Oracle:
Submit a Quote

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[REST (Real Estate Systems Training)](#)

Document Revision History

Date	Version	Description
09/18/2015	0.1	Draft
03/21/2016	0.2	247888u – updates in support of this release
05/16/2016	0.3	Updated Quote by spreadsheet section to include xml spreadsheet
06/16/2016	0.4	Updated Quote by spreadsheet section to include CRE Quote spreadsheet
01/27/2017	1.0	Publish
09/08/2017	1.1	Added review proposal section
04/09/2018	2.0	Updated screenshots
01/11/2019	3.0	Updated with Project Dates tab
04/22/2019	3.1	Cosmetic update
05/17/2019	3.2	Updated to remove xml spreadsheet option.
02/03/2020	4.0	Added email notification screenshot & updated Project Date section to show no action for non-D&C quotes.
03/31/2020	4.1	Updated screenshots to hide sensitive information.
06/11/2021	4.2	Updated to include Materials Only/Goods type information.
07/07/2021	4.3	Made corrections to Cost Factor information.

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Overview

This document outlines how a supplier submits a bid/quote **<u>without</u>** fee options when invited to partake in a request for proposal (RFx).

If the intent is to submit a bid/quote <u>with</u> fee options, access the **Submit Quote – Fee Options** document from the [CRE Supplier Portal](#).

Notification of Intent to Participate

You will be expected to indicate if you intend to participate in the bidding process. This can be done from
- The invitation in your Worklist within the Oracle application,
- The email notification received or
- Your sourcing home page.

Oracle Worklist

On accesses your Oracle account a list of invitations or RFx requiring your attention will be presented to the right of the screen.

1. Click on the notification you'd like to respond to. Details on when the RFx will be open for bidding and when it will close will be presented. To review the full proposal, click on the **Negotiation Details** link.

Reviewing the Proposal

If the **Negotiation Details** link is selected, you may be required to accept the non-disclosure agreement displayed if you haven't already done so.

When this is done, the proposal will be presented. It consists of 3 tabs:

 - **Header** Tab – this will contain general information on the proposal including attachments and questions that may require a response.
 - **Lines** Tab – this tab will outline the service(s) required, location, quantity, UOM, cost factors, and when needed.
 - **Controls** Tab – this tab outlines important dates associated with the proposal. It also lists conditions that governor the proposal such as the possibility of early closure of the proposal, if multiple bids on the same proposal will be accepted etc. This tab is for informational purposes only.

Once you've reviewed the proposal, you can return to the notification or quote you're working on from the link at the bottom of the screen.


2. Click:
   - o **Yes** to acknowledge your intend to participate in the RFx OR,
   - o **No** if you do not intend to participate in the RFx.

3. Access the application to view the RFx details and submit your quote. See Create Quote for steps on this.

E-mail Notification

An email notification will be sent to the contact listed for the supplier on the RFx. The e-mail address used is that listed in the supplier's Oracle profile. When accessed, the details on when the RFx will be open for bidding and when it will close will be presented. Review the proposal as outlined above.

From the email, click:
- **Yes** to acknowledge your intend to participate in the RFx OR,
- **No** if you do not intend to participate in the RFx.

Access the application to view the RFx details and submit your quote. See Create Quote for steps on this.

Supplier Sourcing Home Page

1. Expand **ATT Sourcing Supplier** > **Sourcing**.
2. Select **Sourcing Home Page**.
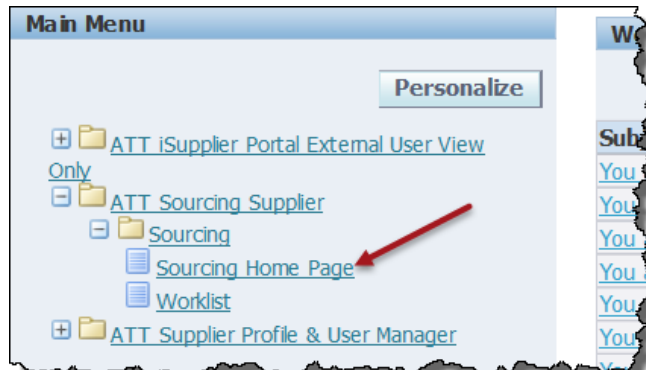
All RFx you've acknowledged will be listed in **Your Active and Draft Responses**.

