

## PHLContracts Quick Reference Guide

# Creating & Editing Quotes

---

The purpose of this guide is to provide support to vendors in responding to solicitations. In PHLContracts, a solicitation is referred to as a **Bid** document.

All solicitations offered by the City of Philadelphia in PHLContracts will be managed online, including responses to Bids by vendors. A vendor must be fully registered in PHLContracts to respond to a bid. If the vendor is not registered, they should register by accessing <https://www.phlcontracts.phila.gov> and selecting **Supplier Registration**. A user guide to assist vendors with registering, titled **Registering as a PHL Contracts Vendor**, may be accessed by clicking [here](#).

For fully registered vendors, log in with your Login ID and Password.

### Electronic Payments Now Available

---

Electronic payments are now available for:

- Bid Processing Fee Annual
- Bid Security Fee
- Performance Security Fee

To make an electronic payment via debit card, credit card, or e-check:

1. Go to <https://www.phila.gov/make-a-payment/#city-contracts>
2. Select the desired Procurement Payment
3. After clicking a payment type, you will be directed to a secure payment website to complete the payment

### Creating a Response to the Solicitation

---

In PHLContracts, a response to a solicitation is referred to as a **Quote**.

The first step is to find the Bid in question so that you can review what is being solicited and instructions on how to respond provided by the Buyer.

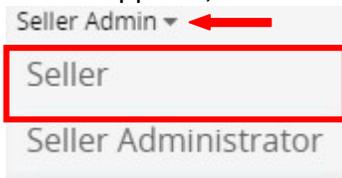
## PHLContracts Quick Reference Guide Creating & Editing Quotes

When you have logged in, ensure that if you have both the Seller and Seller Administrator roles, you have the Seller role selected. This role allows you to view and respond to Bids in PHLContracts.

- Click on the Account icon on the top right of the screen

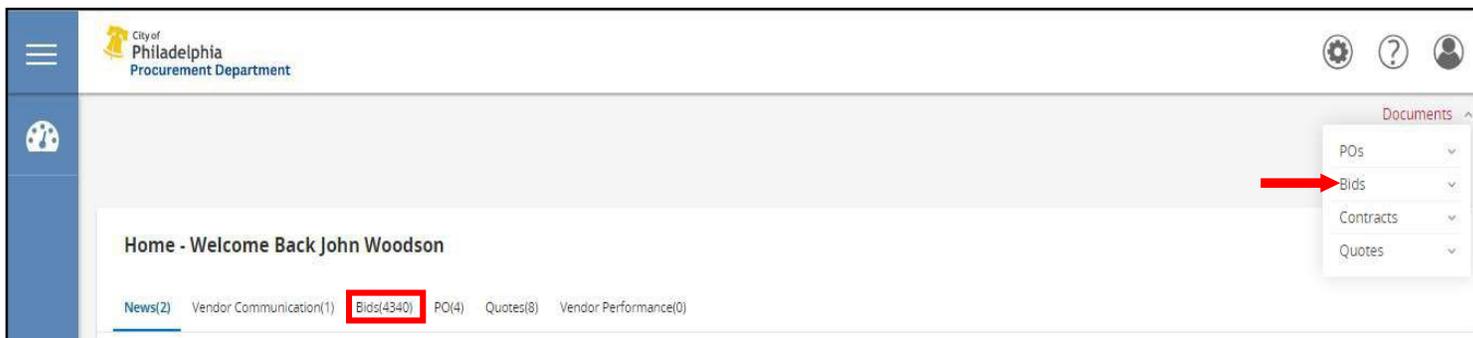


- If Seller Admin appears, click on the down triangle, then select Seller



- The screen will refresh with the Seller role

Click on the **Bids** tab on your home screen to the right of News and Vendor Communication, or search for Bids using the Documents dropdown menu near the top right of your screen.



**Open Bids** are bids still open for Quotes, and Closed Bids are bids no longer accepting Quotes from vendors.

Under **Open Bids**, only the first five bids will be displayed. Click **View More...** under the last bid displayed to view the full list.

