

## 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](http://www.phila.gov/procurement/Documents/SA_Vendor_Registration.pdf).

For vendors who are fully registered, login with your User 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:

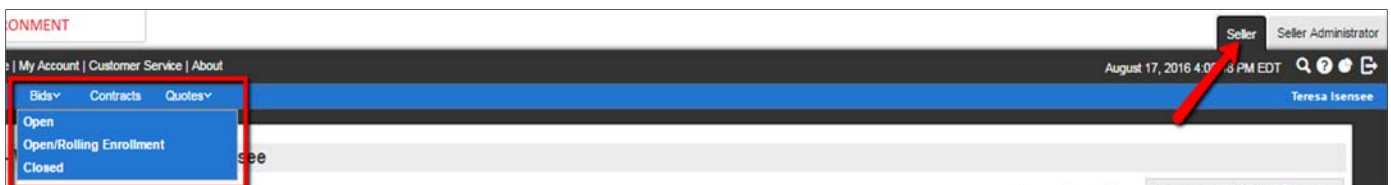
1. Go to [www.phila.gov](http://www.phila.gov)
2. Scroll to the middle of the page where you see **Pay**, then select **Procurement Payments** from the dropdown menu
3. If you are on [beta.phila.gov](http://beta.phila.gov) select **Pay a bill**
4. You will be redirected to the City of Philadelphia Payment Center website
5. Scroll to the bottom of the page until you see **Other** section
6. Select the desired Procurement Payment
7. 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 **Bids** tab on your home screen, or search for Bids using the Bid dropdown menu in the navigation bar near the 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.



## PHLContracts Quick Reference Guide Creating & Editing Quotes

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

The screenshot shows the 'New Quote' form with the following fields and values:

- Quote #: 00000030
- Organization: Texas Department of Public Safety
- Status: In progress
- Description\*: Demo
- Delivery Days: 0
- Discount Percent: 0.0%
- Is "No Bid":
- Shipping Terms: [Dropdown]
- Ship Via Terms: [Dropdown]
- Promised Date: [MM/DD/YYYY]
- Info Contact: [Text Area]
- Comments: [Text Area]
- Date Last Updated: [Field]
- User Last Updated: [Field]

A 'Save & Continue' button is located at the bottom right of the form.

The following provides 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 Date**
  - 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 Terms**
  - ***This functionality is not being used by the City of Philadelphia.*** If the vendor submits multiple Quotes, the vendor can flag a specific response as "alternate" Defaults to terms selected during vendor registration. These can be modified by selecting the appropriate terms for the dropdown menu. If "Terms" (which include Shipping, Freight and Payment terms) are requested by the City as part of a solicitation, they will be asked for on a bid by bid basis through instructions to Sellers.
- **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.

# 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 display.

### 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.

Item #	Print Sequence	Questions Exist	Description	Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge
1	1.0	No	HiAC Preventative Maintenance and Repair Service for the Department of Parks and Recreation	1.0	EA	0.00	0.0		0.00	\$0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Quote Response Total \$0.00

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

Save & Continue

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
- **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

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 00000147 - Tim's Laptops**

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

Question #	Required	Question	Response
1	No	What brand of monitor is it?	

### 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 Q00000308 - Greg's Bargain Basement**

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

Participation information:  
 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 %
WBE	Yes	No	5.0%	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: \$0.00**

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

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 Q00000308**

**Vendor Lookup** ⊟

---

Search Using: ALL of the criteria Find It    Clear

---

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"/>
ZIP Code	<input type="text"/>		County	<input type="text"/>
State	<input type="text"/>			

Emergency Suppliers     Reference Vendor

NIGP Class

NIGP Class Item

NIGP Keyword

MBE Yes

WBE Yes

MWBE Yes

DSBE Yes

Minority Vendor (self reported) Yes

Small Business Entity (SBE) Yes

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.

Delete All	Vendor ID	Vendor Name	Goal Type	Estimated Percentage	Estimated Dollars
<input type="checkbox"/>	00000053	DeJesus & Co., Inc.	None <span style="float: right;">⌵</span>	0.00%	<input style="width: 50px;" type="text" value="0.0"/>

Save & Continue   
 Save & Exit   
 Lookup & Add Vendors

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.