- An RFx with a **Response Status** of **Active** represent quotes that have been prepared and submitted for consideration.
- **Draft** indicates a quote that has not been submitted.

RFxs that have not been acknowledged or you haven't created a quote for will be listed in the **Your Company's Open Invitations** section.

To acknowledge your intend to participate from here:

- Click the RFx to open it. The **Terms and Conditions** window will appear.

- Review the non-disclosure agreement listed. You can also click **Export to PDF** to export the details to pdf.
- Once you've reviewed the details, scroll down to the bottom of the page and click the checkbox provided.

- The **Accept** button becomes available; click it.
- You will be taken into the RFx. Review the tabs shown for information on the proposal; see Review the Proposal for more on this.
- Select **Acknowledge Participation** from the **Actions** dropdown box to the right of the screen once done. Click **Go**.

- The **Acknowledge Participation** screen will appear. If an acknowledgement has already been submitted a warning message will be displayed.

- If no acknowledgement has been submitted click:
  - **Yes** to acknowledge your intend to participate in the RFx OR,
  - **No** if you do not intend to participate in the RFx.

- Click **Apply** to save your selection. Your acknowledgement will be submitted to the RFx buyer.

You can now create your quote if you intend to participate.

Create Quote

Log into the application and access your sourcing home page if you have not already done so.

1. Click on the desired RFx to review the details.
   - If the **Terms and Conditions** had not been previously reviewed and accepted, you will be prompted to do so at this point.
   - Once you have reviewed them, scroll down to the bottom of the page and click the checkbox provided.

   - Click **Accept**.
2. Select **Create Quote** from the **Actions** dropdown menu to the right of the screen then click **Go**.

3. The **Create Quote** screen will appear. You will be required to populate the required values on the **Header** and **Lines** tab. This can be done by:
   - Entering them directly into the application or
   - Selecting **Quote by Spreadsheet**. Click here for steps on how to accomplish this.

Quote via GUI

Header Tab

1. If you'd like to list a reference number for your use enter it into the **Reference Number** field; you can also provide a note to the buyer in the field provided.

2. Attachments for the buyer's review can be added to the quote by selecting and following the onscreen prompts.
3. Navigate to the **Requirements** section if available and populate any required fields listed here.

4. Click **Save Draft** to save your entries. Access the **Lines** tab.

Lines Tab

1. Click on the 🖉 as prompted on your screen (see below).

2. Review the information provided carefully; areas requiring your input will contain a blank field. List the total cost of the service required in the **Quote Price** field. Indicate when service will be delivered in the **Promise Date** field.

> ❗ **Important!** If **Cost Factors** (see definition below) have been included in the request, the **Quote Price** field is not editable. The **Line Price** field and **Quote Price** field will be populated based on your **Cost Factors** input.

3. Scroll down to the **Attributes** section; populate any blank fields here that require your input. Scroll down to the **Cost Factors** section (if present). Cost factors allow you to identify and negotiate on additional costs related to a **Goods** or **Service Amount** line type. You can use cost factors to obtain a more realistic idea of the total cost of an item or service by factoring in any additional costs beyond just price. Such costs could include additional costs such as consulting or training, or internal costs such as switching costs.

4. Populate any blank fields here that require your input.

> ![] **Important!** If **Cost Factors** have been included in the request, you will not be able to submit your quote until you've addressed all the included **Cost Factors**.

5. Click **Save Draft**.
6. If there are multiple locations associated with the RFx, they will be listed in the Line field in the top right of the form. Select the next location you'd like to process from the dropdown list then click **Go.**

7. Once all locations have been processed, click **Apply**; you'll be returned to the **Create Quote** screen.
8. Click **Save Draft** then access the **Project Dates** tab.

Project Dates Tab

The **Project Dates** tab will contain design and construction dates relative to projects created in REM-CRE Tririga. This tab is relative to D&C projects which originated from REM-CRE. In this case, the dates section (shown below) may be required.

For all other CRE entities (EH&S, S&I, etc.), no action will be required on this tab.


In those instances where the date fields are present, suppliers are required to populate all fields with an asterisk in the **Consultant & Contractor Dates** section.
- Required date fields are determined by the project manager; they may differ from project to project.
- Required date fields must be populated to successfully save and submit the quote.

To populate required fields on this tab:
1. Click 🔲 next to the field.
2. Use the calendar that appears to select the desired month, day and year.
3. Repeat steps 1 and 2 for each date field.
4. Click **Save Draft** once done.

