

## Quick Quote facility

#### What is Quick Quote?

Quick quote is an online quotation facility which allows Users to obtain competitive quotes electronically for low value requirements. Details of the quick quote 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 post-box.

### When would I use the Quick Quote facility?

Users would use this function to obtain online quotes from suppliers when the value of the requirement is <£50,000. Using the online quick quote facility ensures that Users can easily record details of the quotations they have received which, complies with section 12.6 of the Contracts Rules of Procedures

Suppliers respond to the quick quote via the tender post-box. This allows suppliers to quickly and efficiently provide details of their quotation and record details of the opportunities they have responded to.

### How do I get Access?

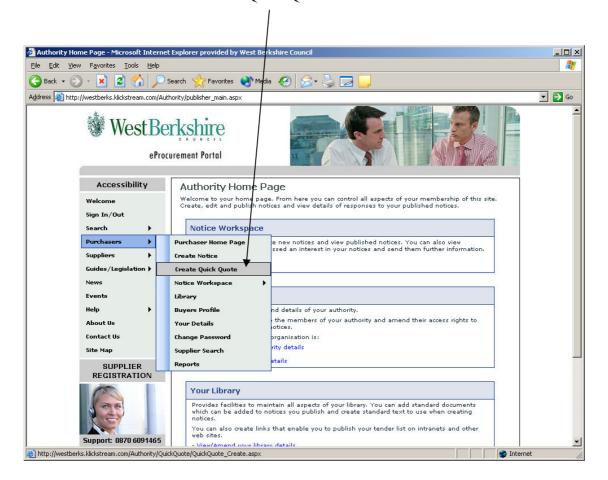
Access to the Quick Quote facility is available through the Procurement Portal located in Procurement on the Intranet. All Users must register on the Portal in the first instance, please contact Charlie Piechniczek in Central Procurement Team at Faraday Road on 01635 519965 who will take you through the process and provide you with a Quick Quote manual.



### **Procedure for Creating Quick Quote**

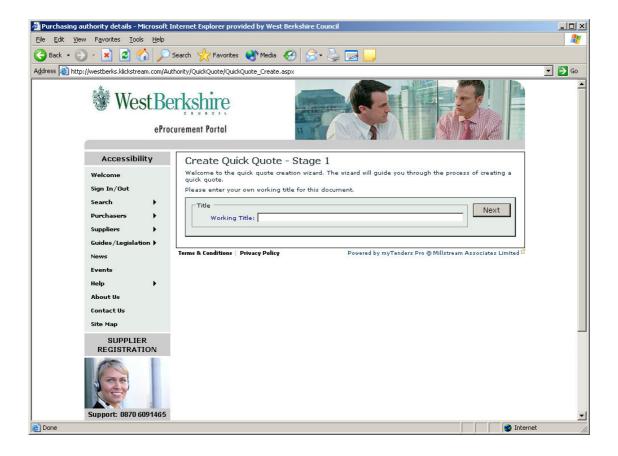
Log into the Portal through <a href="http://westberks.klickstream.com/">http://westberks.klickstream.com/</a> and insert your email address and password.

# **Step 1** Click on 'Purchasers' then 'Create Quick Quote'



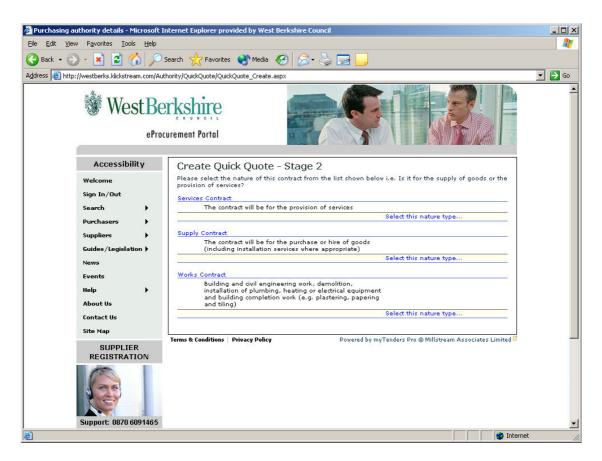


Insert title of Project.



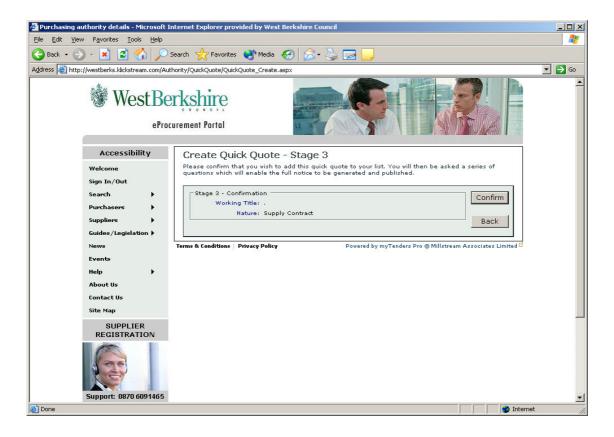


Select type of Contract – 1. Supply 2. Services or 3. Works





Click 'Confirm' to proceed.





