

Sell2Wales

Buyer User Guide – Quick Quote



Llywodraeth Cymru
Welsh Government

www.cymru.gov.uk

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What is Quick Quote?

Quick Quote is an online quotation facility which allows buyers 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 Postbox (for more information on this please see the 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.

Quick Quote access levels

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

Quick Quote Editor

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

Quick Quote Publisher

Allows you 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 Profile / User list'. From the user list the Controller can select to amend user registration.



Your Quick Quote Control Panel

Your Quick Quote Control Panel is access from your Control Panel by clicking “Quick Quotes”. It provides links to all your Quick Quotes and Quick Quote Awards.

Quick Quote Control Panel

Quick Quote Control Panel

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.

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](#)
- [Quick Quote Awards Report](#)

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

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

* Title

* Contract Type Services Contract
 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 using the Next button or by using the drop down menu “Go to Question”.

Your answer to each question is stored when the “Next” or “Save&Exit” 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 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.



Quick Quote Timescales

The deadline for completed quotes to be submitted to the 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.

Note! For the suppliers there is a maximum size limit of 10Mb for any document to be sent back via the Postbox. The size of a Postbox response is not to exceed 30Mb in total. The Suppliers can create as many responses as necessary as the system allows multiple submissions.

Question and Answer Administrator

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

Postbox Opener

Select the user(s) whom you want to open the 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 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: 630
Title: Plant hire with driver
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?

Distribute 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.

Select Suppliers to Quote

Distribution List Matching Suppliers Supplier Finder

Your Distribution List contains all of the suppliers you have invited to quote, currently you have no suppliers selected.

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.

Supplier Finder List - Alternative search method containing users who have set up a Supplier Finder Profile

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. CF, CF4



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. CF, CF4

Distribute Quick Quote - Supplier finder

Select Suppliers to Quote

Distribution List Matching Suppliers **Supplier Finder**

The Supplier Finder List below is a list of all the suppliers that match the commodity categories specified in this Quick Quote and who have set up a Supplier Finder Profile. Select the checkbox next to the supplier(s) you wish to invite to quote and click the **Add** button. You can also view the Supplier Finder Profile of any supplier listed below by *clicking* the appropriate supplier name.

You can 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.

Please Note: *Supplier Finder* is an optional feature and so not all registered suppliers can be found using this tool.

Refine Search

Exclude Commodity Categories Only show SMEs

Company Name:

Region:

Keywords:

Postcode:

Search

Supplier Finder List

1 records found. Jump to page of 1 **Go**

<input type="checkbox"/>	DWD Plant Hire Ltd John Cardiff - info@dwdplanthire.co.uk
--------------------------	---

Add

Distribute **Cancel**



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.

Supplier Finder List

Please select a supplier from the list.

1 records found. Jump to page 1 of 1 **Go**

DWD Plant Hire Ltd
John Cardiff - info@dwdplanthire.co.uk »

Add

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 "Remove" 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.



Quick Quote Status

Quick quote status

Pre-Publication Details

Document ID: 630 [View Pre-Publication Quick Quote text](#)
Title: Plant hire with driver
Nature Of Contract: Supply Contract
Status: Dispatched
Created: 13/05/2013 15:35 by Jane Brown
Last Amended: 13/05/2013 15:44 by Jane Brown
Released: 13/05/2013 15:54

Published Details

ID: MAY045456
Action: [View Published Quick Quote text](#)
[Change Quick Quote Deadline](#)
[Cancel Quick Quote](#)
Title: Plant hire with driver
Published: 13/05/2013 15:54 by Tone Smaasund Auth
Deadline: 22/05/2013 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](#)

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 to the Quick Quote after it 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 “View 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
64	John Cardiff	DWD Plant Hire Ltd	Confirmed	13/05/2013 15:54	Jane Brown
68	Andrew Bay	Bay Supplies and plant hire	No Response	13/05/2013 15:54	Jane Brown
66	Francis Doyle	Riverside Plant hire	Declined - View Reason	13/05/2013 15:54	Jane Brown
67	Lisa Duncan	Duncan's Truck and Plant hire	No Response	14/05/2013 10:31	Jane Brown

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 Published Quick Quote page you'll see that this Quick Quote was originally distributed on the 13/05/2013.

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.

Please note: If a supplier's status is showing as “No Response” it is advised that you contact them to ensure they have received the invitation.

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 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 in the appropriate area.

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:	630 View Pre-Publication Quick Quote text
Title:	Plant hire with driver
Nature Of Contract:	Supply Contract
Status:	Dispatched
Created:	13/05/2013 15:35 by Jane Brown
Last Amended:	13/05/2013 15:44 by Jane Brown
Released:	13/05/2013 15:54

[Award](#)

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 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.

Quick Quotes	Quick Quote Awards
<ul style="list-style-type: none">▪ Create a New Quick Quote▪ Quick Quote User Guide 📖	<ul style="list-style-type: none">▪ View list of Quick Quotes Requiring Awards▪ Quick Quote Awards Report
My Quick Quotes <ul style="list-style-type: none">▪ My Unpublished Quick Quotes▪ My Published Quick Quotes	My Quick Quote Awards <ul style="list-style-type: none">▪ My Unpublished Quick Quote Awards▪ My Published Quick Quote Awards
Authority Quick Quotes <ul style="list-style-type: none">▪ Authority Unpublished Quick Quotes▪ Authority Published Quick Quotes	Authority Quick Quote Awards <ul style="list-style-type: none">▪ Authority Unpublished Quick Quote Awards▪ Authority 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

Quick Quote Analysis

You can view an analysis of quick quotes awarded by your authority. 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.

Publication Date Range

* Start Date:

* End Date:

View

Quick Quote Analysis Results

[Download as Excel](#) | [Download as CSV](#)

1 records found. Jump to page of 1 **Go**

Expand	Doc Ref	Pub Ref	Published	Title	Published By	Department	Contract Type
	637	MAY045475	14/05/2013	Award of Plant hire with driver	Jane Brown	Purchasing	One-off Purchase

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 Sell2Wales Support Staff can provide further information on the deleted user if contacted.



Quick Quote Analysis Results

[Download as Excel](#) | [Download as CSV](#)

1 records found. Jump to page of 1 [Go](#) ⏪ ⏩ ⏴ ⏵

Expand	Doc Ref	Pub Ref	Published	Title	Published By	Department	Contract Type
-	637	MAY045475	14/05/2013	Award of Plant hire with driver	Jane Brown	Purchasing	One-off Purchase
Invited Suppliers							
Invited Supplier	Contact	Email	Size	Turnover	Responded	Bid Value	Contract Value
DWD Plant Hire Ltd	John Cardiff	info@dwdplanthireltd.co.uk	1	Less than £1 million	Success	1234	0
Bay Supplies	Andrew Bay	andy@bay.co.uk	26 to 100	£5.7 - £22.8 million	Declined		
Riverside Plant hire	Francis Doyle	fdoyle@rplantltd.co.uk	Unknown	Less than £1 million	Bid Made	5234	
Commodity Categories							
Category	Description						
60180000	Hire of goods-transport vehicles with driver						

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.
- EMPLOYEEERANGE – 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.