MyFloridaMarketPlace (MFMP)

Information Technology Staff Augmentation Services

State Term Contract

eQuote Training

FLORIDA DEPARTMENT OF MANAGEMENT SERVICES
state purchasing
We serve those who serve Florida

Agenda

- Overview and Benefits of eQuotes
- Creating an eQuote
- Vendor View
- Managing eQuotes
- Awarding & Viewing Results
- Resources

What is an eQuote?

- eQuotes are electronic, informal quotes, created using the MFMP Sourcing application
- Customers have the option to integrate their requisition with an eQuote in MFMP Buyer (called the integrated eQuote creation method)
- Agency customers issue eQuotes to selected vendors when creating their eQuote. There are currently over **45,000 vendors** registered to receive eQuotes in MFMP

Benefits of eQuotes

- Web-based paperless application
- Similar look and feel to MFMP Buyer and MFMP Analysis applications
- Consistency in requests to vendors (both formal and informal)
- Captures and stores all content related to the request in one location
- Auto-saves your work
- Easily score vendor responses to make award decisions
- Stores all vendor communications and bids
  - Allows for easy download of all responses, as necessary (e.g., public records requests)

When to use an eQuote

- Agency customers needing IT staff augmentation services must create a Request for Quote (RFQ) eQuote event in MFMP Sourcing, each time they desire to solicit those services
- For more information about the specific requirements of this State Term Contract (STC), 80101507-SA-15-01, see the State Purchasing website

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Manual vs Integrated Method

Manual

- Events are not electronically linked to the requisition in MFMP Buyer
- Agency customers can use the copy function to copy past events
- After awarding to a vendor(s), the agency customer must manually create a requisition or MFMP contract

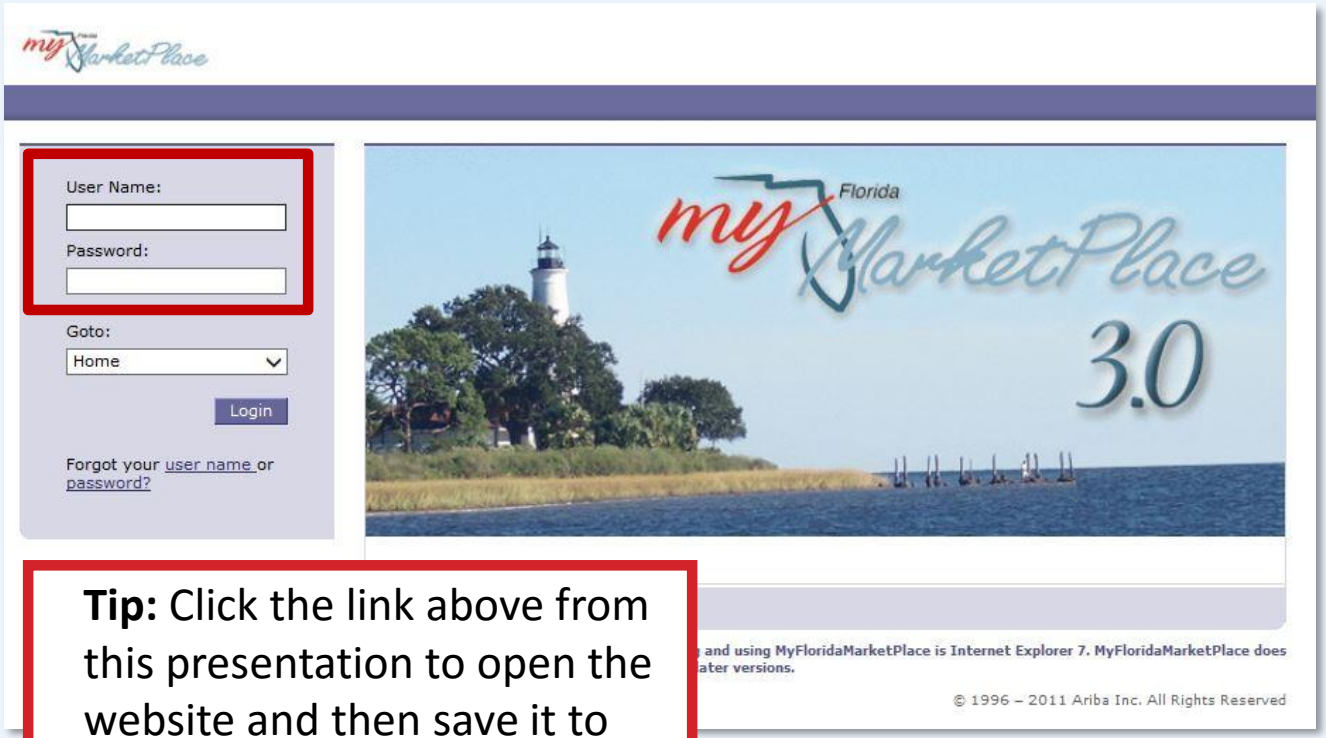
Integrated

- Events and requisitions are electronically linked within the Buyer & Sourcing applications
- Events cannot be copied; however, customers can import past events or copy content from past events
- When agency customers award an eQuote to a vendor, the system automatically updates the requisition with the awarded vendor and the line item pricing

Creating an Integrated eQuote

To create an eQuote from a requisition, log into MFMP Buyer.

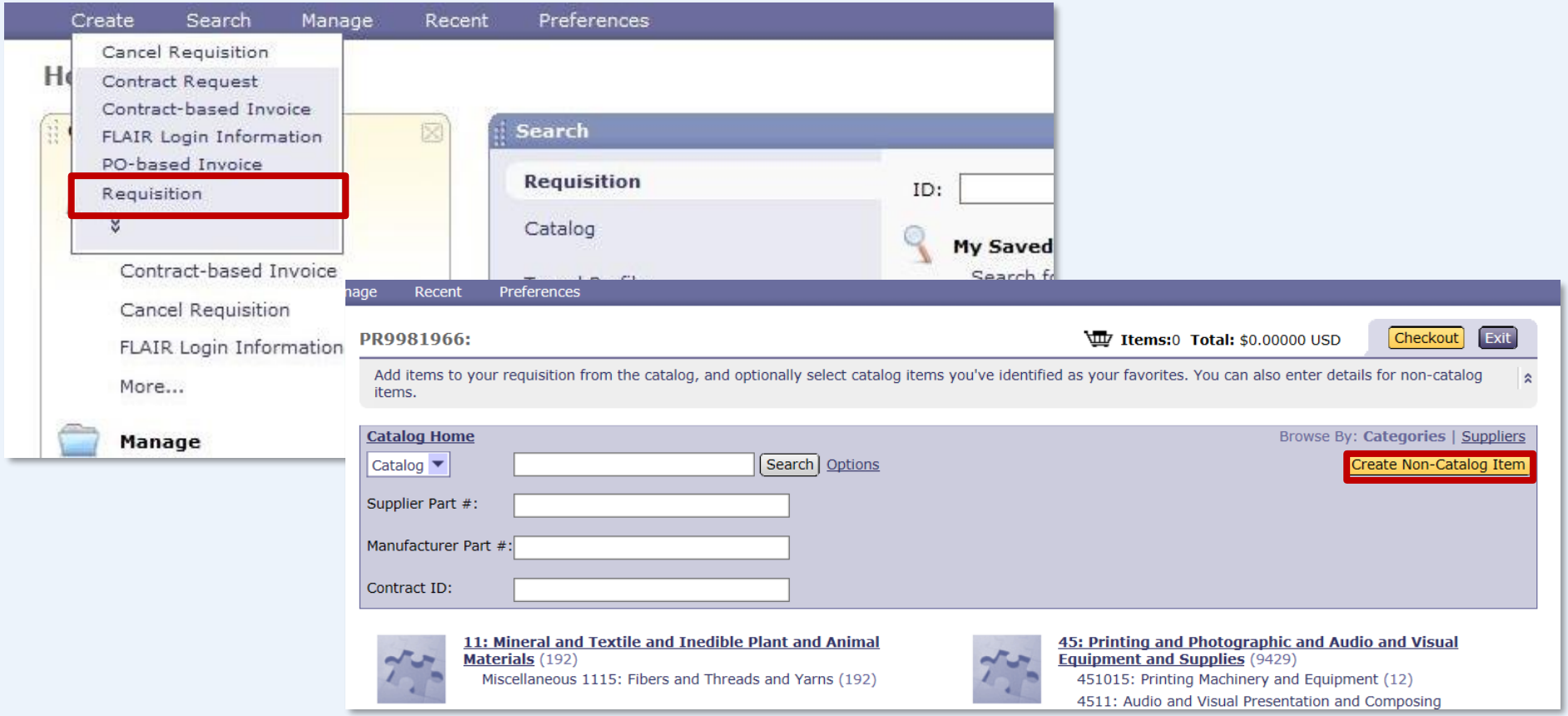
If you do not have a username and password, refer to the "Resources" section of this training and work with your agency's MFMP System Administrator to get access once you complete this training.



