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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).

Quick Quote Access Levels

In order that Contracting Authority 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 'Purchasers > Organisations Details > Your Buyers Profile' from the left-hand menu and selecting to amend user registration.

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 authority and those created by your own registration. It is accessible from the left hand menu by selecting 'Purchasers>Quick Quote' or by clicking the 'Quick Quote' link from your Authority Homepage.

Quick Quote Control Panel

The screenshot shows the 'Quick Quote Control Panel' interface. At the top, there is a heading 'Quick Quote Control Panel' followed by a descriptive paragraph: 'Quick Quote (QQ) is an online quotation facility which allows purchasing authorities 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 tender postbox. QQs are only distributed to the selected suppliers and are not made public on the website.'

The interface is divided into two main columns:

- Quick Quotes:**
 - [Create a New Quick Quote](#)
 - [Quick Quote User Guide](#)
 - My Quick Quotes**
 - [My Unpublished Quick Quotes](#)
 - [My Published Quick Quotes](#)
 - Authority Quick Quotes**
 - [Authority Unpublished Quick Quotes](#)
 - [Authority Published Quick Quotes](#)
- Quick Quote Awards:**
 - [View list of Quick Quotes Requiring Awards](#)
 - My Quick Quote Awards**
 - [My Unpublished Quick Quote Awards](#)
 - [My Published Quick Quote Awards](#)
 - Authority Quick Quote Awards**
 - [Authority Unpublished Quick Quote Awards](#)
 - [Authority 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

The screenshot shows the 'Create Quick Quote' form. It starts with a heading 'Create Quick Quote' and a welcome message: '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 a *'.

The 'Quote Details' section contains:

- * Title:
- Contract Type:
 - Services Contract
 - Supply Contract
 - Works Contract

At the bottom of the form, there are two buttons: 'Confirm' (circled in red) and 'Cancel'.

Once you have clicked “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” buttons are clicked 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 authority 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.

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 Questions and Answers and Additional Documents function. Individual documents must not exceed 10Mb in size

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: 190218
Title: 5 Chairs
Type Of Contract: Supply 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?

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 will allow you to find suppliers who have not set up a *Supplier Finder* Profile.

Both lists will present 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.

Region – Search for suppliers who are registered in a certain region.

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.

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: **Region:** **Postcode: e.g EH4** **Search**

Matching Supplier List

1 entries found. Page 1 of 1 **Add**

Riverside Design
supplier4 supplier4 - supplier4@riversidedesign.co

Distribute **Cancel**

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.

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.

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.

Published Details

ID: AUG079985
Action: [View Published Quick Quote text](#)
[Change Quick Quote Deadline](#)
[Cancel Quick Quote](#)
Title: 5 Chairs
Published: 05/08/2011 15:32 by Administrator Administrator
Deadline: 15/08/2011 at 12:00
Archived Date: -
Visible On Site: No, Quick Quotes are never displayed on the website
Distribution List: 3 supplier(s) currently in distribution list
[View Distribution List](#)
[Add supplier to distribution list](#)

Additional Notice Options

Listed below are the additional options available for this notice.

Additional Information: 2 update(s)
Additional Documents: 2 document(s)
Question and Answers: 1 question(s)
Postbox: 1 response(s)

[View/Change List of Additional Information](#)
[View/Change Additional Document List](#)
[View Questions and Answers](#)
[View Submission Postbox](#)

To Change the Quick Quote/Postbox Deadline

To Cancel the Quick Quote

To view the Current Distribution List for the Quick Quote

To ADD a New Supplier after the Quick Quote has been Distributed

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 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
11727	Francis Boyle	Riverside Design	No Response	11/08/2011 10:20	Administrator Administrator
11724	Andrew Bay	Riverside interiors	No Response	10/08/2011 14:40	Administrator Administrator
11704	Lisa Duncan	Lisa's Design Services	Declined - View Reason	10/08/2011 14:40	Administrator Administrator
11699	Andrea River	Riverside Bathrooms design	Confirmed	09/08/2011 11:23	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 10/08/2011.

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 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?

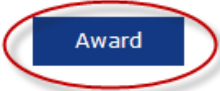
From your Quick Quote Control Panel select the link “My Published Quick Quotes” or “Authority Published Quick Quotes” if you did not create the Quick Quote.

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.