Bid #	Organization	Alternate Id	Buyer	Description	Bid Opening Date	Bid Q & A	Create Quote /View Auction	Bid Holder
<a href="#">B2419928</a>	City of Philadelphia		Purchaser MP	WINTER GEAR FOR OUTREACH WORK (GLOVES + HATS)	12/07/2023 11:59:00 PM	<a href="#">View</a>	<a href="#">Create Quote</a>	
<a href="#">B2419925</a>	City of Philadelphia		Purchaser MP	Sound Equipment	12/18/2023 12:00:00 AM	<a href="#">View</a>	<a href="#">Create Quote</a>	
<a href="#">B2419924</a>	City of Philadelphia		Purchaser MP	Sound Equipment	12/18/2023 12:00:00 AM	<a href="#">View</a>	<a href="#">Create Quote</a>	
<a href="#">B2419923</a>	City of Philadelphia		Purchaser MP	Winter Gear for Outreach Work	12/07/2023 11:00:59 PM	<a href="#">View</a>	<a href="#">Create Quote</a>	
<a href="#">B2419921</a>	City of Philadelphia		Purchaser MP	Sound Equipment	12/18/2023 12:00:00 AM	<a href="#">View</a>	<a href="#">Create Quote</a>	
<a href="#">View More...</a>								

## PHLContracts Quick Reference Guide Creating & Editing Quotes

Click on the bid link to view the bid. If you would like to add yourself to the Bid List and be notified of any updates, amendments, and status changes for the bid, click on the **Follow** button at the bottom of the screen. On the **Acknowledge Receipt and View Solicitation** screen, click the **Yes** button. Clicking **No** will take you to the Bid Solicitation without adding you to the Bid List.

Once you are viewing an active open Bid, you can create a response by clicking the **Create Quote** button at the bottom of the screen. This will display the **New Quote** screen.

### New Quote

- [General](#)
- [Items](#)
- [Questions](#)
- [Subcontractors](#)
- [Notes](#)
- [Terms & Conditions](#)
- [Attachments](#)
- [Summary](#)
- [Back to Bid](#)

Quote #:		Bid #:	<b>B1903101</b>
Organization:	City of Philadelphia	Description*:	Wireless Projectors <span>×</span>
Status:	In progress	Discount Percent:	0.0 %
Delivery Days:	<input type="text" value="0"/>	Alternate Bid:	<input type="checkbox"/>
Is "No Bid":	<input type="checkbox"/>	Freight Terms:	<input type="text" value="v"/>
Shipping Terms:	<input type="text" value="v"/>	Payment Terms:	<input type="text" value="v"/>
Ship Via Terms:	<input type="text" value="v"/>		
Promised Date: (MM/DD/YYYY)	<input type="text" value=""/> 		
Info Contact:	<input type="text" value=""/> <input type="text" value=""/>		
Comments:	<input type="text" value=""/> <input type="text" value=""/>		
Date Last Updated:		User Last Updated:	

Copyright © 2019 Periscope Holdings, Inc. - All Rights Reserved.

## PHLContracts Quick Reference Guide Creating & Editing Quotes

---

Below is a description of the fields provided on the **General** tab of the quote. Please note that the \* denotes a required field.

- **Quote Number**
  - Will be auto assigned upon completion of the **General** tab
- **Description**
  - Same as the Bid description. This can be edited to provide a description of your response, if appropriate.
- **Delivery Days**
  - If applicable, number of days for delivery (if response is for an ongoing, orderable set of goods or services)
- **Discount Percent**
  - If entered, will apply the discount to all items on quote. If discount is item by item, please use the **Items** tab
- **Is “No Bid”**
  - Selecting no bid will notify the City of Philadelphia that you do not wish to submit a response
- **Alternate Bid**
  - *This functionality is not being used by the City of Philadelphia*
- **Shipping Terms**
  - *This functionality is not being used by the City of Philadelphia*
- **Freight Terms**
  - *This functionality is not being used by the City of Philadelphia*
- **Ship Via Terms**
  - *This functionality is not being used by the City of Philadelphia*
- **Payment Terms**
  - *This functionality is not being used by the City of Philadelphia*
- **Promised Date**
  - If applicable, promised date for delivery of the requested goods or service (for one-time delivery)
- **Info Contact**
  - Enter Vendor primary contact information for the Quote
- **Comments**
  - Enter any comments for the Quote. This will be displayed to the buyer and be considered part of your response

