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Topic I: Introduction

Learning Objectives

The following learning objectives are covered in this topic:

- Describe the purpose of this Overview
- Define related materials
- Define E-Procurement
- Define eQuote

Purpose

The purpose of this Guidebook is to assist Super Administrators with the setup and implementation of your company eQuote account.

You will learn how to manage your eQuote account including:

- Assigning the names and roles of eQuote users in your organization.
- Providing marketing information on your company for buyers to access.
- Selecting product categories and determining the types of eQuotes your company would like to receive

Contact Information

The NC E-Procurement Help Desk is available Monday through Friday, from 7:30 a.m. EST – 5:00 p.m EST. For immediate assistance, please call the Help Desk at 888-211-7440 Select Option 2.

You can also submit your questions to the Help Desk via email (ephelpdesk@its.nc.gov). A Help Desk representative will respond to your email within 2 business days.

How To Guide for eQuote users

The How to Guide for eQuotes is available on the NC E-Procurement Vendor pages. This guide will assist users in responding to eQuotes sent by State of North Carolina buyers.

To access the How to Guide for eQuotes, go to the NC E-Procurement @ Your Service page (http://www.ncgov.com/eprocurement/asp/section/ep_index.asp). Click the Vendors button then click the eQuote link. The documents for eQuote administration and use are listed on this page.

What is E-Procurement?

The word E-Procurement stands for “electronic procurement,” and it is an Internet-based purchasing system that enables electronic quote and purchase order processing and enhanced administrative functions to buyers and suppliers, resulting in operational efficiencies and potential cost savings.

E-Procurement embraces the most modern business and commercial practices from the private sector and the most current technical capabilities offered by the Internet to provide cost-saving opportunities to both suppliers and buyers.

Why E-Procurement?
The State of North Carolina is moving from a procurement environment that is paper-based to an Internet-based environment, called electronic procurement, or E-Procurement. Transacting electronically can create significant administrative cost savings for both buyers and suppliers.

How does the NC E-Procurement work?
The North Carolina E-Procurement Service enables the State to perform all procurement activities electronically; including requisitioning, submission of electronic quotes for informal solicitations, purchase order transmission and receipt of goods.

What is an eQuote?

An eQuote is an “electronic request for quote” created by a public sector buyer looking to solicit informal pricing and make a purchase. Traditionally, the request for quote process has been manually intensive on both the buyer and supplier side. eQuote automates and improves this process.

eQuote works by providing buyers with an online request for quote form to organize their line item requests, quantities, attachments, and other specifications. Buyers search through a database of eQuote suppliers, and choose to send an eQuote to the suppliers that provide the goods or services they are looking for.

Suppliers included in the eQuote are notified via email or fax and invited to respond using an online template that allows for declines, substitutions and alternates by line item.

There is no cost to your organization to respond to eQuotes. Your company is responsible for a marketing fee when a purchase order is completed. There are no up-front registration or subscription fees.

Topic II: Managing your eQuote Account

Learning Objectives

The following learning objectives are covered in this topic:

- Describe self-administration of the eQuote account
- Define roles and responsibilities

Key roles

Self-Administration
Your organization can access and configure its eQuote account at any time. You should appoint an eQuote Super Administrator to manage these duties. The eQuote Super Administrator is initially set to the eQuote contact given in vendor registration. This can be changed if necessary.

How to Identify an eQuote Super Administrator

Time Requirements
The amount of time spent administering eQuote varies based on the frequency of change within your organization.

Responsibilities

- Perform initial setup of eQuote account.
- Implement changes to eQuote account based on changes in company sales force.
- Distribute guides for all eQuote users.
- Assign backup users.