# PHLContracts Quick Reference Guide

## Creating & Editing Quotes

### 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.**

Quote Q00000155 - Bob Lob's Law

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

**i** 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.

Delete All	Note Date	User	Note
<input type="checkbox"/>			<div style="border: 1px solid #ccc; height: 30px;"></div>

Save & Continue Reset

### 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.

Quote Q00000155 - Bob Lob's Law

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="#">S7F01140.doc ( )</a>	Groceries	255,488 bytes
<a href="#">S0F01140.xls ( )</a>	Groceries, Pricing	53,248 bytes

Do you accept the terms & conditions of the bid?

Yes  Yes with exceptions  No

If you do not fully accept the terms & conditions, please note the exceptions below:

Save & Continue

## PHLContracts Quick Reference Guide Creating & Editing Quotes

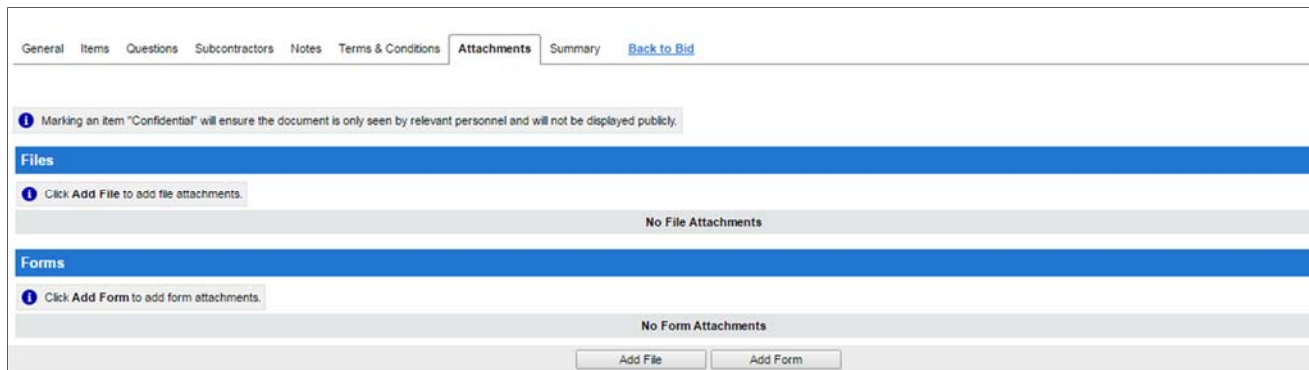
If the Terms and Conditions are accepted, select **Yes**, and click **Save & Continue**.

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.