Tip: Click the link above from this presentation to open the website and then save it to your browser's favorites.

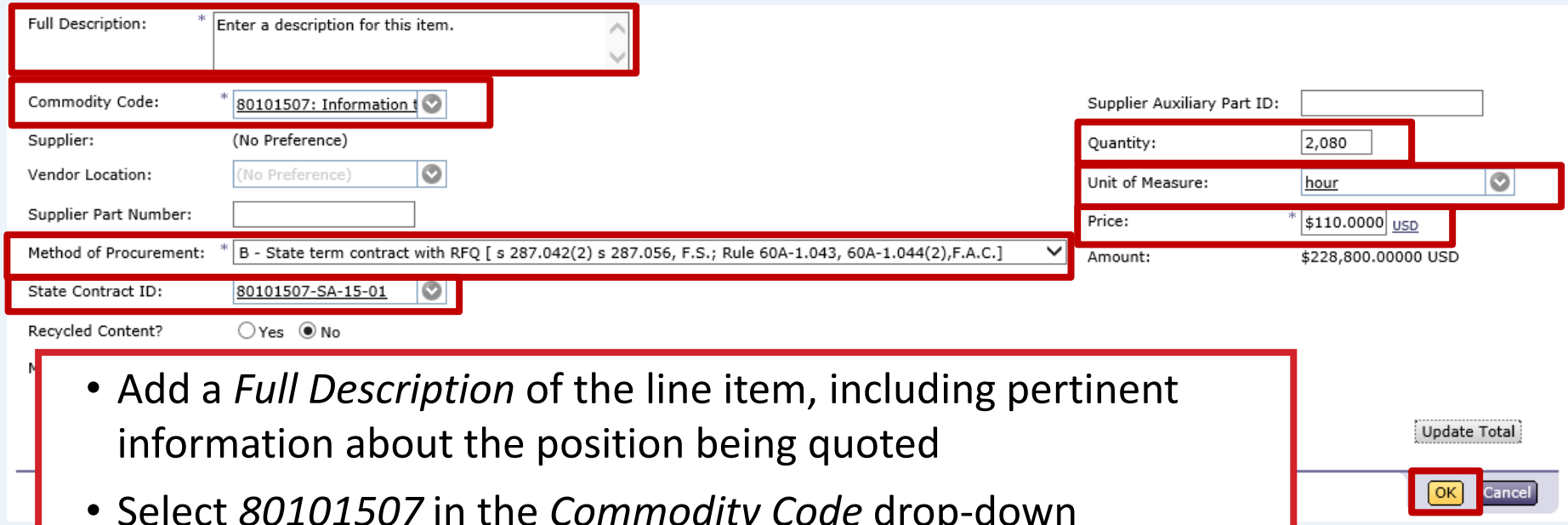
Creating a Requisition

- Click *Create* on the menu bar and select *Requisition*
- Click the yellow *Create Non-Catalog Item* button



Creating a Line Item

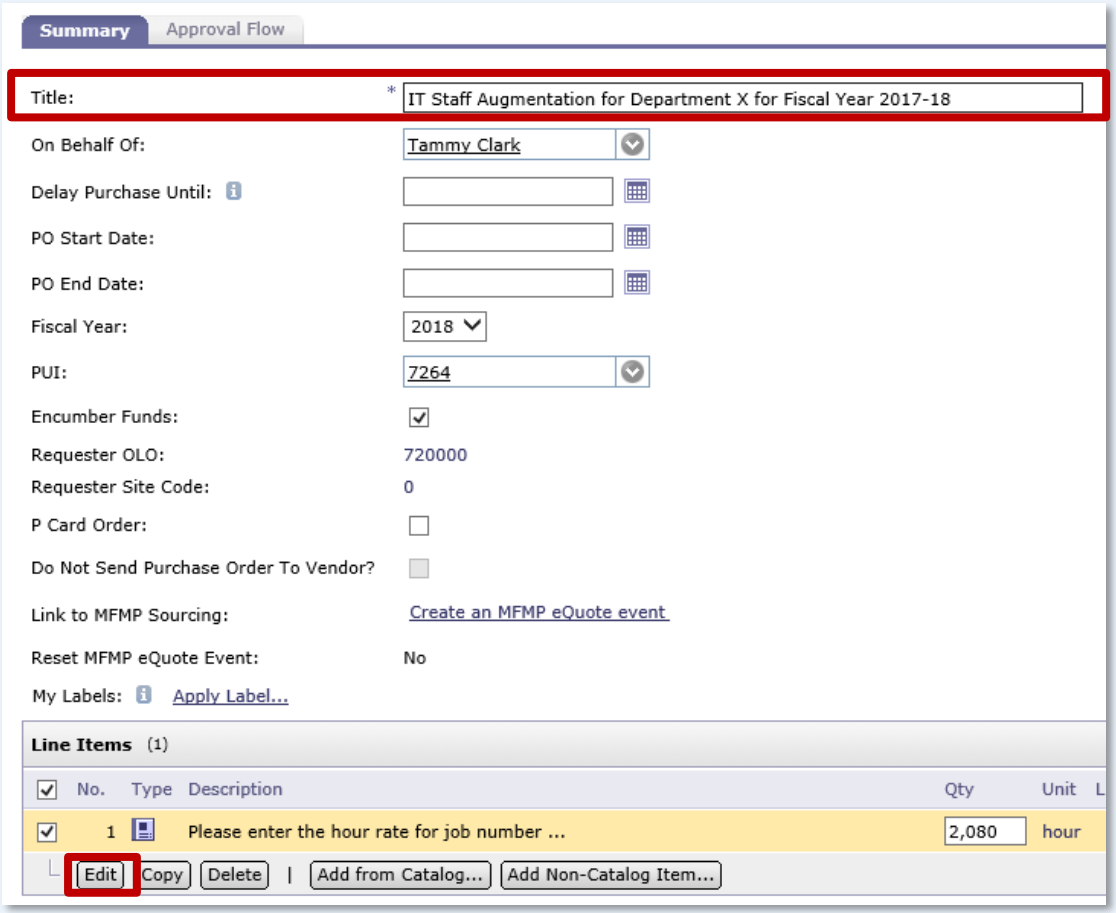
Create the line item(s) for your eQuote.