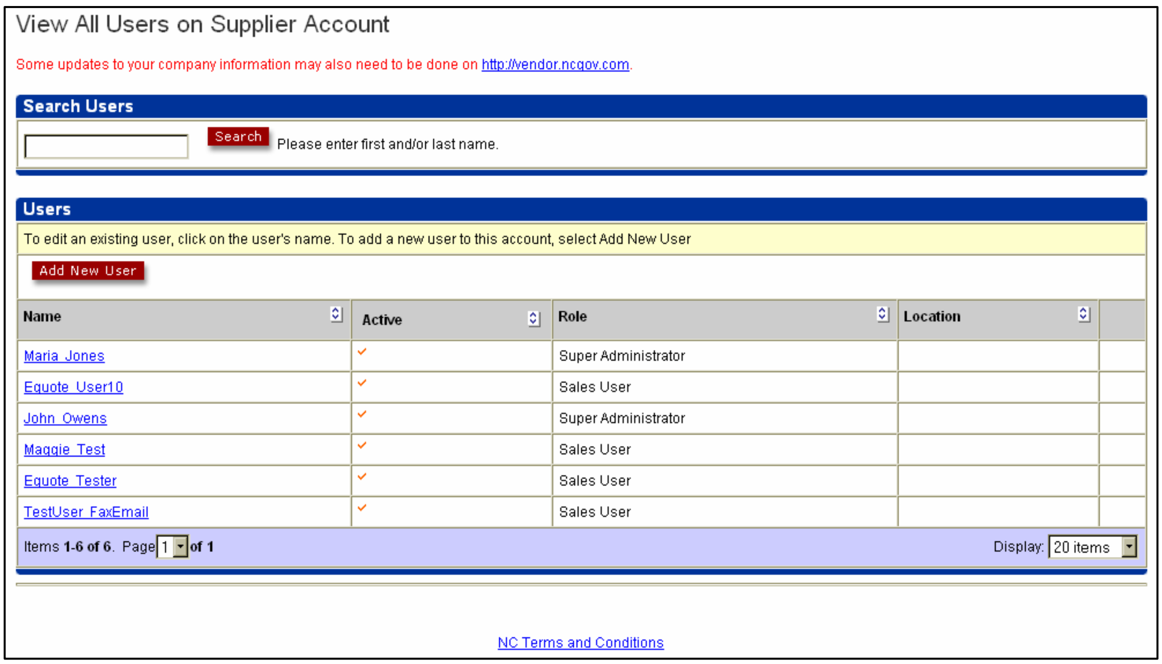
Topic III: Setting up your eQuote account – User Administration

Learning Objectives

The following learning objectives are covered in this topic:

- Identify the available user types
- Perform user administration tasks

User Administration



Use user administration to add and remove users or to change user roles.

There are two user roles that can be assigned:

1. **Sales User** – typically a sales representative who responds to eQuotes and can fulfill purchase orders. They can manage their personal preferences through “My Profile”, but do not have the ability to change the company account information or create new users.

2. **Super Administrator** – typically the eQuote Administrator or backup who manages users and marketing information. This person has access to all application features for

eQuote suppliers. The Super Administrator is able to respond to eQuotes as well as set up new users and modify vendor account information.

