

Appendix B

GUIDELINES FOR OBTAINING ELECTRONIC QUOTE & ORDER PLACEMENT

Rev. 11/23/99

A. GENERATING THE ONLINE ELECTRONIC QUOTE

The agency buyer or technical contact responsible for initial selection or configuration of the orders may find these guidelines helpful. Suppliers are charged with providing necessary training specific to the use of their Louisiana Contract Page.

1. Access the Office of State Purchasing (OSP) website: www.doa.louisiana.gov/osp
2. Click on the "Approved Catalog Contracts" link under the "Statewide Contracts" button.
3. Select the catalog contract from which you wish to shop from the listing provided. You will be taken directly to the Louisiana contract page website for the selected supplier.
4. Create a "Shopping Basket"/electronic quote following the instructions provided on the supplier's Louisiana contract page.
5. If you are shopping for microcomputers, it will be necessary to configure the system with required features and accessories (Ex. Processor speed, memory, hard drive, operating system, modem, CD-ROM, network card, zip drive, speakers, batteries and any other options desired for the order). Once satisfied with the configuration selected, "update" the price and quantity(s) for final configuration.
6. Another review of order is recommended. If satisfied with order, save "shopping basket" /electronic quote. **Jot down the electronic quote number assigned and screen print the page for your file.**
7. Some websites allow you to save the "shopping basket"/electronic quote as an HTML document. This could be attached to an email and viewed with a browser by any agency approvers. If quote can be saved as HTML document, click on "File" on the title bar, then click "save as", and select "html" as the file type. You should use a descriptive file name that will help you find this order easily (Ex. your name and the electronic quote number).

Once the supplier has confirmed receipt of the electronic quote (or, during the time this is occurring), the following steps may be completed:

1. Retrieve the electronic quote using the electronic quote number and print this page for future reference. Compare quote content to screen print to ensure that your order is as requested. **The same process as described in Item #7 above, can be used to save this as an HTML document to be attached to an email and forwarded to approvers.**
2. Forward quote via email, or manually, for approvals in compliance with your internal policy.

B. PLACING THE ORDER

The purchasing agent should generate the order only after:

1. The "shopping basket"/electronic quote has been finalized.
2. Supplier has assigned a quote number.
3. All internal approval requirements have been satisfied.

General Instructions for all Users:

1. When printing the electronic quote off the web, one may need to adjust the margins to ensure the entire page is printed.
2. Writing the Contract Number, Contract Release Order (CRO)*, or Purchase Order (PO) number on the quote is recommended.
3. Fax or mail a copy of the electronic quote with your order to the vendor.
4. Since PC contract terms are "price in effect at time of shipment". If price on invoice is lower than order price, pay lower price invoiced.
5. Questions related to configuration, pricing, or hardware options, should be directed to the applicable vendor. Administrative questions related to the contract or AGPS assistance should be directed to the Office of State Purchasing.

* Contract Release Order (CRO) flow chart and Requisition (REL) flowchart are attached for your reference.

Ordering Information for AGPS Users:

- ❑ The contract number and commodity code required for order processing is noted on the first page of the supplier's "Louisiana Online Store", or Catalog Contract page.
- ❑ Catalog contracts will have a limited number of contract lines, generally only one. This contract line will be repeated for additional order lines and the description changed as required.
- ❑ A brief description in OMOD and attaching the electronic quote for detailed information, is recommended.
- ❑ **Prior to entering order in AGPS, entity should consider how order will be received. It is recommended that a different order line be entered for each set of units to be delivered; or, for each different units of measure.** (Ex. 4 ea. monitors and 4 ea. CPUs--would be issued as two order lines; 1 lot of 4 PCs complete with monitor and CPUs--would be issued as one order line; or 4 ea. Monitors and 2 pr. Speakers--would be issued as two order lines.)
- ❑ The quote number **must** be entered in the CAT IND field (catalog indicator field). You may also enter in the order title line and OMOD.
- ❑ Leave price field blank.
- ❑ Enter the **total amount of the applicable order line** in the CAT \$ field.
- ❑ Review the electronic quote to ensure that all items have been entered on AGPS order.

Receiving Information for AGPS Users:

- Use detailed information on electronic quote to compare the items received against the items ordered.