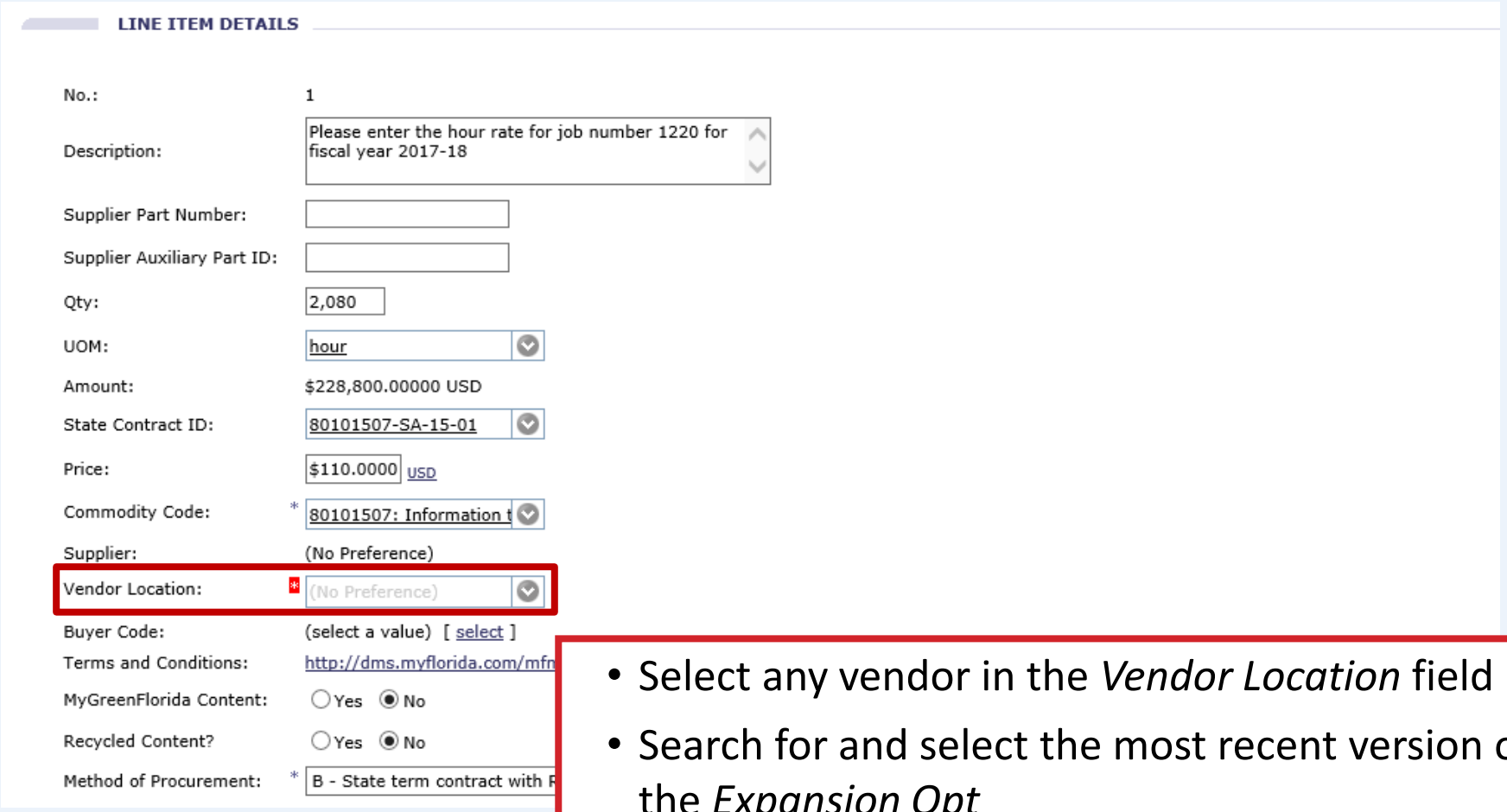
- Add a *Full Description* of the line item, including pertinent information about the position being quoted
- Select *80101507* in the *Commodity Code* drop-down
- Select *B* in the *Method of Procurement* drop-down
- Select *80101507-SA-15-01* in the *State Contract ID* drop-down
- Enter the number of hours being quoted in the *Quantity* field
- Update the *Unit of Measure* field to *hours*
- Add the *Price* (historical hourly rate, if known)
- Click *OK*

Requisition Summary

- Add a *Title* to the requisition
- Click *Edit* in the **Line Items** section
- Add additional line items as needed