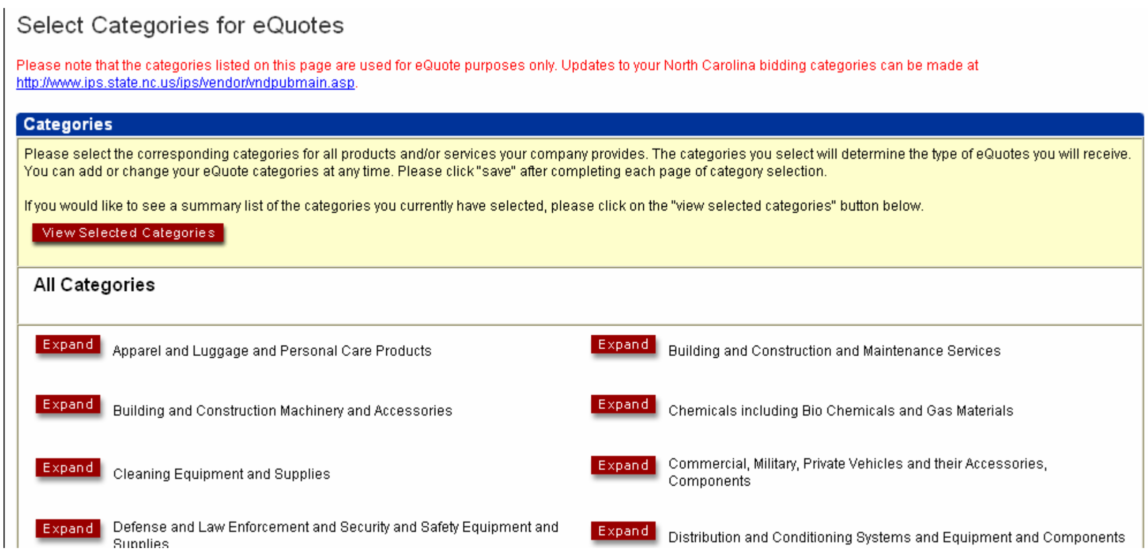
Topic IV: Setting up your eQuote account – Product Categories

Learning Objectives

The following learning objectives are covered in this topic:

- Describe the impact of selecting product categories for your account
- Select the product categories that represent your company's product mix

Product Categories



The eQuote categories represent the products or services that your company supplies. The eQuote system uses UNSPSC commodity codes (www.unspsc.com).

Product Categories Default

Your eQuote account will have any product categories pre-selected based on your selection of NIGP commodity codes from vendor registration. The product categories that are selected for your company will enable buyers to find your company based on the items that you sell and to send you eQuotes.

If you did not select any NIGP commodity codes when you registered in Vendor Registration, you will not have any product categories preselected. No product categories will be added or updated through the vendor registration account once your account has been set up in eQuote. Modification of product categories from this point forward is done directly in eQuote.

Selecting Product Categories

The categories you select will determine which eQuotes your company receives. Through categories, buyers will be able to find your organization in searches. However, they must select your organization for that eQuote in order for you to receive a quote.

You may update your categories any time you add or discontinue items.

Product Category Considerations

- The product category options may be broader than you might expect. It would be overly difficult for buyers to use eQuote if the category structure is too granular.
- If you do not find exact product categories that represent your offering, please select the categories that are closest to your product/services, and you can then use the company description area to add more definition to what your company provides.

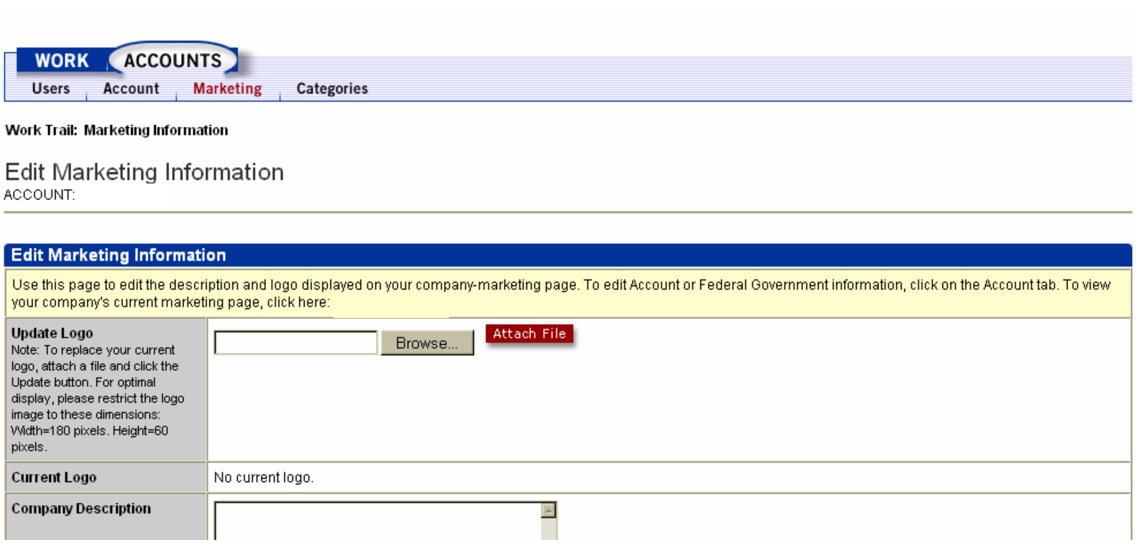
Topic V: Setting up your eQuote account – Marketing Page