This screen provides you with a list of questions that you will be asked to complete, click 'next'.





Complete as requested including a contact name and telephone number, click 'next'.





This screen requires an exact description of goods or services to be provided. Please ensure where appropriate this includes any specifications/standards suppliers must comply with, click 'next'.





Quantity of overall goods/service is required in this screen, click 'next'.





Deadline date and time need to be inserted in this screen.

Depending on the scope of the goods/service, please ensure you allow sufficient time for suppliers to compile their quotations, taking into account any holiday periods. Click 'next'.





Insert any additional information you may feel relevant eg. You may require suppliers to attend a site visit before submitting their quotation. Click 'next'.





In this screen you must select a commodity code/s relating to your requirement. Click on 'add' to select codes, and then click 'next'





This next screen will ask you if you want to attach any documents relating to your enquiry that suppliers will be able to download from the Portal eg. This may be a sketch or a plan.

Also, this will manage any questions that come in from suppliers, where your answer will be sent to **all** suppliers quoting. Click 'next'.



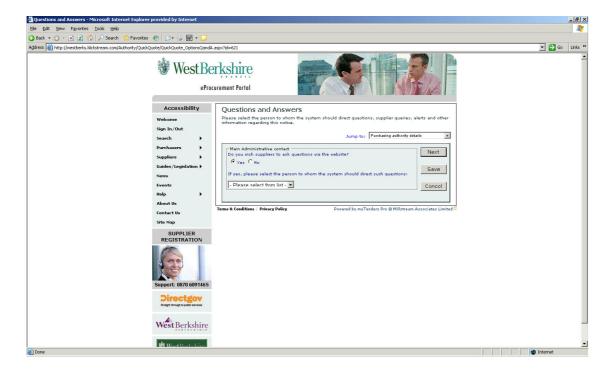


If you click on additional documents in the previous screen then you will be requested to attach them here. Click 'next' once attached.





If you clicked to include Questions & Answers in step 12 you will need to complete these fields which instructs the Portal where to send them. Click 'next'.





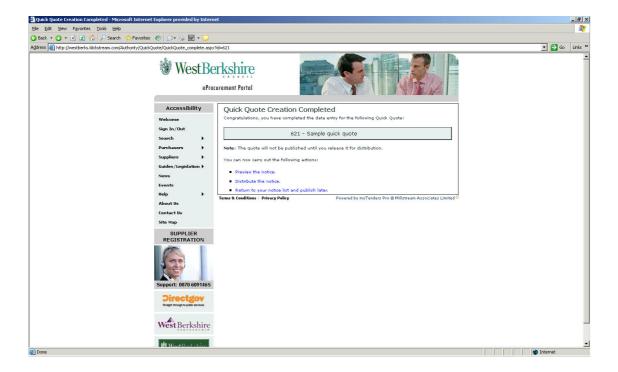
Here you need to nominate one or more Users who will be responsible for unlocking the tender post box after the deadline date/time for tender returns. Click 'next'





You have now completed your enquiry. Several options are available here 1. Preview your notice. 2. Distribute notice or 3. Publish later.

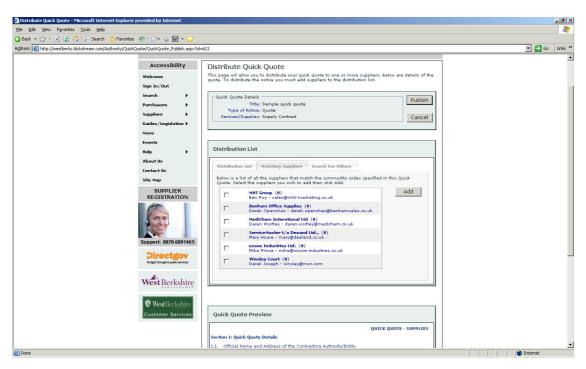
If you decide to distribute now then click the link.





By clicking distribute notice in step 16 you now need to select your suppliers you wish to invite to quote.

In the distribution list (Matching Supplier tab) you will be given a list of Suppliers who have registered on our Portal for the commodity codes you selected in step 11. Please select a minimum of 3 from the list, click 'add' then click 'publish'. This will then send the enquiry direct to these Suppliers.