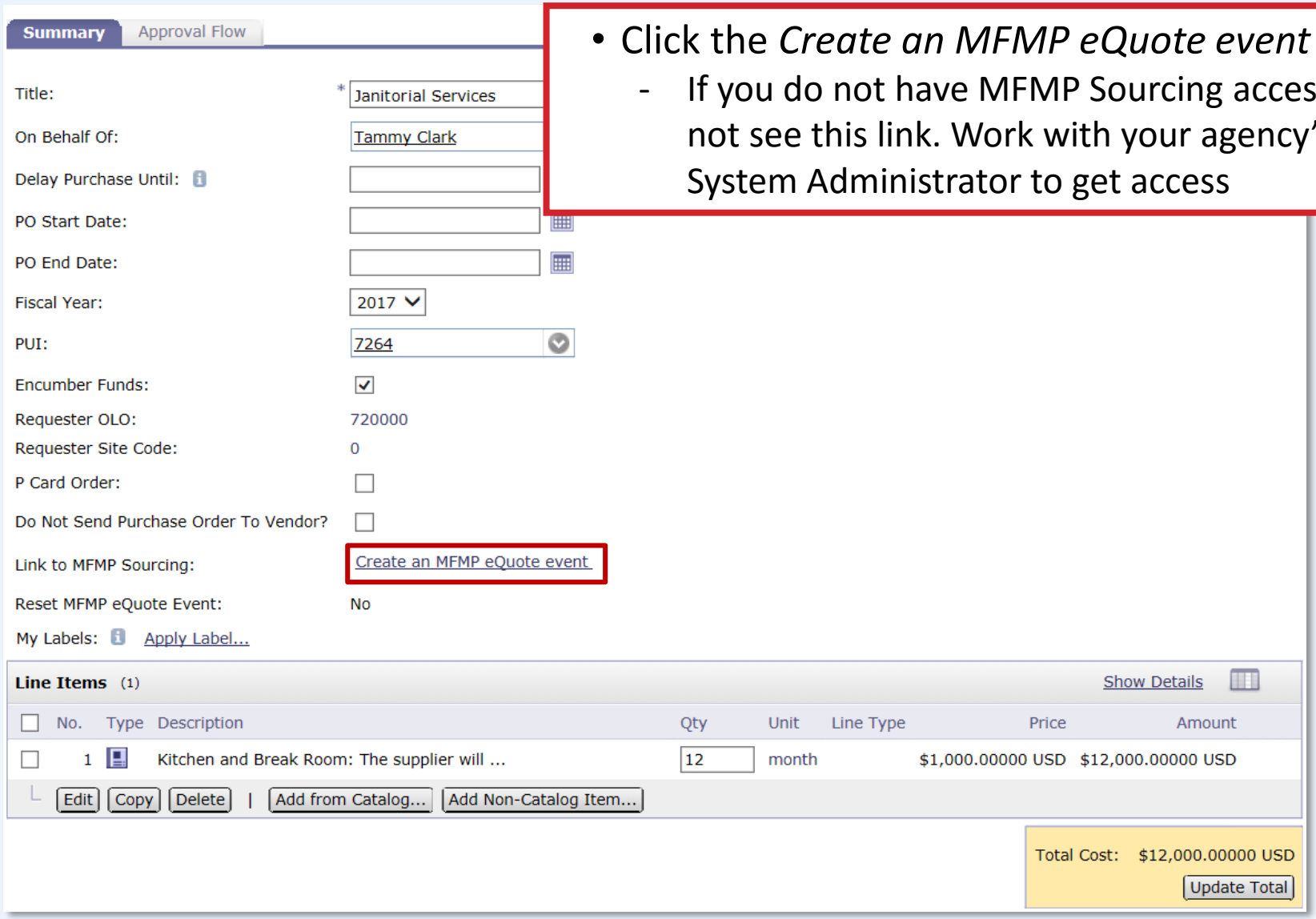
Line Item Details



- Select any vendor in the *Vendor Location* field
- Search for and select the most recent version of the *Expansion Opt*
- Scroll down the entire page to confirm all fields are populated correctly
- Click *OK*

Link to MFMP Sourcing

- Click the *Create an MFMP eQuote event* link
  - If you do not have MFMP Sourcing access, you will not see this link. Work with your agency's MFMP System Administrator to get access



Demonstration

I will now demonstrate creating a draft requisition that's tied to an integrated eQuote in the MFMP Buyer Training Environment.

Log into MFMP Sourcing

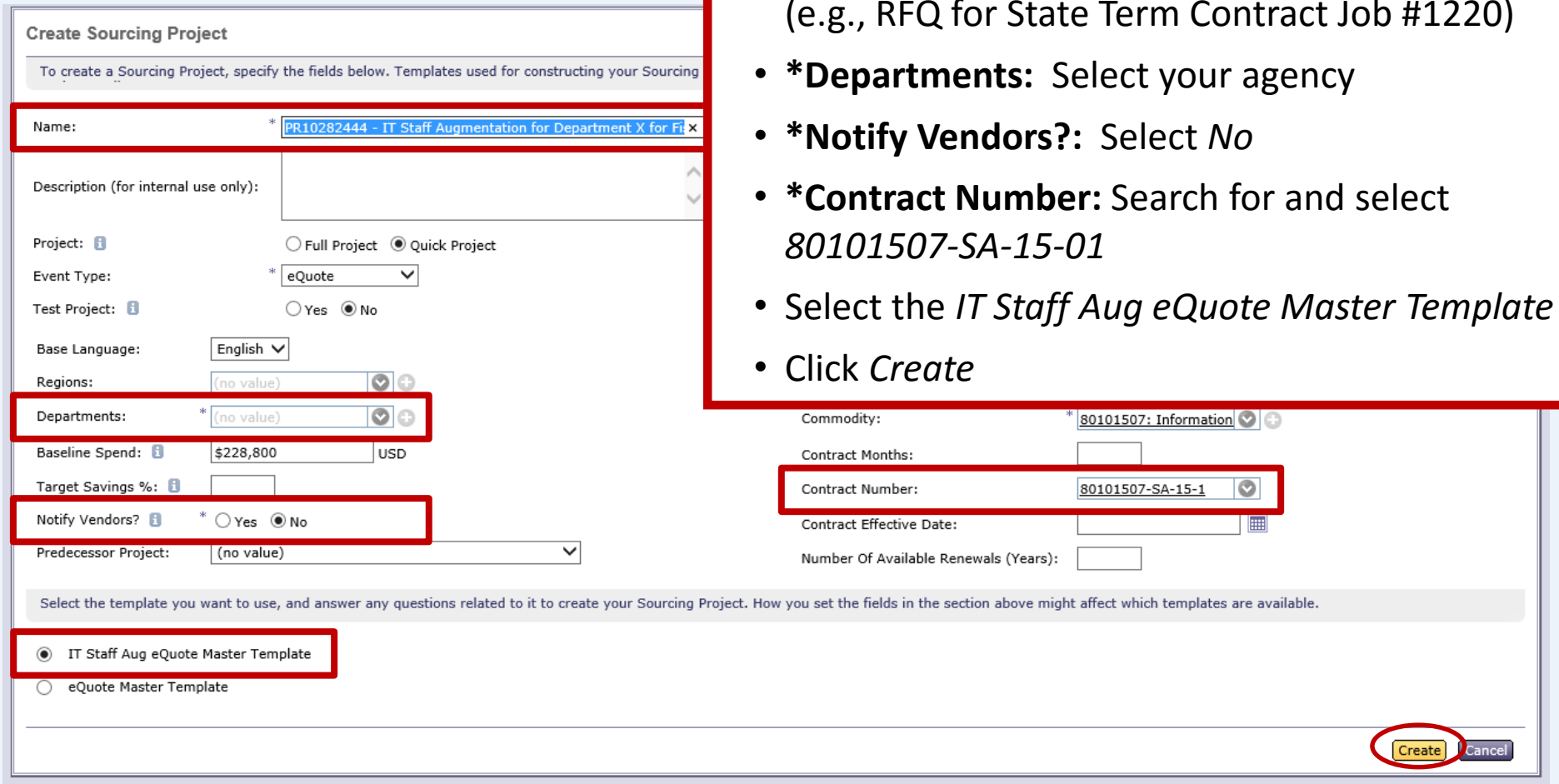
After selecting the *Create an MFMP eQuote event* link in MFMP Buyer, customers must log into MFMP Sourcing.

