

PHLContracts Quick Reference Guide Creating & Editing Quotes

The purpose of this guide is to provide support to vendors in responding to a solicitation. 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. In order to respond to a Bid, a vendor must be a fully registered vendor in PHLContracts. If the vendor is not registered, they should register by accessing <https://www.phlcontracts.phila.gov> and selecting **Register**. A guide to assist vendors in the registration process may be accessed at http://www.phila.gov/procurement/Documents/SA_Vendor_Registration.pdf.

For vendors who are fully registered, login 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 www.phila.gov
2. Select **Pay a bill**
3. You will be redirected to the City of Philadelphia Make a Payment website
4. Scroll to the bottom of the page until you see **Other** section
5. Select the desired Procurement Payment
6. After clicking a payment type, you will be directed to a secure payment website to complete 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.

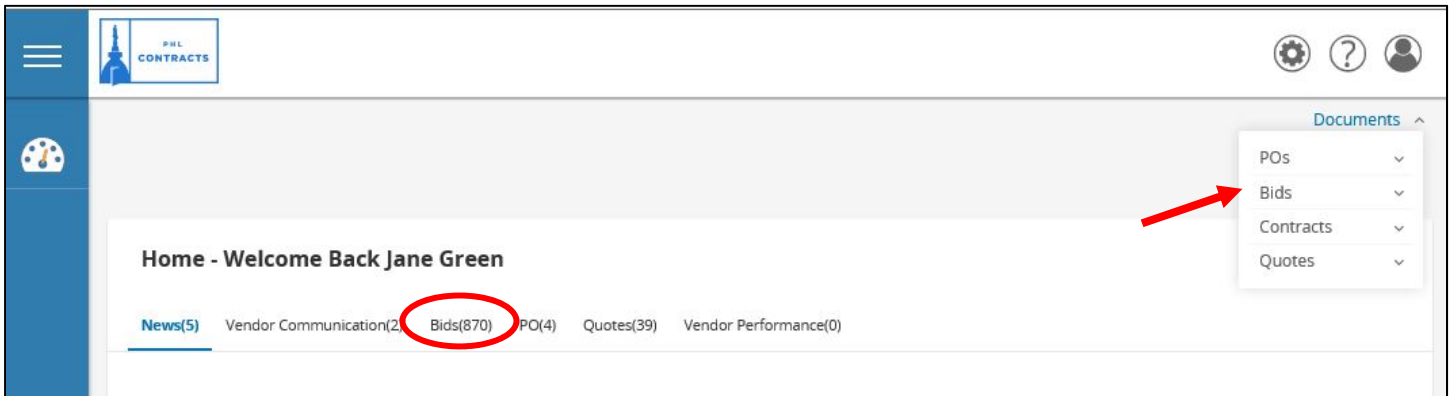
When you have logged in, make sure that if you have both the Seller and Seller Administrator roles, that you have the Seller role selected. This is the role that allows you to view and respond to Bids in PHLContracts.

- Click on the user 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 right top of your screen. **Open Bids** are bids that are still open for Quotes, and **Closed Bids** are bids that are no longer accepting Quotes from vendors.

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Once you are viewing an active open Bid, you can create a response by clicking the **Create Quote** button on 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 #:	B1903101
Organization:	City of Philadelphia	Description*:	Wireless Projectors <input type="text"/>
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"/>
Shipping Terms:	<input type="text"/>	Payment Terms:	<input type="text"/>
Ship Via Terms:	<input type="text"/>		
Promised Date: (MM/DD/YYYY)	<input type="text"/>		
Info Contact:	<input type="text"/>		
Comments:	<input type="text"/>		
Date Last Updated:		User Last Updated:	

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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 in any comments for the Quote. This will display to the buyer and be considered part of your response

Once you have entered in the necessary fields, click **Save & Continue**. The screen will refresh and a Quote number will be automatically generated by PHLContracts. The following required question will display 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

Click **Save & Continue** to save your answer to this question.

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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 display.

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

Items Tab

The **Items** tab 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		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.

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The following fields allow you to enter in information:

- **Unit Cost**
 - Enter in the unit cost per item. PHLContracts will automatically multiply the unit cost by the quantity (if applicable)
- **Discount Percent**
 - Enter in 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**

Questions Tab

The questions tab allows you to respond to questions posted on the Bid. Please note that if responses to questions are required, you must respond to the questions in order to allow the Quote to be submitted. Unanswered questions that are required will generate red error messages.

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 style="width: 90%;" type="text"/>
2	Yes	Per paragraph 2.3.3, bidder shall provide contact name and phone number:	<input style="width: 90%;" type="text"/>
3	Yes	Per paragraph 2.6, bidder shall provide address of pickup location:	<input style="width: 90%;" 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

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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.

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Lookup & Add Reference Vendors - Bid Q0010024

Vendor Lookup ☰

Search Using: ALL of the criteria ▼

Find It
Clear

Search Fields:

Vendor ID	<input style="width: 95%;" type="text"/>	Vendor Name	<input style="width: 95%;" type="text"/>
Vendor Tax ID	<input style="width: 95%;" type="text"/>	<input type="checkbox"/> Show Vendor Legal Name	<input style="width: 95%;" type="text"/>
Vendor Keyword	<input style="width: 95%;" type="text"/>	Alternate ID	<input style="width: 95%;" type="text"/>
Integration ID	<input style="width: 95%;" type="text"/>		
ZIP Code	<input style="width: 95%;" type="text"/>	County	<input style="width: 95%;" type="text"/>
State	▼		
<input type="checkbox"/> Emergency Suppliers <input type="checkbox"/> Reference Vendor			
NIGP Class	▼		
NIGP Class Item	▼		

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.