Learning Objectives

The following learning objectives are covered in this topic:

- Describe the purpose of a Marketing page
- Create an effective Marketing page

Marketing Page



The marketing page feature enables your organization to provide buyers with more information about your company. This additional information may include a company description, product information, and a company logo. You may also use the marketing page as a promotional vehicle to highlight product specials or liquidation items.

Marketing Page Default

If you do nothing to your company's marketing page, it will default to the general contact information that you provided when you registered. No detailed information or company logo will appear.

Marketing Page Considerations

- Your marketing page will be helpful in encouraging buyers to initiate new business relationships or expand their existing business with your company.

- The look and feel of your page is important, so please be sure to use your company's logo or related images, and keep the messaging clean and direct.

Recommendations
Below are recommendations on what to put on your company's marketing page:

- Company logo – One .jpg or .gif, size 180 x 60 (pixels)
- Link to your website
- Your company values or mission statement
- What your company is known for (service and products)
- How long your company has been in business?
- HUB (Historically Underutilized Business) status.
- History of working with the public sector
- Market restrictions (will not work with K-12, etc.)
- References
- Ability to handle rush orders (respond to eQuote within 4 hours)
- Product and services guarantees or warranties
- Service and shipping limitations (minimum order requirements)
- Special options for service and shipping
- Customer service telephone number
- Marketing promotions (you can update this section monthly)

Updating the Marketing Page
You may update the marketing page as often as you want. It is a good idea to update your marketing page anytime you want your customers to learn something new about your company.

Topic VI: eQuote Respondents

Learning Objectives

The following learning objectives are covered in this topic:

- Distribute How To guide for eQuote reference materials to your users
- Provide tips for effective use of eQuote

eQuote Response Tips

While good eQuote information from the buyers makes it easier to provide a good eQuote response, there are many things you, as a supplier, can do to ensure that you are providing adequate information in your eQuote response.

Be Accurate and Detailed

- Be sure to offer the best possible price with shipping costs. The FOB requested by the State of North Carolina is Destination. This indicates that shipping charges are included in the total price quoted.

- Because your eQuote response may be compared with many other suppliers, you will want to provide a description that is as accurate and detailed as possible. This is especially important if you are quoting a substitute item for the buyer.

- Include any special circumstances or considerations in the notes section of your eQuote response. The buyer will be interested in any prerequisites like size, color, warranties, and new or discontinued models.

Substitute Line Items

- Buyers will appreciate any alternative products you can suggest.

- If your company does not offer the specific product that the buyer is asking for, check the eQuote to see if the buyer indicated that they would accept substitute items on this eQuote. If they will, be sure to quote them an equally acceptable product that you offer.

- Include any attachments like pictures or specifications of an alternative item.

Suggest Items to Upsell the Buyer
Add alternate or additional items to the eQuote response that may complement the requested item. Often, buyers are looking for something in particular, but may find it useful to know what items may complement the requested one.

Terms and Conditions
Standard eQuote Terms and Conditions are already provided in the eQuote through an internet link. Submitting your own terms and conditions is allowed by the State of NC and attaching such terms to the eQuote could disqualify your response.

Communicate with the Buyer

- Feel free to contact the buyer with any questions or comments about the eQuote. Their contact information is provided in the eQuote information. Buyers usually add their contact information to the external notes section of the eQuote.