Quote via Spreadsheet

This option allows you to enter your values into an excel workbook generated by Oracle and upload it into the system.
1. Select **Quote By Spreadsheet**.
2. The **Create Quote: Quote By Spreadsheet** screen will appear.

3. In *Step 1: Export Spreadsheet* click the **CRE Quote Spreadsheet – Excel Style (.xls)** radio button then select **Export.**

> **Note**: The **Requirements** section of the **Header** tab is not included in the generated spreadsheet. Be sure to navigate to the Header tab in the GUI and populate any fields that require attention in this section.

4. Navigate to where it was saved and open it. The details of the RFx will appear.

5. Populate all columns flagged as **Supplier Enterable** with the required information.
6. Populate each **Services** column (these are the columns in green and yellow) with your pricing (see below). The listed value for each field should be for one unit of measure (row 3) not the total cost of the service.

7. Save the spreadsheet to a local drive once done. You can now import the spreadsheet into Oracle.

Import the Spreadsheet

1. From *Step 2: Import Spreadsheet*, click the **CRE Spreadsheet (.xls)** radio button.
2. Click **Browse**.

3. Navigate to the local drive where the completed spreadsheet is saved and select it. Click **Open**.
4. The file path will be outlined in Oracle; click **Import**. The values from the spreadsheet will now be visible in Oracle.
5. The **Promised Date** field is not required and can be left blank. Click **Save Draft**.
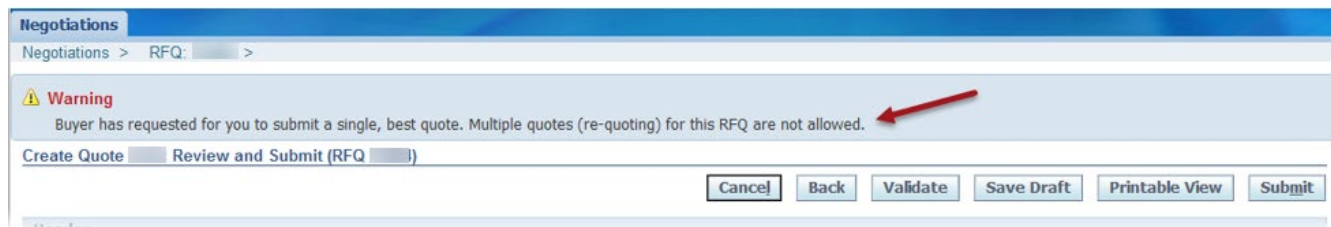

6. You can now submit your quote as outlined next.

Submit Quote

1. Once all requested information has been listed on the **Header** and **Lines** tabs click **Continue**.
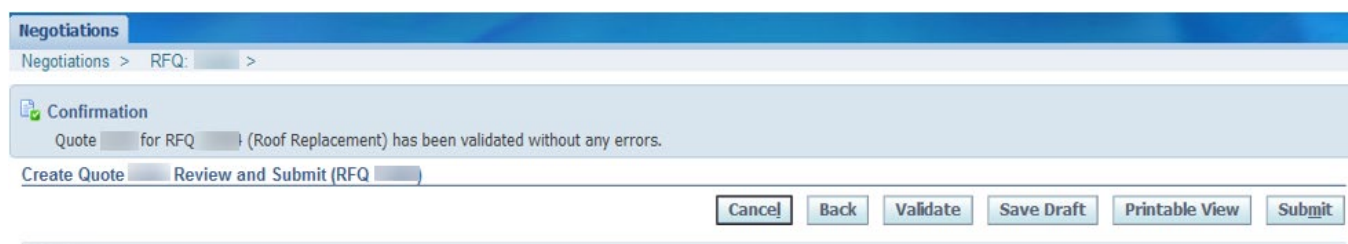

If only a single quote is allowed by the buyer, a warning message will be presented advising of this.

You can choose to validate the quote at this point to ensure no required fields have been left unpopulated; to do this click Validate . A confirmation or error message will be returned depending on what is found.

2. Scroll through the page to ensure all required information has been provided. Pay close attention to the **Requirements** and **Lines** section to ensure the prices you wish to submit are accurately listed. If any of the information is inaccurate, click Back to make modifications.
3. Once satisfied with the quote click **Submit**; a message confirming the quote has been submitted will be received.