### 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 Attachments**. The following screen will appear.

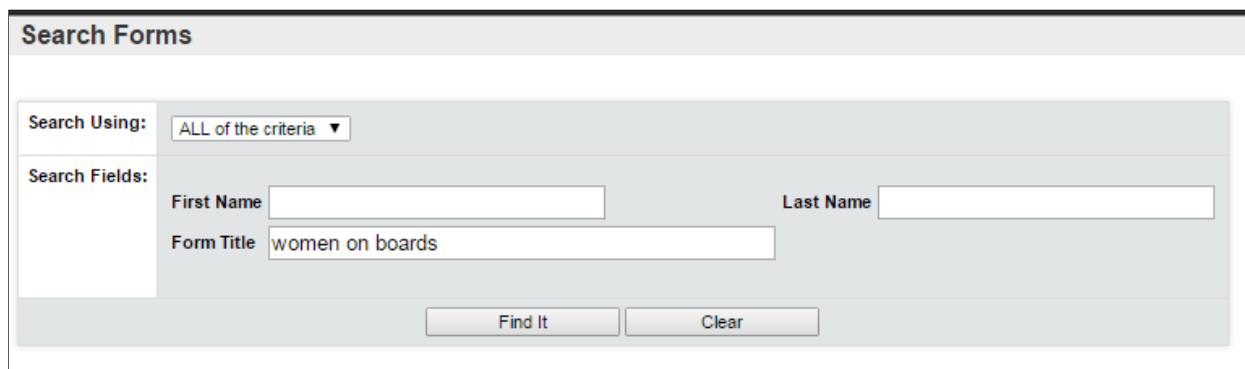


The screenshot shows the 'Attachments' tab in a web application. At the top, there are navigation tabs: General, Items, Questions, Subcontractors, Notes, Terms & Conditions, Attachments (selected), and Summary. A 'Back to Bid' link is also visible. Below the tabs, there is a message: 'Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.' The main content area is divided into two sections: 'Files' and 'Forms'. Each section has a blue header bar with a title and a sub-header. Below each section, there is a message: 'Click Add File to add file attachments.' and 'No File Attachments' for the Files section, and 'Click Add Form to add form attachments.' and 'No Form Attachments' for the Forms section. At the bottom of the page, there are two buttons: 'Add File' and 'Add Form'.

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 **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.

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 the 'Search Forms' screen. It has a title 'Search Forms' at the top. Below the title, there is a search form. The form has a 'Search Using:' dropdown menu set to 'ALL of the criteria'. Below that, there is a 'Search Fields:' section with three input fields: 'First Name', 'Last Name', and 'Form Title'. The 'Form Title' field contains the text 'women on boards'. At the bottom of the form, there are two buttons: 'Find It' and 'Clear'.

## PHLContracts Quick Reference Guide Creating & Editing Quotes

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.

### Search Forms

**Search Using:** ALL of the criteria ▼

**Search Fields:**

**First Name**  **Last Name**

**Form Title**

### Results

Select	Form Title	Form Description	First Name
<input type="radio"/>	WOB	Women on Boards	Naomi

▼ **General Company Information**

**DATE SUBMITTED**

**BID NUMBER**

CORPORATION

**DATE OF INCORPORATION**

**STATE**

**CAPITALIZATION**

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.

Name	Description	Show Vendor	Confidential	Attached By	Attached Date	Delete
<a href="#">Demolition Questionnaire</a>	Demolition Questionnaire	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Greg Higgins	10/27/2016	<input type="checkbox"/>
<a href="#">WOB</a>	Women on Boards	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Greg Higgins	10/27/2016	<input type="checkbox"/>

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



## PHLContracts Quick Reference Guide Creating & Editing Quotes

### Primary Form Details

Form Name: Demolition Questionnaire  
Current Form Version: **1**  
Last Updated: 2016-10-27 10:09:01.203  
User Last Updated: GHIGGINS

---

### Form Versions

No form versions found.

Copyright © 2016 Periscope Holdings, Inc. - All Rights Reserved.

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.

### Primary Form Details

Form Name: Demolition Questionnaire  
Current Form Version: **2**  
Last Updated: 2016-10-27 10:11:05.853  
User Last Updated: GHIGGINS

---

### Form Versions

Compare	Form Version	User	Date Created	Primary	PDF
<input type="checkbox"/>	<b>1</b>	GHIGGINS	10/27/2016	<input type="radio"/>	<a href="#">Download PDF</a>
<input type="checkbox"/>	<b>2</b>	GHIGGINS	10/27/2016	<input checked="" type="radio"/>	<a href="#">Download PDF</a>

## 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).

## 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** 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.

## PHLContracts Quick Reference Guide Creating & Editing Quotes

### 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="#">00000020</a>	Procurement Organization		Janira Barroso	Training Example - Informal Quotes	06/15/2016 10:23:00 AM	<a href="#">List</a>
<a href="#">00000023</a>	Procurement Organization		Naomi Greenberg	Demolition Services	06/15/2016 10:04:00 AM	
<a href="#">B1700043</a>	Procurement Organization		Jessica DeJesus	Prequalification for Police Training Center Access Drive	07/12/2016 01:00:00 PM	<a href="#">List</a>
<a href="#">B1700047</a>	Procurement Organization		Jessica DeJesus	Prequalification for Penrose Playground	07/15/2016 03:04:00 PM	<a href="#">List</a>

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.