If you do not have a username and password, refer to the "Resources" section of this training and work with your agency MFMP System Administrator to get Sourcing access once you complete this training.

eQuote Overview

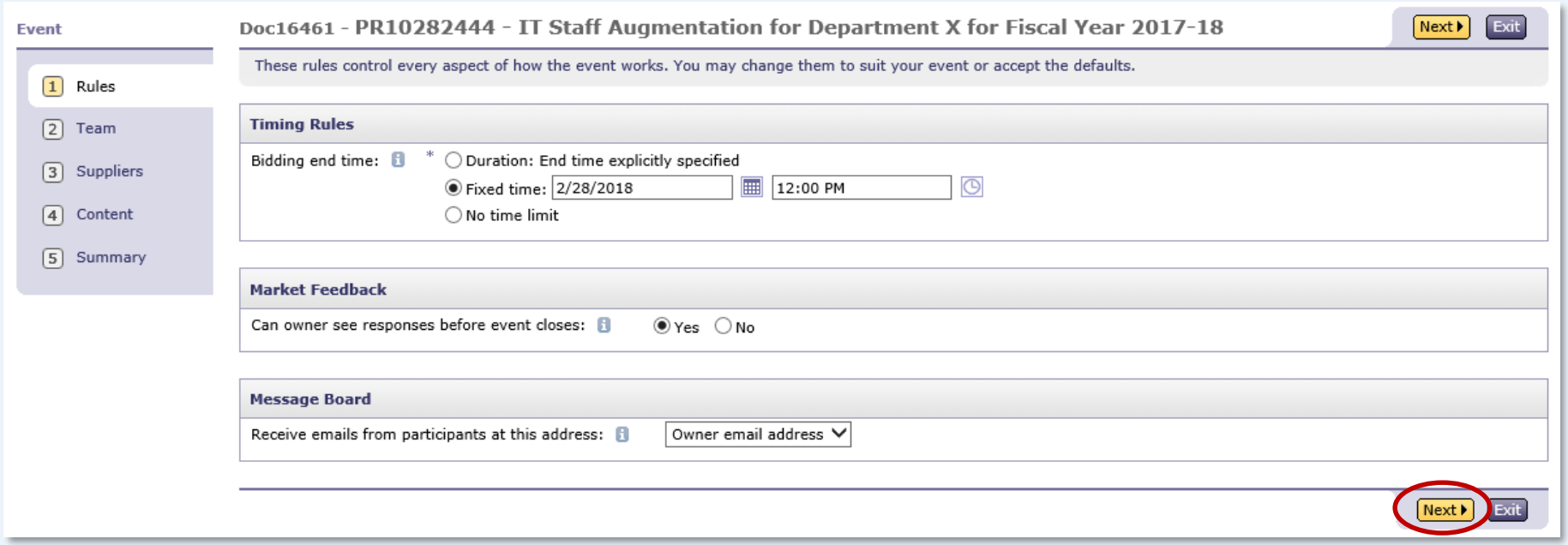
Complete all required fields marked with an asterisk:

- ***Name**: Type a descriptive title for the eQuote (e.g., RFQ for State Term Contract Job #1220)
- ***Departments:** Select your agency
- ***Notify Vendors?:** Select *No*
- ***Contract Number:** Search for and select *80101507-SA-15-01*
- Select the *IT Staff Aug eQuote Master Template*
- Click *Create*



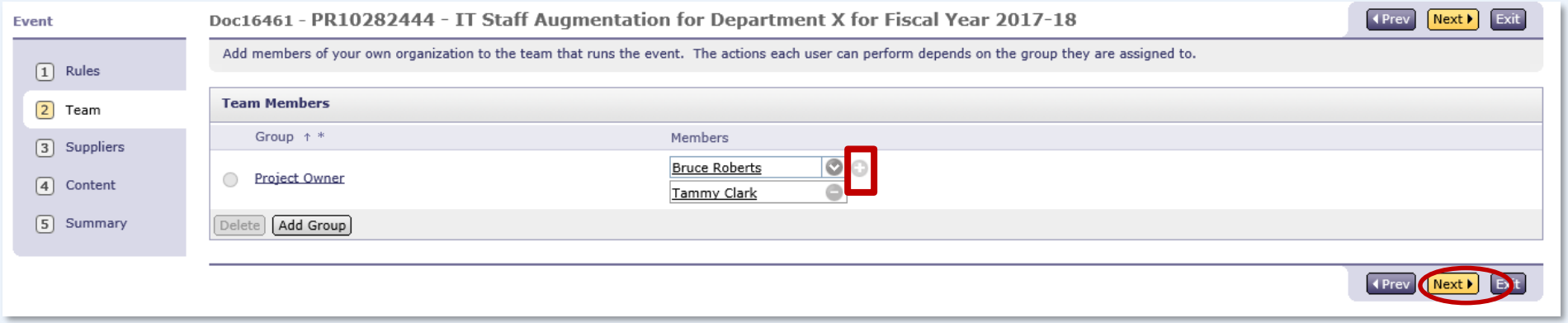
eQuote Rules

- Event Rules control how the event works.
  - **Timing Rules** – select the end time of the event and how long you will accept vendor responses
  - **Market Feedback** – select *Yes* to be able to view vendor responses in Sourcing before the event closes
  - **Message Board** – identifies which email address you will use to receive messages from vendors



eQuote Team

- MyFloridaMarketPlace Sourcing automatically adds the eQuote creator from the requisition as the Project Owner (Project Owner = full edit access)
  - The MFMP team recommends adding additional team members
- All team members added as Project Owners will receive system email notifications when vendors submit questions via the message board



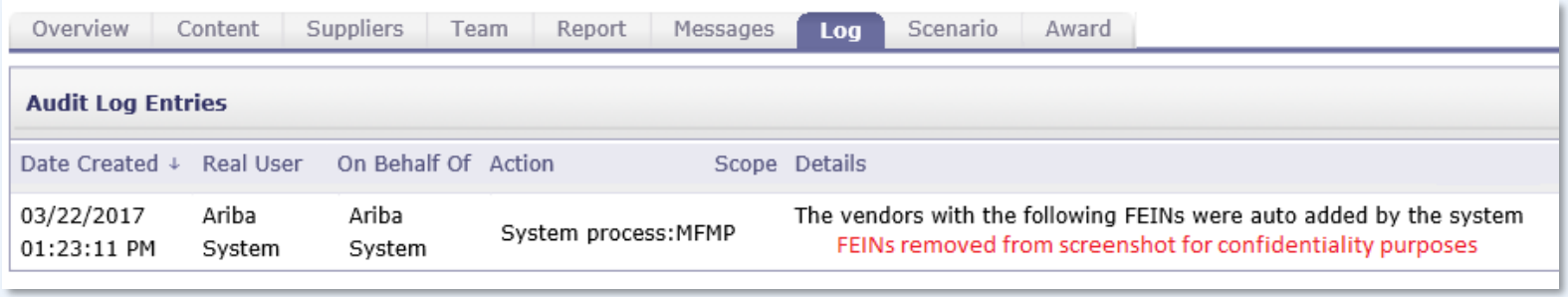
Auto-Population of Vendors

- All eQuotes created from the Information Technology Staff Augmentation Services contract (80101507-SA-15-01), will have **five** randomly generated contracted vendors (based on FEIN) added to the eQuote
- This functionality is designed to increase competition among vendors on the Information Technology Staff Augmentation Services STC
- Agency customers have the option to add additional vendors and to remove the auto-populated vendors, if desired
  - The STC requires that customers add at least **three** additional vendors to the eQuote (at least **8 total** vendors)

Auto-Population of Vendors Process

- View auto-populated vendors on the **Suppliers** page
- Add or remove vendors as desired. The contract requires customers to manually add at least three additional vendors

- After publishing the eQuote, Project Owners may validate that MFMP added vendors (based on FEIN) on the **Log** tab



Adding Content

- The **Content** page contains the information that vendors see and respond to in MFMP Sourcing
- eQuotes created from the Information Technology Staff Augmentation Services contract contain pre-populated information, including:
  - Instructions, trainings and contact information for vendors
  - Link to upload a scope of work (SOW)
  - Line items will automatically be added to integrated eQuotes
  - Field to enter ceiling rates for each line item
  - Vendor certification that they agree to the requirements
  - Job names/numbers and variances that must be selected on each line item
  - Required fields for vendors to upload their resume(s) and self-

Demonstration

I will now demonstrate creating the Sourcing Project portion of an integrated eQuote in the MFMP Sourcing Training Environment.

