



easySourcing™ Quote Supplier Reference Guide



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easySourcing™ Quote Process

This document provides a condensed overview of the supplier quote response process. It will demonstrate with short text descriptions supported by screen shots for each step explained.

Creation of Quote Response

Each registered supplier asked to participate will have received an automatic email message that explains the invitation to the quote. The supplier will log with a username (email) and password to complete the response.

vendor response

1 view 2 create 3 submit 4 awards 5 profile 6 subscription 7 reports

Create or Modify a Response for the Selected Bid, Quote Request, or Project Request

Instructions: To begin responding to an event or make modifications to a response in progress, select the link in the Response Action column next to the event of interest. For additional assistance select the Help link above.

Demo eSchoolMall Official Time

Response Action	Bid / Request ID	Purchasing Entity	Description	Type	Time Remaining	Response Due By	Response ID	Owner	Lot Status	Response Status	Event Status
8 Create	9 28	Adrianne Cianfrani School District	Test example (Reference Guide)	Quote	2h 36m	6/29/2015 2:00 PM	New		10 New	11 Accepting Responses	

ⓘ : Addendum exists for the Bid/Request

1. View tab: allows suppliers to view all quotes that they participated in
2. Create tab: Default tab which displays active quotes awaiting a response
3. Submit tab: contains all pending quotes not sent to the requester
4. Awards tab: submitted responses will populate under this tab, awaiting the buyer awarding process results
5. Profile tab: allows suppliers to edit information provided when they registered (Contact, NIGP Codes and Diversity Class)
6. Subscription tab: allows suppliers to purchase an annual subscription
7. Reports tab: choice of six reports indicative of quote actions for the supplier
8. Response Action: directs suppliers to the appropriate pages to respond to a quote
9. Bid/Request ID: Quote identification number, used to reference the quote to buyers
10. Response Status: Indicates the progression of the supplier's response
 - a. New: a response has not be created
 - b. In Progress: response has been created but not submitted
 - c. Submitted: the response has been sent to the buyer
 - d. Past Due: the response is late, but can still be submitted
 - e. Missed: response was not submitted before the Quote Due By date
11. Event Status: Indicates the progression of the buyer's quote process
 - a. Accepting Responses: Quote is open for responses
 - b. Awaiting Review: Quote is closed but is still sealed
 - c. Under Review: Buyer has opened the responses and is evaluating the response
 - d. Awarded: Awards have been published to suppliers

When the supplier opens the quote for the first time, they will be prompted to Accept or Decline the Terms and Conditions of the quote. If they select Decline, the quote cannot be acted upon.

vendor response

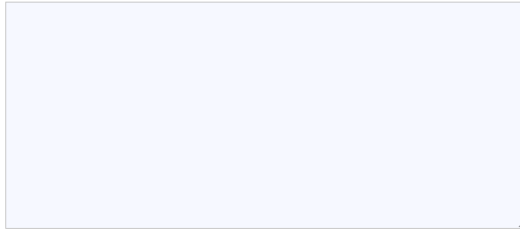
view | create | submit | awards | profile | subscription | reports

Create Response - Accept Terms

Instructions: Review the following Terms & Conditions. Upon completing your review either click the Accept button to accept the Terms & Conditions or click the Decline button to return to the previous screen. Note - if you Decline the Terms & Conditions you can return at a later date and Accept them. The Bid/Request will display once the Terms & Conditions are Accepted.