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	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> Minority Business Enterprise (MBE) ▼ </div>	15.00%	279551.25

Save & Continue
Save & Exit
Lookup & Add Vendors

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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 may be viewed by other Sellers 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: General, Items, Questions, Subcontractors, **Notes** (selected), Terms & Conditions, Attachments, Summary, and [Back to Bid](#). Below the navigation bar is a light blue informational message: "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 message is a table with columns: Delete All, Note Date, User, and Note. The 'Delete All' column contains a checkbox. The 'Note' column contains a large text input area with a small 'X' icon in the bottom right corner. At the bottom of the form are two buttons: 'Save & Continue' and 'Reset'.

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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.

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.

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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 in a web application. At the top, there are navigation tabs: General, Items, Questions, Subcontractors, Notes, Terms & Conditions, Attachments (selected), Summary, and Back to Bid. Below the tabs, there are two informational messages: 'Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.' and 'Click Add File to add file attachments.' Below these messages, there are two sections: 'Files' and 'Forms'. The 'Files' section shows 'No File Attachments' and an 'Add File' button. The 'Forms' section shows 'No Form Attachments' and an 'Add Form' button.

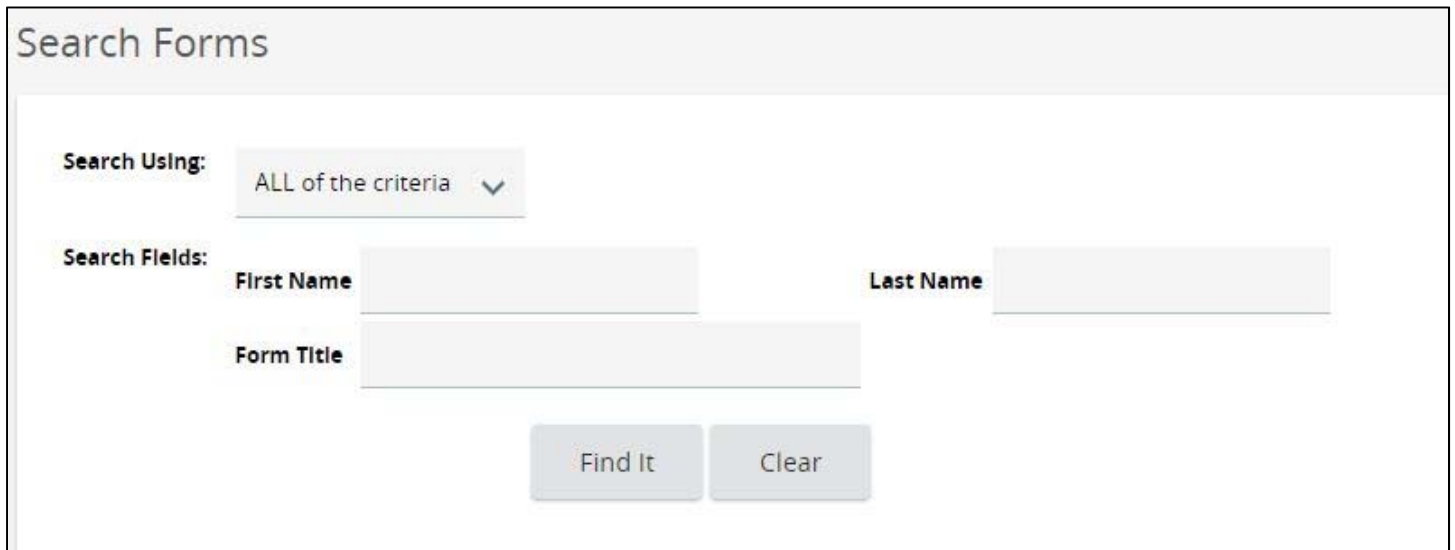
Use the **Browse** button to search for the file to upload from your computer. Once chosen, the vendor can edit the name of the file as well as give it a description. Once completed, click **Save & Exit**.

The screenshot shows the 'Add File' form. It has a title 'Add File' and two informational messages: '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.' and 'Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.' Below these messages, there are four input fields: 'Name*' (text input), 'Description:' (text input), 'File*' (text input with a 'Browse...' button), and 'Location:' (text input with the value 'V00002001'). There is also a 'Confidential:' checkbox which is currently unchecked. At the bottom, there are four buttons: 'Save & Exit', 'Save & Continue', 'Reset', and 'Cancel & Exit'.

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.

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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 are three search fields: "First Name", "Last Name", and "Form Title". At the bottom of the search area are two buttons: "Find It" and "Clear".

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.

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).

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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
B2003109	City of Philadelphia		Janice Manton	Medium & Heavy Duty Truck Replacement Parts	07/31/2019 10:30:00 AM	List
B1903110	City of Philadelphia		Sharon Whitaker	REFILL KIT FOR GARD AIRFIELD BOLT REPAIR KIT	07/31/2019 10:30:00 AM	List
B1801770	City of Philadelphia	6453	Naomi Greenberg	PW Bid for Pavement & Grounds Facilities - PLUM	07/31/2019 10:30:00 AM	List

Clicking on 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.