

Department	
Responsibility/Role	
File Name	Creating a Quote ITB_SPD
Revision	
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Last Changed by	
Status	

Creating a Quote ITB

Trigger:

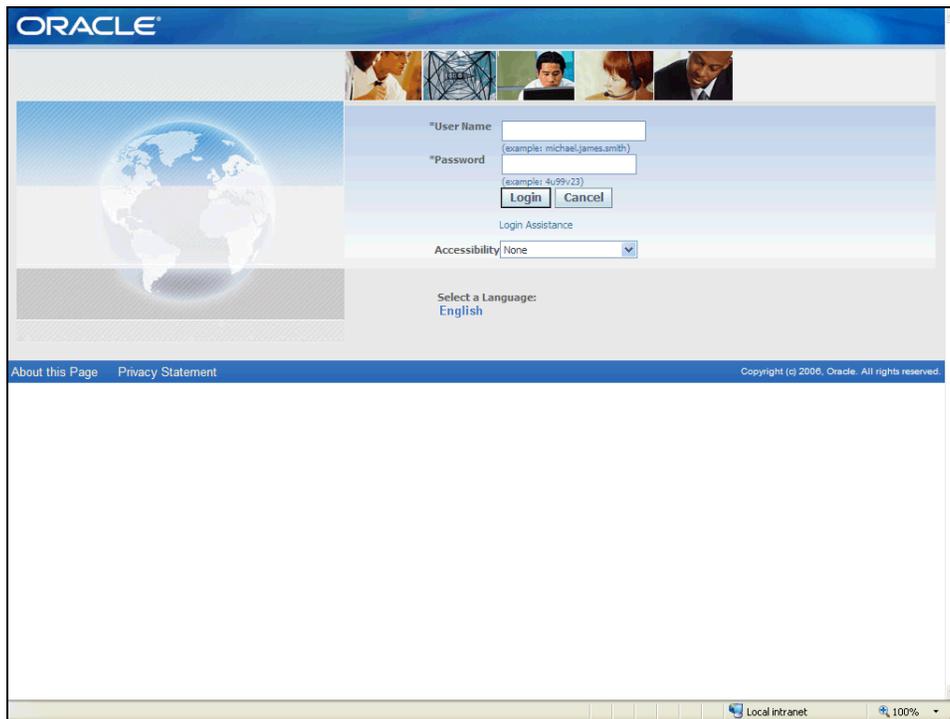
Required Field(s)	Comments

Output - Result(s)	Comments

Additional Information

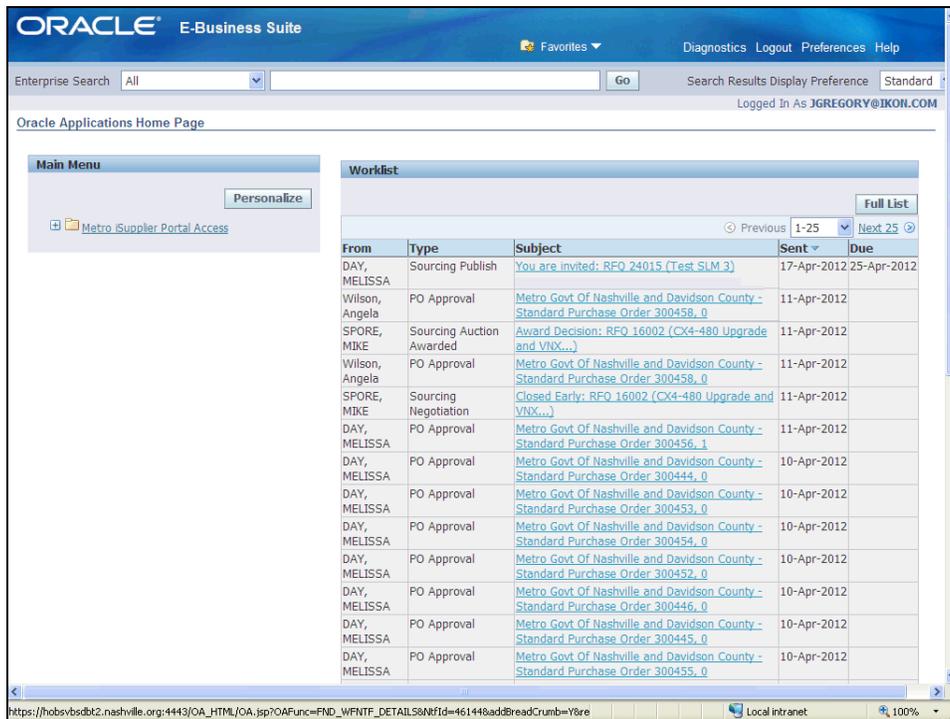
Procedure

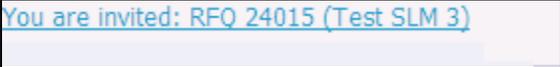
Step	Action
1.	When submitting a quote, Metro will only take Electronic Responses going forward. We will NOT accept any paper quotes.