Purchasing Entity:	Adrienne Cianfrini School District Test	Response ID:	8451
Request ID:	28	Responses Due By:	6/29/2015 2:00 PM
Description:	Test example (Reference Guide)	Time Remaining:	2 hours 36 minutes
Attachments:		Printable Terms:	

Quote Request Terms and Conditions:



Click "Accept" below to accept the Terms and Conditions listed above:

Accept Decline

If the supplier agrees to the Terms and Conditions, the supplier can respond to the quote.

vendor response

view | create | submit | awards | profile | subscription | reports

Event Detail

Adrienne Cianfrini School District Test

28
Test example (Reference Guide)

Time Remaining: 2 hours 36 minutes

Event Information	
ID:	28
Description:	Test example (Reference Guide)
Status:	Accepting Responses
Due By Date:	06/29/2015 2:00 PM
Effective Date Range:	
Type:	Quote
Checklist Items:	None specified.
Attachment Files:	None
Terms & Conditions:	

Links:
Back
To Items
Legend
Official Time
Status Detail
Help
Response Submit New

3

Response Information	Save
Response Number: 8451	
1 Status: In Progress	
Owner: Cianfrini, Adrienne	
2	
	Response Terms: <input type="text"/>
	Response Payment Terms: <input type="text"/>
	Attachment Files: Attach File <input type="text"/>

Please note the **Time Remaining** is listed above the Event Information.

1. Status: displays the progress of the response
2. Supplier's Terms and Conditions: fields opportunity for supplier to include their own Terms and Conditions (i.e. discount for quick pay)
3. Response Submit: link to the Submit tab.

Suppliers should save their Response Terms, Response Payment Terms and Attached files.

Select the Create Response Action to input the response for each line item.

Response Number: 8451
 Status: [In Progress](#)
 Owner: [Carlson, Adams](#)

Response Terms:

Response Payment Terms:

Attachment Files: [Attach File](#)

[Save](#)

Items **(All Items)** Without Responses With Responses

Showing 1 to 1 of 1 Results

Line ^	Description	Item Number	Manufacturer	Manufacturer Part Number	Quantity	Response Action
1	item 1	1234567890			3	Create

vendor response

view | [create](#) | [submit](#) | [awards](#) | [profile](#) | [subscription](#) | [reports](#)

Response Information [Save](#)

Response Number: 8451
 Status: [In Progress](#)
 Owner: [Carlson, Adams](#)

Create Response For Line 1 [Save & Close](#) [Save](#) [Close](#)

Description: item 1

* Manufacturer:

Mfg Part Number:

* Product Number:

Quantity:

* Price:

Total Price: 0.00

Response Item Notes:

Response Item Payment Terms:

Attachment Files: [Attach File](#)
 Samples

[Save & Close](#) [Save](#) [Close](#)

* = Required Entry

Items **(All Items)** Without Responses With Responses

Showing 1 to 1 of 1 Results

Line ^	Description	Item Number	Manufacturer	Manufacturer Part Number	Quantity	Response Action
1	item 1	1234567890			3	Create

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Attachments, Terms & Conditions and Notes can be made at the header-level (previous screen) or line-level. Once the information has been entered, the supplier selects save and close.

Under Response Action, Create indicates first opportunity to respond to a line item. Modify indicates a saved response available for editing.

Line #	Description	Item Number	Manufacturer	Manufacturer Part Number	Purchase Unit	Quantity	Response Action
1	Book	AA-1	Publisher	9780123654789	1 - 1 Each Book	15	Modify (1)
2	Textbook	AA-2	Publisher	9786512587624	1 - 15 Count Box	2	Create

If Create appears below Modify, the buyer has allowed multiple responses for each line item. The number in parentheses represents the saved responses.

Items (All Items) Without Responses With Responses							
Line #	Description	Item Number	Manufacturer	Manufacturer Part Number	Quantity	Response Action	
1	item 1	1234567890			3	Modify (1)	Create

Submitting a Quote Response

Suppliers can start the submission process from two locations:

1. Submit Response Link

Links:

- [Back](#)
- [To Items](#)
- [Legend](#)
- [Official Time](#)
- [Status Detail](#)
- [Help](#)
- [Response Submit](#) **New**

2. Submit Tab :Select the quote to submit by clicking on the Response ID

vendor response

view | create | **submit** | awards | profile | subscription | reports

Select a Bid, Quote Request, or Project Request to Submit

Instructions: To Submit a response, select the Response ID of interest and then follow the instructions on the next screen to complete the process.