- You should always decline an eQuote if you choose not to respond. An example of when you would Decline would be if you no longer carry the items quoted.
    - Buyers are appreciative of a response, even if it's simply to decline. Historically, buyers will continue to submit eQuotes to those suppliers who take the time to respond, with or without pricing.

Topic VII: Ongoing Account Maintenance

Learning Objectives

The following learning objectives are covered in this topic:

- Update company account information on an ongoing basis

Updating Account Information

Contacts
Update your contact information if:

- A new person is added or removed from the organization
- Your company changes its name
- Your main contact is no longer employed by the company
- Your address, phone number, or email address changes

Commodities/Product Categories

- Update your commodities and product categories anytime your company adds new product or service lines.

Topic VIII: Frequently Asked Questions About eQuote

Questions About Responding to eQuotes

What is the cost of participating in eQuote?
Responding to eQuotes is free of charge. For this reason, vendors are encouraged to respond with pricing whenever possible - you may submit the winning quote, and the buyer will convert your response into a purchase order. Your company is charged a marketing fee only when a purchase order is received.

When will I begin receiving eQuotes?
Your company is available to buyers through a vendor search approximately one week after accepting the Terms of Use on the Vendor Registration website.

Buyers have discretion over which suppliers they add to their eQuotes.

How will I know when my company receives an eQuote?
The assigned eQuote users in your organization will receive email and/or fax notification as soon as a buyer submits an eQuote. Each eQuote user's profile can specify which notification method they prefer, and list the email address and/or the fax number they will monitor for these notifications.

How long do I have to respond to an eQuote?
All eQuotes will include a response due date. The buyer defines the date during the eQuote creation. The date is included in the email/fax notification, so you can prioritize your work and log in to respond in time to be included in the buyer's considerations when they award a purchase order.

Where will I receive my eQuotes?
You will be notified that you have an eQuote via email or fax. Email notifications will be sent to the email address (or fax number) that you specify within your eQuote account. Email notifications will include a link that will take you directly to the eQuote login page. You can log into your secure account to view and respond to the eQuote.

Will I still have access to my customers if I participate in eQuote?
Yes. All customer contact information will be included in each eQuote request. You are encouraged to personally contact your customers. In fact, since eQuote can expedite current sales processes and lower process costs, it allows sales representatives to spend more time enhancing valuable customer relationships and generating new business.

Do I have to respond to eQuotes if I am not interested?
If you are unable to respond to an eQuote, simply submit the eQuote response form by clicking the “Decline” button and the buyer will be notified. An example of when you might decline an eQuote is when you do not carry the items requested or if the quoted item is discontinued. Buyers are always appreciative of a response, even if it’s simply to decline. Historically, buyers will continue to submit eQuotes to those suppliers who take the time to respond, with or without pricing.

Can I include my terms and conditions in an eQuote response?
No, the State of North Carolina has included terms and conditions when submitting eQuotes to the vendor. No other terms and conditions will be accepted.

Who am I competing against on eQuotes?
All suppliers who accepted the NC Terms of Use in Vendor Registration, elected to participate in eQuote, and sell the same goods/services as your company are potential competitors. Suppliers receive eQuotes based on the product categories selected. A buyer has complete control over which suppliers they want to receive their eQuote. Buyers can search suppliers by category, research supplier marketing pages and then make their supplier selections. Buyers are also able to select companies by name.

It is important to be responsive to eQuotes and to price competitively since you will not receive any information about what companies you are competing against.

How will I receive purchase orders resulting from eQuotes?

All State purchase orders are handled through the NC E-Procurement Service including those with eQuote items. You will receive a purchase order via fax or email depending on the selections made in Vendor Registration.

What if I have a question regarding a feature of eQuote?
The NC E-Procurement Help Desk is available Monday through Friday, from 7:30 a.m. EST – 5:00 p.m EST. For immediate assistance, please call the Help Desk at 888-211-7440. For eQuote questions, select Option 2. You can also submit your questions to the Help Desk via email (ephelpdesk@its.nc.gov). A Help Desk representative will respond to your email within 2 business days.