Step	Action
2.	Click in the User Name field. <input type="text"/>
3.	Enter your company User Name Example: Enter " jgregory@ikon.com "
4.	Click in the Password field. <input type="password"/>

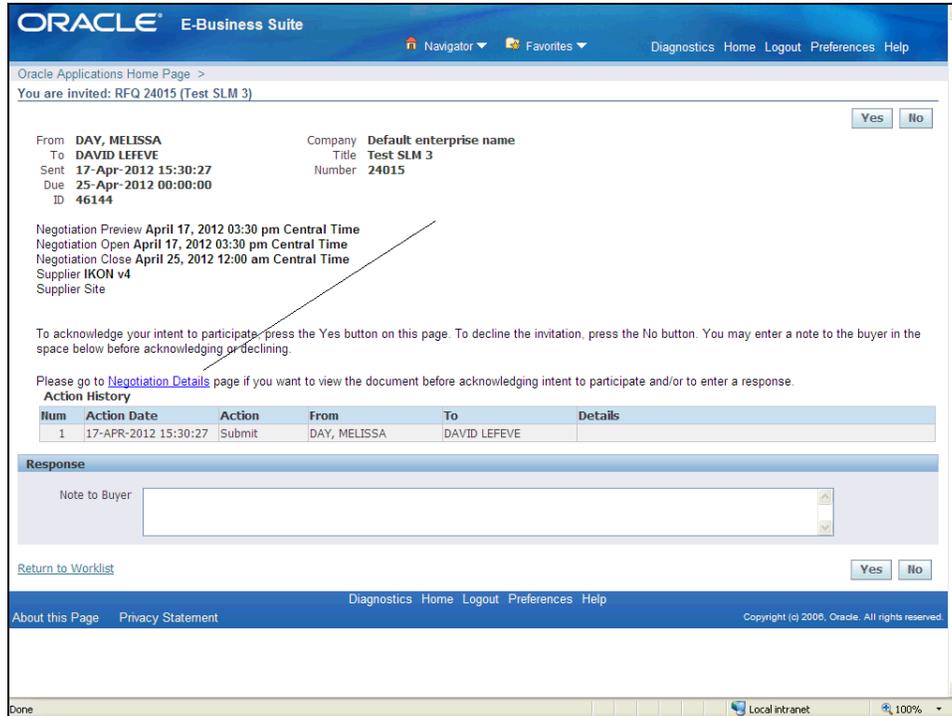
Step	Action
5.	Enter your companies Password Example: Enter " Metrogov1 "
6.	Click Login 



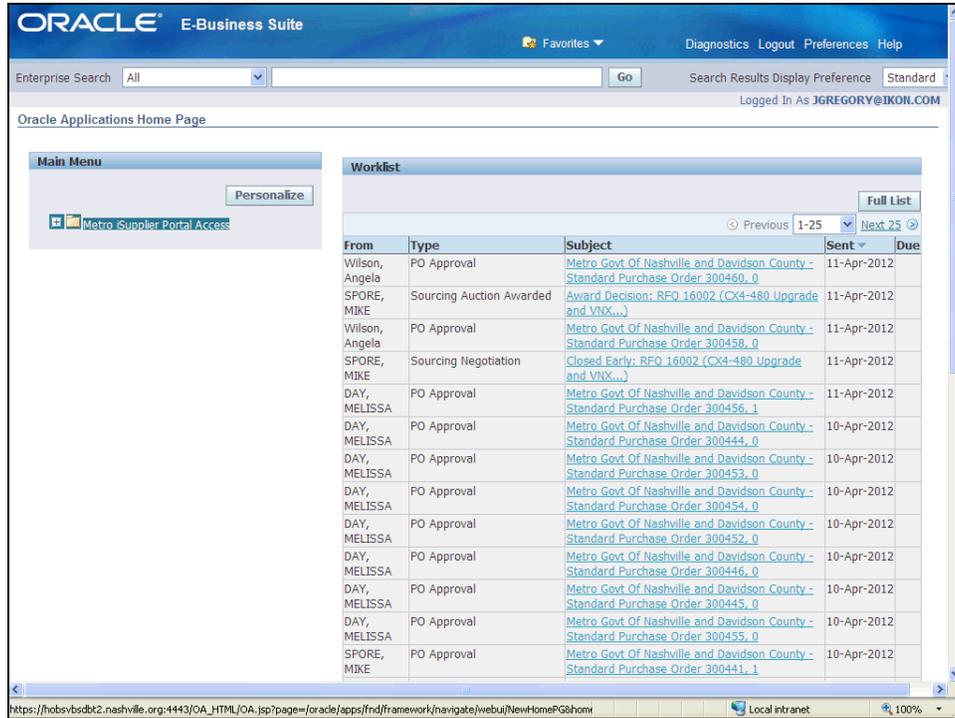
Step	Action
7.	You will see the following message: You are invited: RFQ 24015 (Test SLM 3) To begin adding your information, you will need to select the subject line. 