Response ID	Type	Purchasing Entity	Bid / Request ID	Description	Response Due By	Time Remaining	Owner	Response Status
8451	Quote	Adrienne Cianfarini School District Test	28	Test example (Reference Guide)	6/29/2015 2:00 PM	2h 32m	Cianfarini, Adrienne	In Progress

ⓘ Addendum exists for the Bid/Request

After selecting option 1 or 2, the supplier will be directed to the screen below to assign the PO Contact from the drop-down menu.

vendor response

[view](#) | [create](#) | [submit](#) | [awards](#) | [profile](#) | [subscription](#) | [reports](#)

Submit Detail

Time Remaining: 2 hours 32 minutes

Event Information	
Purchasing Entity: #188888 - California School District Test	Attachment Files: None
ID: 28	
Description: Test example (Reference Guide)	
Status: Accepting Responses	
Due Date: 6/29/2015 2:00 PM	
Effective Date Range:	
Type: Quote	
Terms & Conditions:	

Links:
Back
View
Official Time
Help

Actions:
Submit

Response Information
Response Number: 8451
Total Response Amount: 30.00
Items Responded To: 1 of 1
Total Responses: 1
PO Contact: #188888 - California School District Test (@esmsolutions.com) ▼

[Submit](#) [Cancel](#) [View](#)

Suppliers can view the response before submitting.

Select **Submit** under the Actions menu or at the bottom of the screen.

vendor response

[view](#) | [create](#) | [submit](#) | [awards](#) | [profile](#) | [subscription](#) | [reports](#)

Submit Detail

Time Remaining: 2 hours 32 minutes

Event Information	
Purchasing Entity: #188888 - California School District Test	Attachment Files: None
ID: 28	
Description: Test example (Reference Guide)	
Status: Accepting Responses	
Due Date: 6/29/2015 2:00 PM	
Effective Date Range:	
Type: Quote	
Terms & Conditions:	

Links:
Back
View
Official Time
Help

Actions:
Submit

Response Information
Response Number: 8451
Total Response Amount: 30.00
Items Responded To: 1 of 1
Total Responses: 1
PO Contact: #188888 - California School District Test (@esmsolutions.com) ▼

[Submit](#) [Cancel](#) [View](#)

Upon **successful** submission of the quote, the “**Congratulations**” screen will appear.

vendor response

[view](#) | [create](#) | [submit](#) | [awards](#) | [profile](#) | [subscription](#) | [reports](#)

Event Submission Confirmation

Congratulations! You have successfully submitted your response for event **28 Test example (Reference Guide)** on **6/29/2015 11:28:12 AM**. [#188888 - California School District Test](#) would like to thank you for participating in this event. Please note the response Due By Date of this event is **6/29/2015 2:00:00 PM**.

Prior to navigating away from this screen you may want to print the contents of this page for your records. You can also view your response and the status of this event from within the View submenu option. If you need additional assistance please contact ESM Solutions at support@esmsolutions.com.

[Continue](#)

Suppliers can contact the buyer to verify the submission of the response.

Monitor Supplier Response Status

The buyer is able to monitor the supplier activity by time-stamped statuses:

1. Notified of the Quote
2. Accepted or rejected the Terms and Conditions
3. Has a response in progress
4. Has submitted a response

Awards

The submitted quote will be visible under the Awards Tab. To view the awards, select the Request ID of the Quote.

vendor
response

view | create | submit | awards | profile | subscription | reports

View the Award Status of a Selected Bid, Quote Request, or Project Request

Search Criteria

Request ID: Request Description:
 Response #: Purchasing Entity:
 Event Status: All Date Range: None To
 Owner: All

Search Links

[All](#)
[Awarded](#)
[Under Review](#)
[Awaiting Review](#)
[Responses I Own](#)

