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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 Buyers > Buyers Profile/User List under the Organisation heading and selecting to amend user registration.

Your Quick Quote Control Panel

Your Quick Quote Control Panel links to all the Quick Quotes and Quick Quote Awards for your organisation. You can select whether you wish to view all of the organisations Quick Quotes or only those created by your own registration. It is selecting 'Buyers in the top menu > Quick Quote'.

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

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 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

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 *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 asterisk (*)

Quote Details

* T'	Estate.
* Title:	
* Contract Type:	O Services Contract
	Supply Contract
	O Works Contract
	Confirm 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:

Buyer 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.

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.

Terms and Conditions

This question displays a list of documents from your organisation's document library. If a document is selected from the list of available documents, a standard terms and conditions hyperlink will appear on your Quick Quote invitation, linking to the selected document

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 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



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.

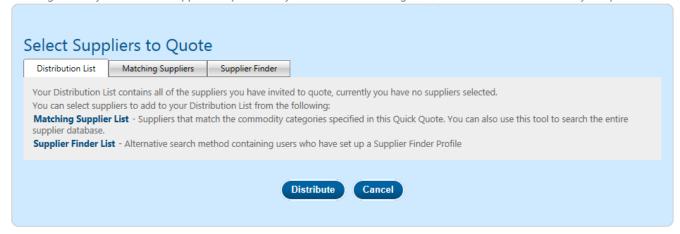


How do I Select Suppliers for a Quick Quote?

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.

Alternatively, you are encouraged to select suppliers for distribution from the Supplier Finder section. Supplier Finder is a supplier sourcing directory which allows suppliers to provide buyers with details of the goods, works and services which they can provide.



There are two ways in which to find Suppliers:

Supplier Finder allows you to search the *Supplier Finder* directory.

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:

Supplier Finder:

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

Only Show SMEs - Restrict your search to those suppliers who recorded that they have less than 250 employees.

Company Name - Search for a specific company.

Region – Search for suppliers who operate in a certain region.

Keywords – Search for specific keywords to find suppliers who have used these words in their Supplier Finder profile.

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

Matching Suppliers:

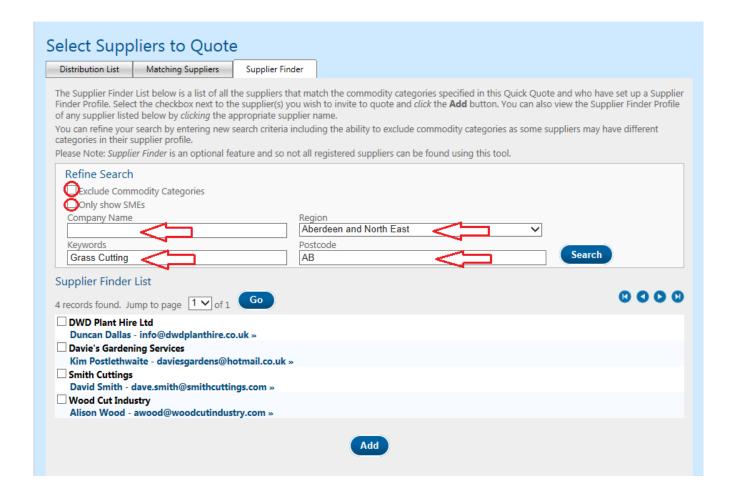
Exclude Commodity Categories – Turn off the commodity category(s) you selected during Quick Quote creation to search the whole database of supplier registrations.