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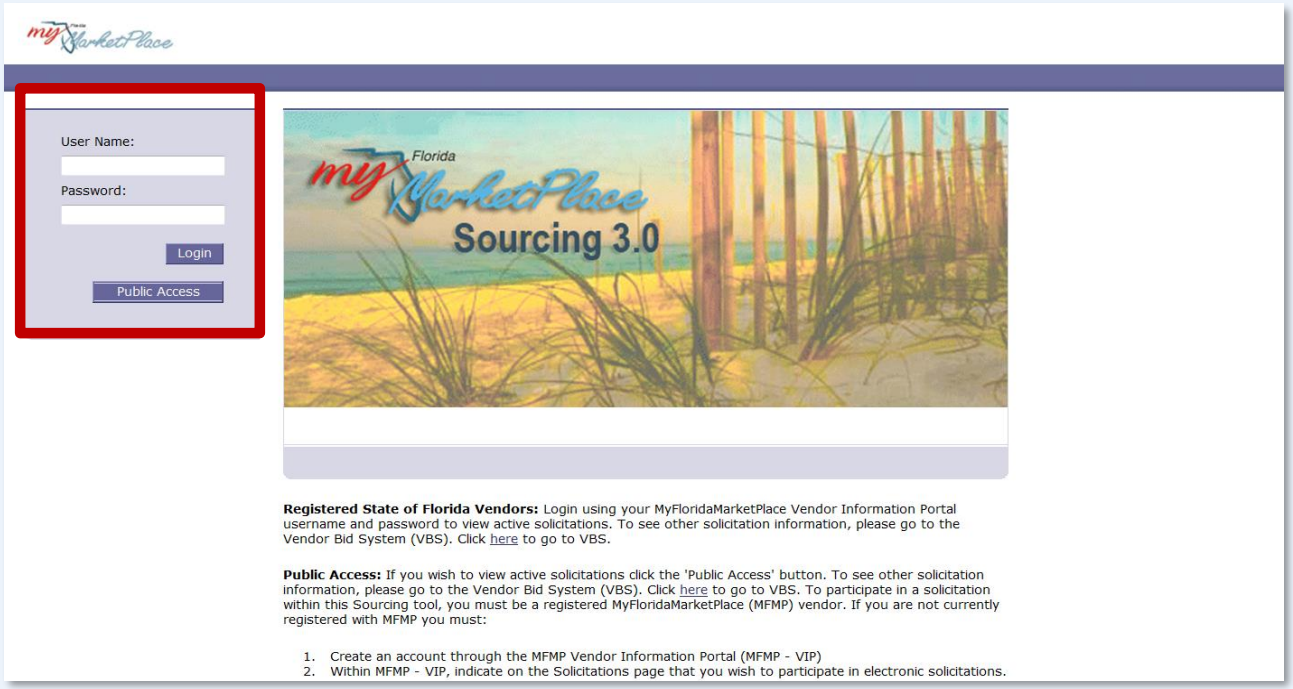
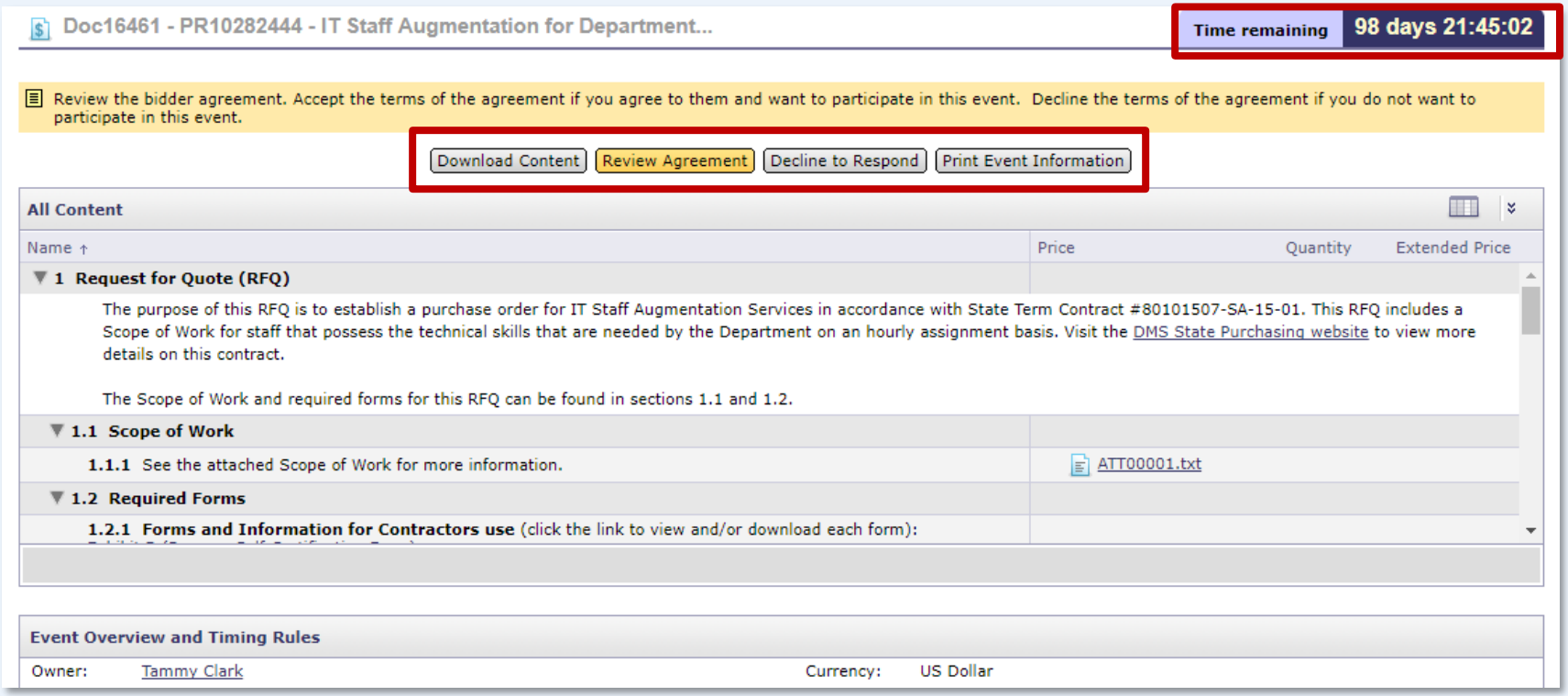
Vendor View

Vendors that accept to participate in electronic solicitations in their MFMP VIP (Vendor Information Portal) account, can log into MFMP Sourcing to participate in solicitation events (formal and informal).