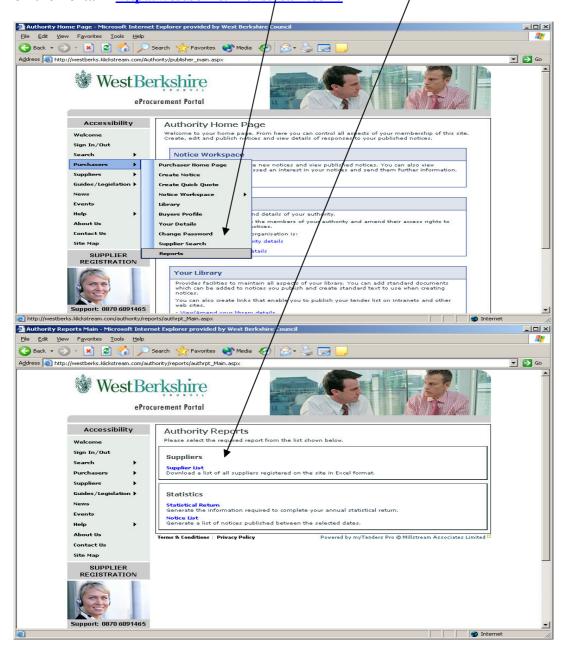


#### **Important Note on Suppliers**

Suppliers that have registered on the WBC Portal may not necessarily have been through our approval process (which is normally carried out for large projects). Users should therefore satisfy themselves that, any suppliers they commit to, can provide the goods/services in question to the standards and delivery required. Should you require further information on this please contact the Procurement Unit on Tel: 01635 519860 or email procurement@westberks.gov.uk



Prior to creating a quick quote Users can check suppliers that have already registered on our Portal by going to reports then click on Supplier list. If Users require a specific supplier that is not listed then they should prompt them to register on the Portal – <a href="http://westberks.klickstream.com/">http://westberks.klickstream.com/</a>

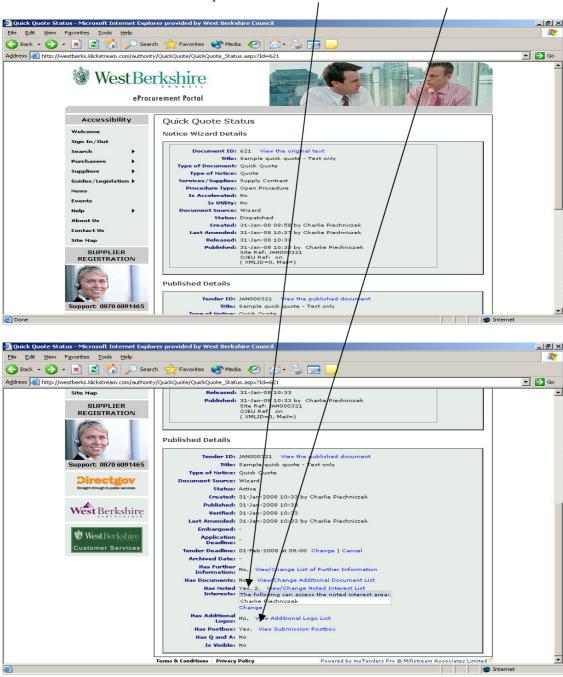


Users will also need to ensure that any new Suppliers they intend to procure from are set up in the Agresso System, using the appropriate 'Request for New Supplier Form'.



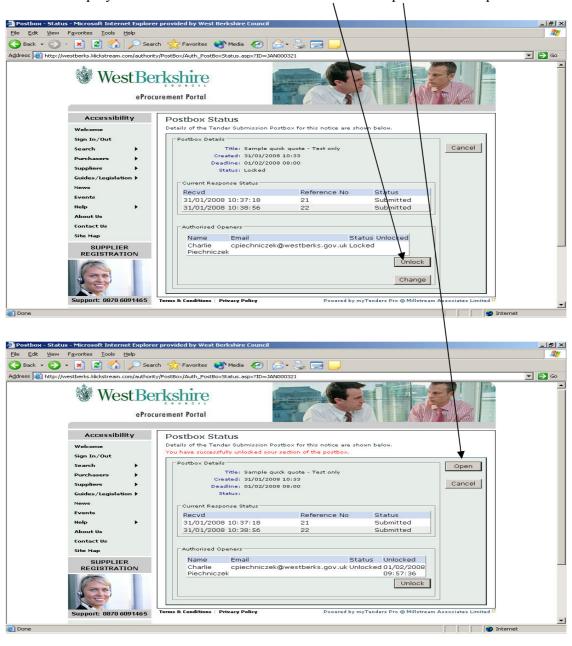
#### **Return of quotations**

Once the tender return date/time has lapsed, Users who were nominated to unlock the tender post box in step 15 will be prompted by an email to log in to the Portal and unlock. You can see in this screen that 2 quotes have been received. Click on 'Has Post Box'.





This then displays the Post Box status. Click 'unlock' then 'open' to reveal quotations.





This then gives you access to Supplier's quotations by clicking on the links.

