eQuotes are used to obtain written quotes for goods and services that are not on a state contract and the total cost is between $5,000 and $9,999.99. An eQuote is keyed only once and can be sent to multiple suppliers.

From the home screen, go to create an eRequisition.

Key in the title of the requisition and then click “Add from Catalog”.

...
In the search field, key in “punchout” and click search.

Select eQuote Punchout. It is the next to last selection on the right side of the list.
1. Starting at the top of the screen, you will see the date will default to the date initiated.
2. The eQuote title will default into the field.
3. Note your requisition number has already been assigned.
4. Select the date that the eQuote will be due back for your review.
5. Be sure that the ship to address is correct. If the address needs to be changed, you will do this once the eQuote has been awarded and the requisition has been sent to Datatel.
6. FOB should remain “Destination”.
7. Key in the date that the items should be delivered to you. If this is a rush, check the 2 business days.

**Items Section**

1. Key in the number of line items that will need to be quoted. Click “Display”. If you determine that you need additional lines, click “Add Item” and a new line item will appear. If you need fewer lines than are displayed, the system will remove those lines that have no data when you move forward with the eQuote.
2. Key in the supplier SKU if available. Key in a detailed description. Key in the quantity needed and the correct unit of measure. Be sure that the “Good” box is checked for goods and the “Service” box is checked if the eQuote is for a service. If this is a service, the quantity needed will be 1 and the unit of measure will be dollar.

**Specifications Section**

1. Additional Information – Key in “All shipping and handling is to be included in the line items above. Do NOT list as a separate line item.”
2. Substitute Products – This field will automatically default to yes.
3. Attachments – If additional specifications are needed that were not included in the item description field, you may add an attachment here with the additional information.
4. Terms and Conditions – By providing an eQuote, the supplier is agreeing to the North Carolina terms and conditions.
5. External Notes – Is there anything else that needs to be included with the request for quote? These notes will appear to the suppliers that receive the eQuote request. Consider adding your contact information so that the suppliers have a contact to send questions to in the event something is not clear.
6. Internal Notes – Use this section for any information that needs to be included internally, such as the ship to address.

Bottom of Screen
1. Select “Save as Draft” if you need to stop work on the eQuote. You can come back to this same requisition at any time and begin where you left off.
2. Click “Continue” to move forward and complete the eQuote.

Search for Suppliers
Search for Specific Suppliers
1. Key the supplier’s name in the field and click search. Once you have found the supplier, click on the box to the left of the supplier name. Click “Add to eQuote”.
2. If you do not know of a supplier, key in a word related to what you are quoting. For example, if purchasing software, key in “software” and you will get a list of suppliers that have the word “software” in the company name. Select suppliers from the list provided.

Search for a List of Suppliers
1. Criteria must be selected from all three selection categories.
   a. In Category Selection, click the drop down arrow to find a list of items to choose the correct category.
   b. Click the drop down arrow for the second level category to further narrow your search.
   c. The third level category will narrow the category even further.
2. If this is a rush eQuote, check the rush response to see only suppliers that signed up to do rush eQuotes.
3. Click “Search”. Then click on the left beside the supplier names that are to be included and click add to eQuote.
4. The names of all suppliers added to the eQuote will show at the bottom of the screen. Suppliers can be deleted or added to the selected list.
5. Click “Save as a Draft” and complete the eQuote later or click “Continue” to move forward.

Review and Submit
Review the eQuote. Make any needed changes by clicking on edit at the bottom right of the screen. Click “Submit” once all information is correct. The eQuote will be sent to all selected suppliers.

REVIEW STATUS OF EQUOTE

The status of the eQuote can be viewed at any time. Click “Search”, “eRequisition”, key in the requisition number and click search. Click on the requisition number. The next screen will provide an update of activity related to the eQuote. If a supplier has already submitted a quote, it will be seen here. After the due date has passed, the eQuote will be retrieved using this same method. All quotes received will be seen.

EVALUATION OF EQUOTES
Click “View” beside the supplier’s name to see the complete eQuote for a particular supplier. Click the box to the left of all eQuotes received and “Tabulate Selected” for a tabulation of all eQuotes.

1. Review any additional information or attachments that may have been included with the eQuote.
2. Review the shipping included/not included line. All eQuotes should include any shipping charges.
3. For eQuotes that state shipping was NOT included, email the supplier for clarification to determine if shipping charges were included.
   a. If the low quote, including shipping charges, is recommended for award but the shipping charges are not included in the eQuote, include an internal note on the requisition for your buyer. Once the requisition is submitted into Datatel, you will need to add a line item for shipping charges.

RECOMMENDATION OF AWARD

1. If the quote was for multiple items, determine if it is in CPCC’s best interest to cherrypick the items and recommend award to multiple suppliers or if the quote recommendation will be to award in total.
2. If cherrypicking, click by line item and by supplier on the items to be recommended. Click “Add to Requisition”.
3. If recommending award in total, click the box beside the selected supplier and then click “Add to Requisition”. You will be returned to the original requisition.
4. Edit the requisition to update commodity codes for each line item.
5. Verify that all information is correct before submitting the final requisition.