Once you have entered the necessary fields, click **Save & Continue**. The screen will refresh, and PHLContracts will automatically generate a Quote number. The following required questions will be displayed on the page.

- **Is your company certified as a Local Business Entity by the City of Philadelphia Procurement Department?**
  - Select Yes if you have been certified; otherwise, select No
- **For each item listed on the Items tab, indicate a cost, or select “No Charge,” as instructed by section 2 or section 5 of the bid document. Select “No Bid” if vendor is not supplying a quote for the specific item.**
  - Select Acknowledged

Click **Save & Continue** to save your answer to these questions.

# PHLContracts Quick Reference Guide

## Creating & Editing Quotes

### Error Messaging

While working on the Quote, you may see red or yellow error messages. Red error messages indicate something that MUST be addressed or corrected before submitting the Quote. A yellow warning indicates a component of the Quote that may be non-standard (e.g., not fulfilling subcontractor goals/requirements fully); however, the Quote can be submitted even if the yellow warnings are displayed.

**After reviewing and completing every tab, the warning messages will disappear, and you will be able to submit your quote.**

### Items Tab

Click on the Items the **Items** tab. This is where you enter pricing information for the items requested. Please read any attached instructions on the Bid or instructions appearing on the **Items** tab of the Bid carefully to ensure that your response is entered as requested by the City of Philadelphia.

### Quote Q0010021 - City of Philadelphia Test Vendor

General **Items** Questions Subcontractors Notes Terms & Conditions Attachments Summary [Back to Bid](#)

**General** Notes

Sort by Column: Print Sequence  Sort Descending

Item #	Print Sequence	Questions Exist	Description	Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge	See Quote Attachment(s)
1	1.0	No	Wireless Projector Reference: EPSON V11H722120 PowerLite 1284 Projector	1.0	EA	0.00	0.0	<input type="button" value="v"/>	0.00	\$0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Alternate Description

Quote Response Total \$0.00

**i** Discount only quotes indicate discount amount off of list catalog price.

## PHLContracts Quick Reference Guide

# Creating & Editing Quotes

---

The following fields allow you to enter information:

- **Unit Cost**
  - Enter the unit cost per item. PHLContracts will automatically multiply the unit cost by the quantity (if applicable)
- **Discount Percent**
  - Enter the discount for the specific item, if applicable. PHLContracts will automatically calculate the net item price based on the unit cost and discount. For a markup, enter a negative number.
- **Tax Rate**
  - Enter the tax rate, if applicable
- **Freight**
  - Enter freight, if applicable
- **No Bid**
  - If checked, the vendor is not supplying a quote for this specific item
- **No Charge**
  - If checked, the item is considered to be included, provided that the vendor is awarded the PO/Contract, unless stated in the instructions for the Bid to which you are responding
- **Alternate Description**
  - An alternate description can be provided, either to supplement the description provided in the City's solicitation or to replace the City's description

Once completed, click **Save & Continue**

# PHLContracts Quick Reference Guide

## Creating & Editing Quotes

### Questions Tab

Click on the **Questions** tab. This allows you to respond to questions posted on the Bid. Please note that if responses are required, you must respond to them in order to submit the Quote. Unanswered questions that are required will generate red error messages. Once completed, click **Save & Continue**

### Quote Q0010023 - City of Philadelphia Test Vendor

[General](#) [Items](#) **[Questions](#)** [Subcontractors](#) [Notes](#) [Terms & Conditions](#) [Attachments](#) [Summary](#) [Back to Bid](#)