System Process Document

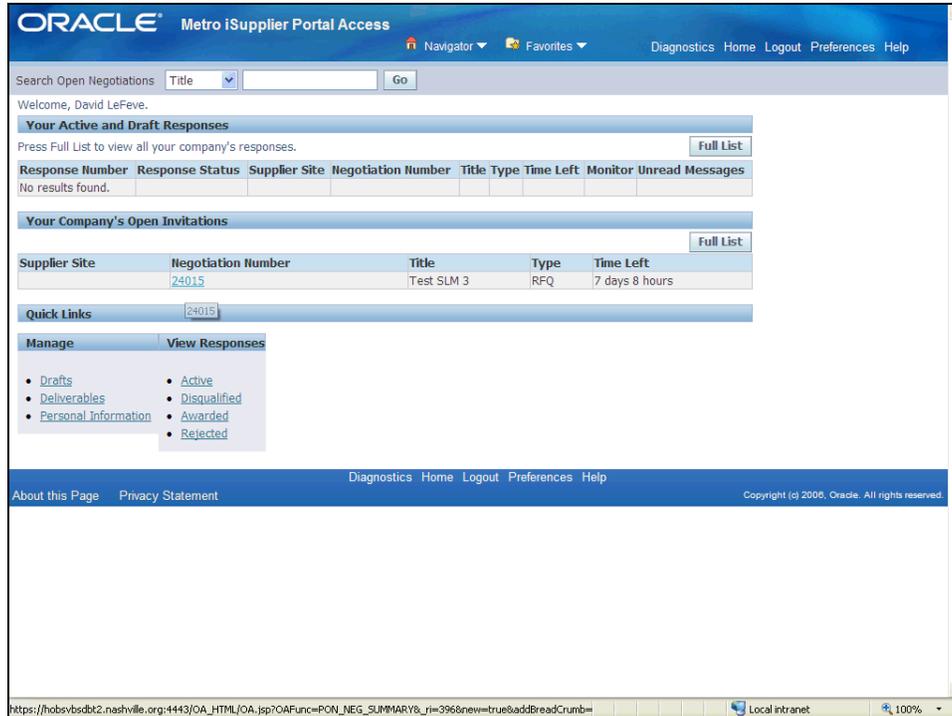
Creating a Quote ITB

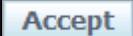


Step	Action
8.	<p>To view the Negotiation, please click the link</p> <p>Once you have viewed all necessary documentation and have decided to make a bid you will need to click Yes.</p>



Step	Action
9.	Click to access the Sourcing Home Page 
10.	Click the Sourcing Home Page link.



Step	Action
11.	Find your negotiation and select it 
12.	Click Create Quote 
13.	Click Go 
14.	Please read the Terms and Conditions before going forward.
15.	Once you have read and accepted the Terms and Conditions, Click Accept 
16.	You can view all Requirements at this time by expanding all.
17.	Click the scrollbar to continue reviewing all the requirements.
18.	You will need to supply Metro with all the Subcontractors names if any that you will be using during the project. Also, please provide their UNSPSC Code, Amount they will be paid, and their Ownership Classification as this time. Click Add Another Row to add all subcontractors associated with the project. 
19.	Click the Search for Subcontractor Name button to search for their company name 

Step	Action
20.	Click in the Search By field. 
21.	Enter the vendors name in the Search By field. Example: Enter " barge "
22.	Click Go 
23.	Once you have found the vendor, Click the Quick Select button. 
24.	Click in the UNSPSC Code field. 
25.	Enter the desired information into the UNSPSC Code field. Enter " 721000 ".
26.	Click in the Amount field. 
27.	Enter the amount you will be paying the Subcontractor in Amount field Example: Enter " 2500 "
28.	If the subcontractor is a small business, minority owned or other classification, Click Ownership Classification and define. 
29.	Select their Classification Example: Small Business 
30.	Please enter the RFQ Number from the top of Screen Example: Enter " 24015 "
31.	Click Lines 
32.	Click Quote Price 
33.	Enter the Quote Price Example: Enter " 5000 "
34.	Click Continue 

System Process Document

Creating a Quote ITB

Step	Action
35.	Click Submit 
36.	End of Procedure.