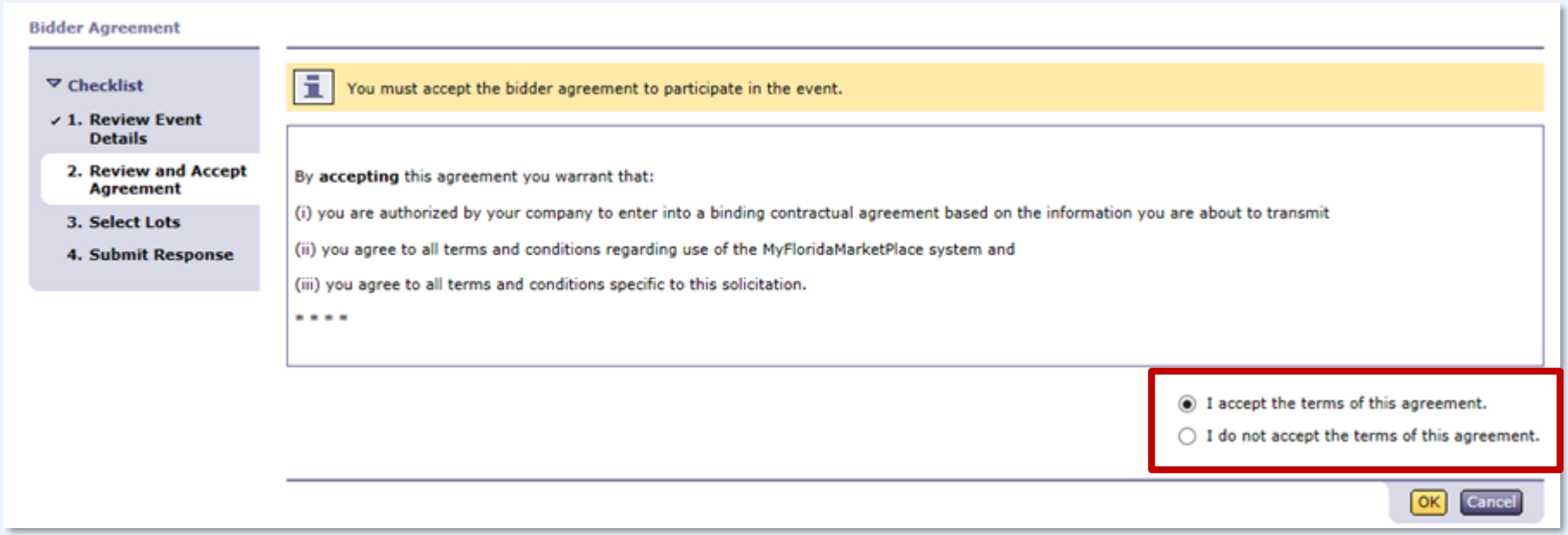
Vendor View

- The event clock shows the eQuote's remaining time
  - Vendors who wish to respond must click on *Review Agreement* and accept the terms of the agreement
- Vendors can download content, print event information, or decline to respond to the event

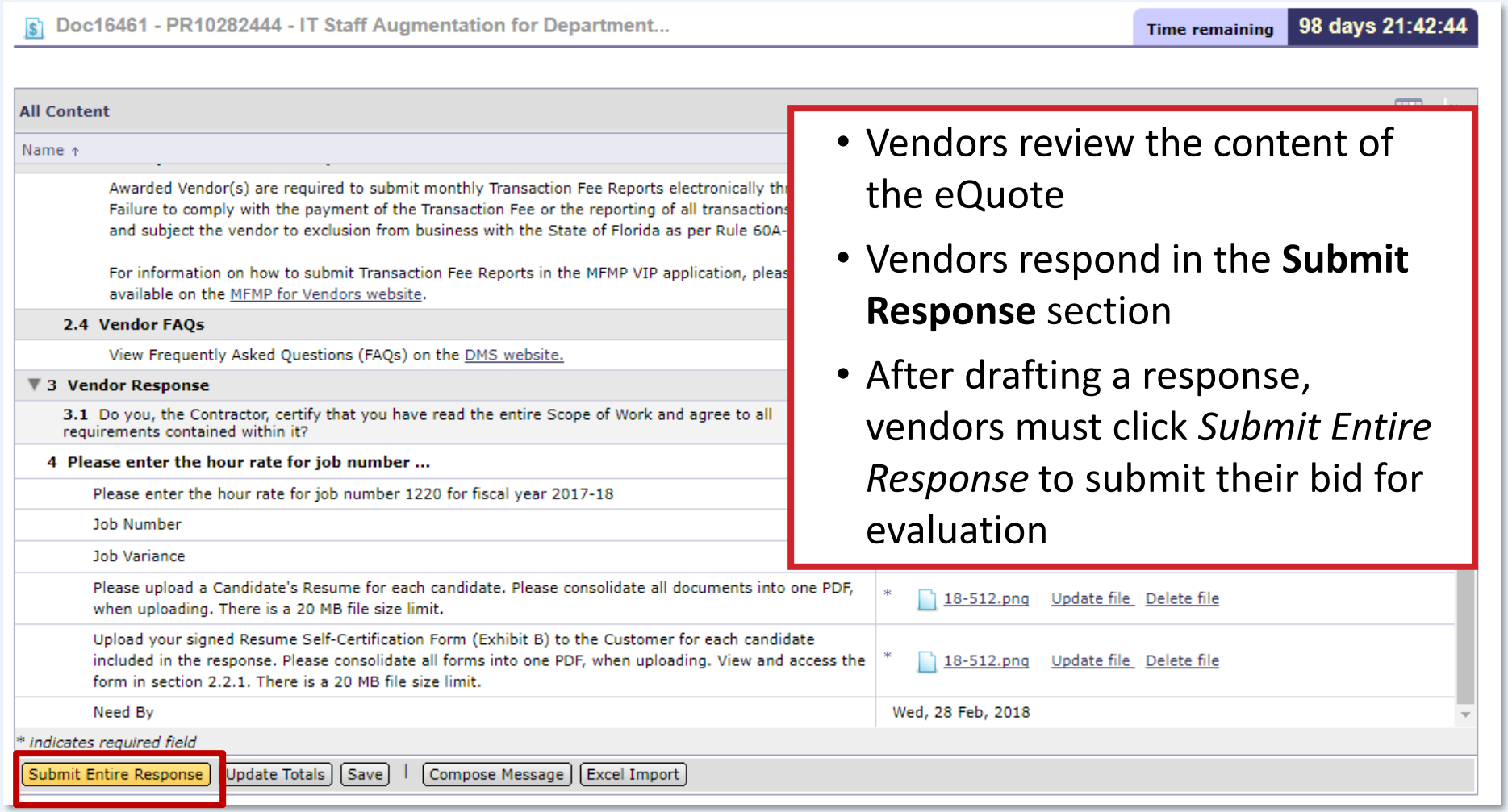


Vendor View

- Selecting the *Review and Accept Agreement* link will display the terms of the agreement vendors must accept to submit an official response
- Vendors that are registered in MFMP have already accepted the terms of use



Vendor View



- Vendors review the content of the eQuote
- Vendors respond in the **Submit Response** section
- After drafting a response, vendors must click *Submit Entire Response* to submit their bid for evaluation