Question #	Required	Question	Response
1	Yes	Per paragraph 2.2, bidder shall provide telephone number, fax number, and email address of contact for orders and inquiry:	<input type="text"/>
2	Yes	Per paragraph 2.3.3, bidder shall provide contact name and phone number:	<input type="text"/>
3	Yes	Per paragraph 2.6, bidder shall provide address of pickup location:	<input type="text"/>
4	Yes	Per paragraphs 1.9a & 1.9c, did you submit required attachments to the Attachments Tab in PHL Contracts?	<input type="radio"/> Yes <input type="radio"/> No
5	Yes	Do you acknowledge any and/or all Amendments issued for bid B1801997 and understand that the amendment(s) is (are) now part of the proposal?	<input type="radio"/> Yes <input type="radio"/> No

# PHLContracts Quick Reference Guide Creating & Editing Quotes

## Subcontractor Tab

When the Bid is configured for Subcontractor Participation, you can view participation requirements and enter subcontractors and related participation data on the **Subcontractors** tab.

### Quote Q0010024 - City of Philadelphia Test Vendor

General Items Questions **Subcontractors** Notes Terms & Conditions Attachments Summary [Back to Bid](#)

Participation information: MBE Range 15% - 17% and WBE Range 10% - 12%

Subcontractors must be certified in at least 1 bid item NIGP Code: No

Subcontractors must acknowledge inclusion: No

Hours from bid closing for subcontractors to acknowledge inclusion: 0.00

Goal Type	Mandatory	Certification Required	Target %	Your %
Minority Business Enterprise (MBE)	Yes	No	15.0%	0.00%
Women Business Enterprise (WBE)	Yes	No	10.0%	0.00%

**i** Enter subcontractor participation, and select vendor category participation type and amount. Note that this solicitation has targeted goals as listed below. If the vendor is a general subcontractor, and not part of the participation goal, select none for the goal type. Also note that if the vendor certified flag is yes, the subcontractor must be certified in order to be used. To list a vendor for more than one goal type, enter the vendor selected goal type for each.

**Quote Total: \$1,863,675.00**

Please click lookup and add vendor button to add subcontractor item.

[Save & Continue](#) [Save & Exit](#) [Lookup & Add Vendors](#)

Once you have accessed the **Subcontractors** tab, navigate to the bottom of the screen to add your subcontractors. Click on the “Lookup & Add Vendors” button. A pop-up window will appear that allows you to search for registered vendors (i.e., subcontractors) and add them to your Quote.

## PHLContracts Quick Reference Guide Creating & Editing Quotes

Lookup & Add Reference Vendors - Bid Q0010024

**Vendor Lookup**

Search Using: ALL of the criteria

Search Fields:

Vendor ID	<input type="text"/>	Vendor Name	<input type="text"/>
Vendor Tax ID	<input type="text"/>	Show <input type="checkbox"/> Vendor Legal Name	<input type="text"/>
Vendor Keyword	<input type="text"/>	Alternate ID	<input type="text"/>
Integration ID	<input type="text"/>	County	<input type="text"/>
ZIP Code	<input type="text"/>		
State	<input type="text" value="v"/>		
<input type="checkbox"/> Emergency Suppliers <input type="checkbox"/> Reference Vendor			
NIGP Class	<input type="text" value="v"/>		
NIGP Class Item	<input type="text" value="v"/>		

You may search and locate your subcontractors by entering their vendor name (or other identifying data), or you may search across the vendor database for any Minority-owner Business Enterprise (MBE), Women-owned Business Enterprise (WBE), Minority Women-owned Business Enterprise (MWBE), or Disabled-owned Business Enterprise (DSBE).

Note: a subcontractor must be registered as a vendor in PHLContracts in order for you to add them to your Quote.

Once you have located the subcontractor, click the “Select” box next to the vendor name, scroll to the bottom of the pop-up screen, and click **Save & Exit**.

