deadline: 29/09/2011 at 12:00

Archived Date: -

Visible On Site: No, Quick Quotes are never displayed on the website

Distribution List: 4 supplier(s) currently in distribution list

[View Distribution List](#)

[Add supplier to distribution list](#)

Quick Quote Distribution List

Quick Quote Supplier Status

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
12	Karen Bothwell	KB Enterprises Ltd	Declined - View Reason	22/09/2011 17:45	Bruce Graffin
6	Marjorie Robertson	Millstream's Utility	No Response	15/09/2011 14:22	Bruce Graffin
5	Billy O'Reilly	Star Environmental and Building Services Ltd	No Response	15/09/2011 14:19	Bruce Graffin
4	Susan Chadwick	DD Asbestos Solutions Ltd	Confirmed	15/09/2011 14:19	Bruce Graffin

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

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 available from their Supplier's Quick Quote workspace.

Note: If a supplier has not responded you may wish to contact them to ensure that they received notification of the invite.

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

How do I Create a Quick Quote Award?

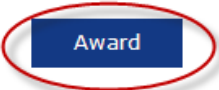
From your Quick Quote Control Panel select the link "My Published Quick Quotes" or "Buyer Published Quick Quotes" if you did not create the Quick Quote.

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

Pre-Publication Details

Document ID: 190201
Action: [View Pre-Publication Quick Quote text](#)
Title: 5 Chairs
Nature Of Contract: Supply Contract
Status: Dispatched
Created: 08/08/2011 16:19 by Administrator Administrator
Last Amended: 09/08/2011 11:12 by Administrator Administrator
Released: 10/08/2011 14:47



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.