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

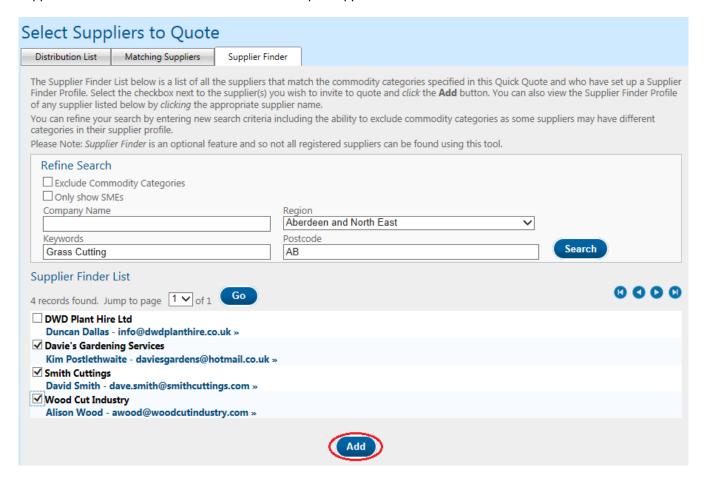






How do I Add Suppliers to a Quick Quote?

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.



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.

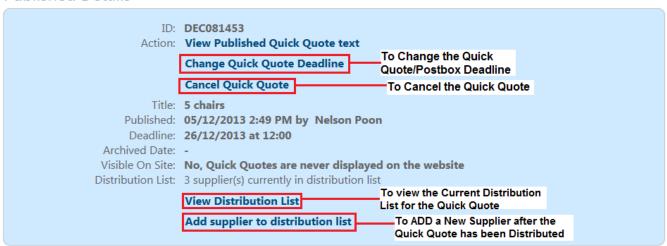
How Do I Administer a Quick Quote?

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



Additional Notice Options

Listed below are the additional options available for this notice.

Additional Information: 0 update(s) View/Change List of Additional Information

Additional Documents: 0 document(s) View/Change Additional Document List

Postbox: 0 response(s) View Submission Postbox

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

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 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: 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 email.

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 (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





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

You can view an analysis of quick quotes awarded by your buying organisation. Enter the start and end published dates and click the **View** button to generate the list of published Quick Quote Awards. Alternatively, for users with JavaScript turned off or users using screen readers, we have a simplified version of the award analysis page.

Using the links provided above the results table you can download the report into an **Excel** or **CSV File** for further analysis. There will be a row for every supplier invited to quote, detailing their contact and company details as well as the status of their bid. The potential statuses are as follows:

Success - The supplier submitted a postbox response and was chosen as the successful bidder

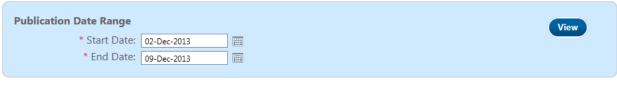
Bid made - The supplier submitted a postbox response but was not chosen as the successful bidder

Confirmed - The supplier accepted the invitation to quote but did not submit a post box response

Declined - The supplier declined the invitation to quote

No Response - The supplier did not respond to the invitation to quote

Note: We ask that all users of the portal renew their registration annually. If they do not choose to do so they are removed from the database. If a supplier who was invited to quote is no longer on the portal database the company name field will show as "deleted" and the e-mail field will contain their User ID (e.g. 69c2dd13da1442acb18a3dcb97465e49). If you require information on a deleted supplier you can obtain this by contacting the support desk and providing the User ID.



Quick Quote Analysis Results



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

Download as Excel | Download as CSV

L records	found. Ju	mp to page	1 v of 1	Go					0	0 0 0
Expand	Doc Ref	Pub Ref	Published	Title		Published By	Department		Contract Type	
-	192401	DEC081418	04/12/2013	Award of qwe	erty Dec 2013	Nelson Poon	n Millstream Associates Ltd		One-off Purchase	
					Invited Suppliers					
Invited Su	pplier	Contact	Email		Size		Turnover	Responded	Bid Value	Contract Value
Millstream	Associates	Nelson Poon	nelson@k	lickstream.com	50-99	£5.7 -	£22.8 million	Success	27000	0
Millstream	Associates	Nelson Poon	nelson@k	lickstream.com	50-99	£5.7 -	£22.8 million	Success	28000	0
Millstream	Supplier	Line Olsen	line@doff	īn.no	1-4	Less t	han £1 million	No response	ė.	
				С	ommodity Categori	es				
Category	Description									
279999	other Inform	ation Communicati	on Technology							

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.