After a subcontractor has been added to your Quote, you should select the goal type that is being fulfilled by the subcontractor (MBE, WBE, etc.) and the estimated dollars that will be allocated to the subcontractor under the contract.

## PHLContracts Quick Reference Guide Creating & Editing Quotes

**Quote Total: \$1,863,675.00**

Delete All	Vendor ID	Vendor Name	Goal Type	Estimated Percentage	Estimated Dollars
<input type="checkbox"/>	V00005330	ABC Print Supply	Minority Business Enterprise (MBE) <input type="button" value="v"/>	15.00%	279551.25

## PHLContracts Quick Reference Guide Creating & Editing Quotes

Once you have completed the entry of this information, click **Save & Continue**. PHLContracts will calculate the estimated percentage associated with the subcontractors' participation based on the estimated dollars entered and the total value of your Quote.

You may continue to add subcontractors to fulfill all of the requirements associated with the Bid.

### Notes Tab

The **Notes** tab allows you to record internal comments, reminders, etc., that other Sellers may view in your vendor organization. For example, if multiple Sellers are working on a response, the **Notes** tab can be used to provide information on changes from one user to another user within your organization. **Please note: the Buyer issuing the solicitation will NOT see any notes when evaluating the responses.**

The screenshot shows the 'Notes' tab in the PHLContracts system. At the top, there is a navigation bar with tabs for 'General', 'Items', 'Questions', 'Subcontractors', 'Notes' (which is active), 'Terms & Conditions', 'Attachments', 'Summary', and 'Back to Bid'. Below the navigation bar is a teal information box with a blue 'i' icon and the text: 'The quote notes tab is for vendor users to enter useful information about the quote. Only authorized users who have access to this profile can view the information added to this tab. This information is not viewable by the agency.' Below the information box is a table with columns for 'Delete All', 'Note Date', 'User', and 'Note'. Under 'Delete All' is a checkbox. The 'Note' column contains a large text input area with a checkmark icon in the bottom right corner. At the bottom of the form are two buttons: 'Save & Continue' and 'Reset'.

## PHLContracts Quick Reference Guide Creating & Editing Quotes

### Terms & Conditions Tab

On the **Terms & Conditions** tab, the vendor accepts the terms and conditions of the Bid (or not). Action on this tab is required in order for the Quote to be submitted. Also, all attachments associated with Bid are shown on this tab (generally, terms and conditions will be the first or second attachment) and should be downloaded for your review and use.

General Items Questions Subcontractors Notes **Terms & Conditions** Attachments Summary [Back to Bid](#)

The following list constitutes all the attachments for the bid which may include supplemental terms and conditions.

File Name	Description	File Size
 <a href="#">Terms and Conditions</a> <a href="#">(view details)</a>		12,743 bytes
 <a href="#">Seller's Checklist</a> <a href="#">(view details)</a>		12,750 bytes

Do you accept the terms & conditions of the bid?

Yes  Yes with exceptions  No

Any individual using Company's account on PHLContracts to submit a quote is authorized by the Company to do so, and the Company shall be bound by any quote submitted through its accounts on PHLContracts. The Company shall also be bound to the terms & conditions of the bid. Depending on the terms and conditions included in this quote, any exceptions to the terms & conditions may result in your quote not being accepted. Please review the attached terms and conditions in detail.

For questions, contact information can be found on the General or Summary tabs.

If the Terms and Conditions are accepted, select **Yes**, and click **Save & Continue**.

If the vendor selects **Yes with Exceptions** or **No**, the field below becomes required and the vendor must state the reasons for not accepting the Terms & Conditions. The Seller should be mindful that some Bids do not allow exceptions to Terms and Conditions. Be sure to review the **Terms and Conditions** and **Instructions to Sellers** attachments for each Bid to which the Seller responds.

# PHLContracts Quick Reference Guide

## Creating & Editing Quotes

### Attachments Tab

The **Attachments** tab allows you to add any necessary documentation associated with your Quote. Attachments may include product specifications, completed pricing spreadsheets, standard price sheets, or other documents that need to be conveyed to the Buyer.