Quick Links

[Legend](#)
[Demo eSchoolMall Official Time](#)

Search Results

Showing 1 to 20 of 31 Results

Request ID	Purchasing Entity	Description	Type	Due By Date v	Sealed Until	Award Date	Response Number	Response Owner	Response Status	Event Status
28	School District Test	Test example (Reference Guide)	Quote	6/29/2015 2:00 PM			8451		Submitted	Accepting Responses
32	School District Test	Reference Guide (Example)	Bid	6/27/2015 11:00 AM	6/27/2015 11:00 AM		8450		Submitted	Awaiting Review
30	School District Test	Reference Guide (Example)	Bid	6/26/2015 2:45 PM	6/26/2015 2:45 PM		8449		Submitted	Under Review
29	School District Test	Copy of Test 1 (Default settings)	Quote	6/22/2015 9:55 AM			8425		Submitted	Under Review

All suppliers who submitted a response are notified by email of the award results. The results are visible under the Awards tab. The quote will only display the supplier's own responses and not the responses of other participating suppliers.


Monitoring Buyer activity by Event Status:

1. Accepting Responses: Quote is still open and sealed
2. Awaiting Review: Quote is closed but is still sealed
3. Under Review: Buyer has opened the responses and is evaluating
4. Awarded: Quote results have been published to suppliers

vendor response

view | create | submit | awards | profile | subscription | reports

Report Request Status

Request ID	Report ID	Name	Description	Date Requested	Status	Report Output
17929	10 Award		Displays the awards for a selected Bid / Request	6/29/2015 2:48:45 PM	Request completed on 6/29/2015 2:49:15 PM.	

[Return](#) [Refresh](#)

Selecting the icon allows the report to be viewed by the user.

Sourcing Event Posting Board

Some buyers can create Sourcing Event Posting Boards, which allow them to share information about quotes that are in process to suppliers without issuing an invitation.

Note: All quotes follow the process outlined above. The Sourcing Event Posting Board is a communication tool for **viewing** the event. Suppliers still **require an invitation to participate** in the quote.

event posting

view | post

Sourcing Event Posting Board - View

Search: [Search](#)

Page Refresh (seconds): Manual | 30 | 60

1 Event ID v	2 Type	3 Purchasing Entity	4 Description	5 Posted Date	6 Published Date	7 Opening Date	8 Status
45	Bid	School District Test	Lot Reference Guide (Example)	7/29/2015 10:30 AM	7/28/2015 9:10 AM	7/28/2015 10:00 AM	Award Required
9 Attachments: Summary Event Information: Generate							
36	Bid	School District Test	Reference Guide (Example)	7/29/2015 10:04 AM			New
Attachments: test 2 : Open test sample: Open Summary Event Information: Open							

The Sourcing Event Posting Board links are specific to the buyer entity.

1. Event ID: Identification number that matches the Bid/Quote ID
2. Type: Bid, Quote, Project etc.
3. Purchasing Entity: Buyer
4. Description: matches the Description of the bid/quote
5. Posted Date: creation of posting event
6. Published Date: publishing date of the bid/quote
7. Opening Date: Open for supplier participation.
8. Status: Event status of the bid/quote

The Summary Event Information report contains the details of the quote.

Quote Request Event Summary
eSchoolMall Demo Environment

Purchasing Entity: ██████████ School District Test
Request ID: 42
Description: Reference Guide
Category: Example
Effective Start:
Effective End:

Run Date: 07/31/2015 2:17 PM
Published: 07/27/2015 9:48 AM
Quotes Due By: 07/27/2015 2:00 PM
Quotes Awarded:

Line Number	Item Description	Item Manufacturer & Part Number	Quantity Required	Sample Req'd
1	Example of Service		1	No
2	Hardware for Installation	Manufacturer: 1245	15	No
3	Paint in gallons		4	No