To add an attachment, click **Add File**.

The screenshot shows the 'Attachments' tab selected in a navigation menu. The menu includes 'General', 'Items', 'Questions', 'Subcontractors', 'Notes', 'Terms & Conditions', 'Attachments', 'Summary', and 'Back to Bid'. Below the menu, there are three sections: 'Files', 'Forms', and 'Required Attachments'. Each section has an information icon and a message: 'Click Add File to add file attachments.', 'Click Add Form to add form attachments.', and 'No required attachments' respectively. At the bottom right, there are three buttons: 'Save & Continue', 'Add File' (highlighted with a red box), and 'Add Form'.

## PHLContracts Quick Reference Guide Creating & Editing Quotes

Click the **Choose File** button to search for the file to upload from your computer. Once chosen, the vendor can edit the file's name and give it a description. If you are adding multiple files, click the **Save & Add New** button to add additional documents. Once completed, click **Save & Exit**.

### Add File

**i** **Name** is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters, spaces, and special characters up to a maximum length of 200.

**i** Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Name\*:

Description:

File\*:  No file chosen

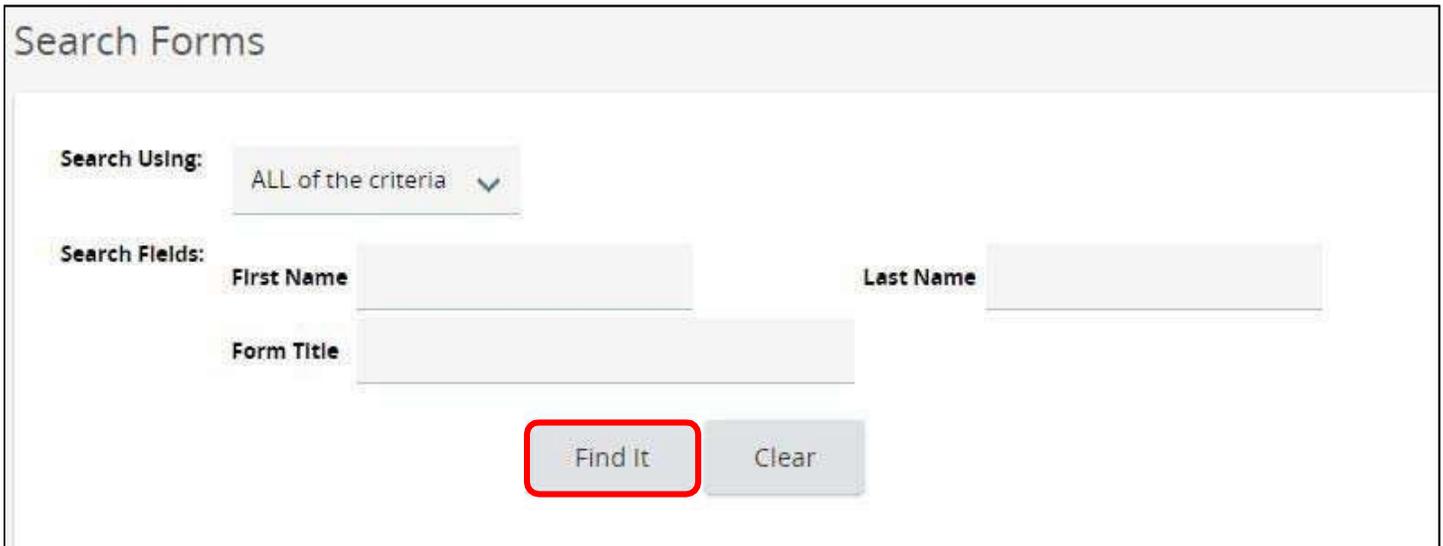
Location: V00011612

Confidential:

The **Attachments** tab will then list all the attachments on the Quote. The vendor may select an attachment and mark it Confidential. Any attachment to the Quote that contains proprietary information should be marked as Confidential.

## PHLContracts Quick Reference Guide Creating & Editing Quotes

Some Bids may also require you to complete an online **Form**. If the instructions for the Bid provide such guidance, you should click on **Add Form** on this tab. When you click on that button, a new search screen will appear. You may search for the form by its title or simply click the **Find It** button to view all forms available for editing.



The screenshot shows a search interface titled "Search Forms". It includes a "Search Using:" dropdown menu currently set to "ALL of the criteria". Below this, under "Search Fields:", there are three text input fields labeled "First Name", "Last Name", and "Form Title". At the bottom of the search area, there are two buttons: "Find It" and "Clear". The "Find It" button is highlighted with a red rectangular border.

Once you have located the correct form, you should click on the select button and then click **Edit & Attach Form**. You will now be directed to the online form for completion. The form will typically display a number of blank fields that should be completed by you.

Once you have completed the form, scroll to the bottom of the form and **Save**.

The system will indicate that the form data has been saved, and you should then click the **Exit** button.

During the process of completing a complex form, you may need to save and exit several times. Each time you would like to edit the online form, you simply click on the name of the form.

When you click the name of the form, the window that appears will show the versions of the form that exist.

To edit the form, click on the **Edit Primary Form** button. The form will open for editing. Each time you save the form, a new version will be created. The most recent version of the online form is marked as **Primary**. The Primary version is the version that will be evaluated by the Buyer.

## PHLContracts Quick Reference Guide Creating & Editing Quotes

---

### Summary Tab

---

The **Summary** tab is your opportunity to review all the information entered on the quote. If any charges need to be made, select the desired tab to go back to that screen and edit the information.

The **Print** button allows the vendor to print a copy for records.

The **Submit Quote** button will submit your Quote into the system. No changes can be made to the quote unless you withdraw the Quote.

The **Cancel Quote** button cancels the Quote (and it may not be submitted later).

## PHLContracts Quick Reference Guide Creating & Editing Quotes

### Withdrawing a Quote

Once the Quote is submitted, no changes to it may be made unless it is withdrawn first. Changes to Quotes may be made up until the Bid Opening Date/Time (after that all submitted Quotes are locked). If changes need to be made to a submitted Quote, click on the **Withdraw Quote** button on the Summary tab. Then choose the **Reopen Quote** button at the bottom of the **Summary** tab if you would like to modify and resubmit the response. The Quote will be fully open to make changes.

Please note that the Quote must again be submitted before the Bid Opening Date/Time or the Quote will not be accepted.

### Amendments and Acknowledgements

If the Buyer makes an Amendment to the Bid, the vendor must acknowledge the amendment. The vendor will receive an email, and the Amendment will be shown to the Seller homepage. On the Bids tab, a new section will appear labeled as Bid Amendments Unacknowledged.

Bids / Bid Amendments (Un-Acknowledged)						
Bid #	Organization	Alternate Id	Buyer	Description	Bid Opening Date	Bid Holder
<a href="#">B2003109</a>	City of Philadelphia		Janice Manton	Medium & Heavy Duty Truck Replacement Parts	07/31/2019 10:30:00 AM	<a href="#">List</a>
<a href="#">B1903110</a>	City of Philadelphia		Sharon Whitaker	REFILL KIT FOR GARD AIRFIELD BOLT REPAIR KIT	07/31/2019 10:30:00 AM	<a href="#">List</a>
<a href="#">B1801770</a>	City of Philadelphia	6453	Naomi Greenberg	PW Bid for Pavement & Grounds Facilities - PLUM	07/31/2019 10:30:00 AM	<a href="#">List</a>

Clicking the **Bid #** will bring the vendor to the Bid Detail view. Once the vendor has read the Amendment(s), click the **Acknowledge Amendments** button. Please note that if the Amendment makes a change to the items, the vendor may wish to withdraw any Quote(s) related to the Bid and make updates based on the Amendment before resubmitting the Quote.