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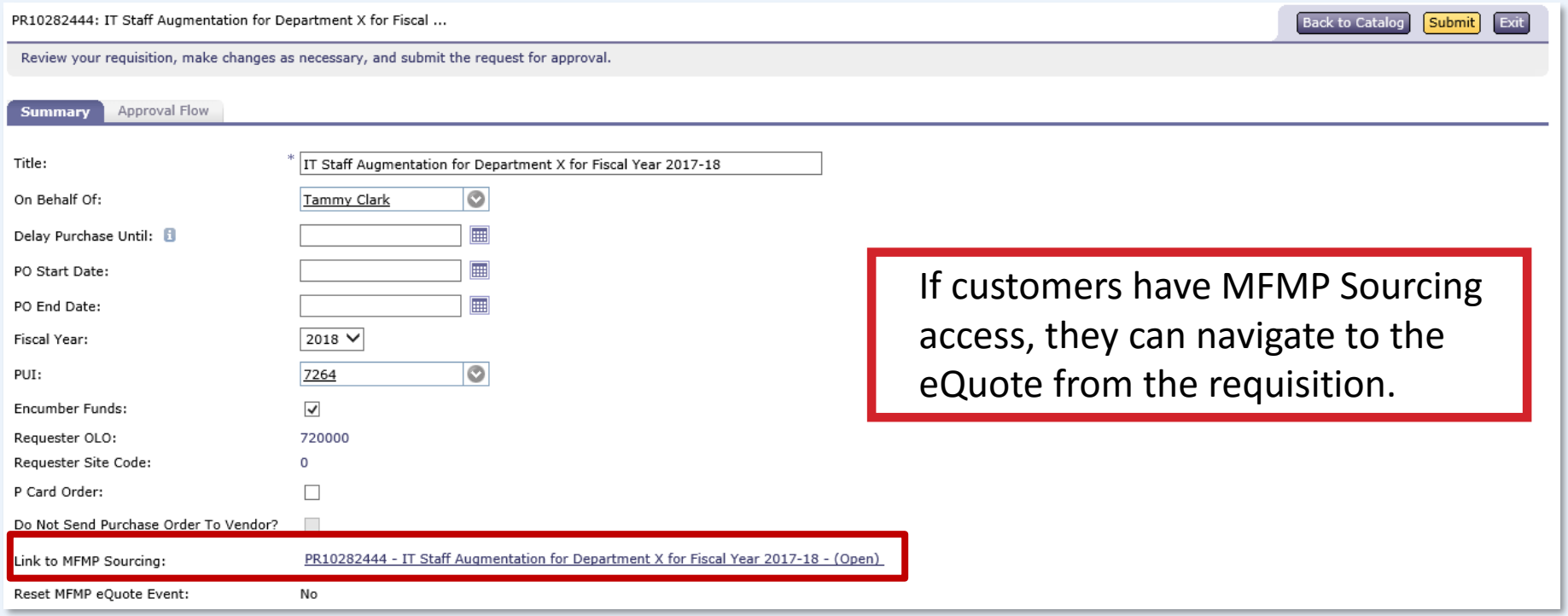
Accessing eQuotes

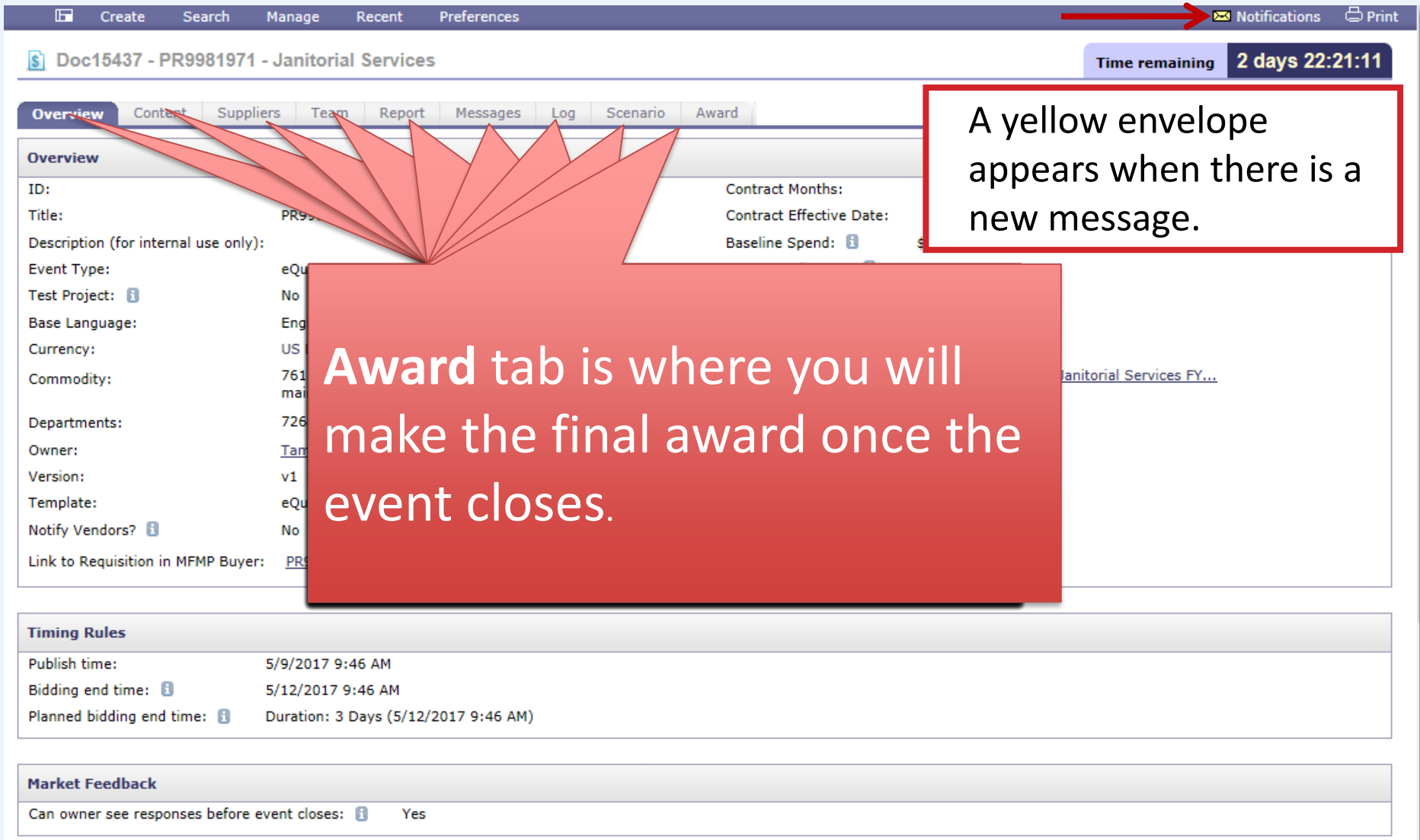
Customers can access eQuotes from the link on the requisition (if applicable) or directly in MFMP Sourcing.



If customers have MFMP Sourcing access, they can navigate to the eQuote from the requisition.

Managing eQuotes

Use tabs and notifications to monitor eQuotes.

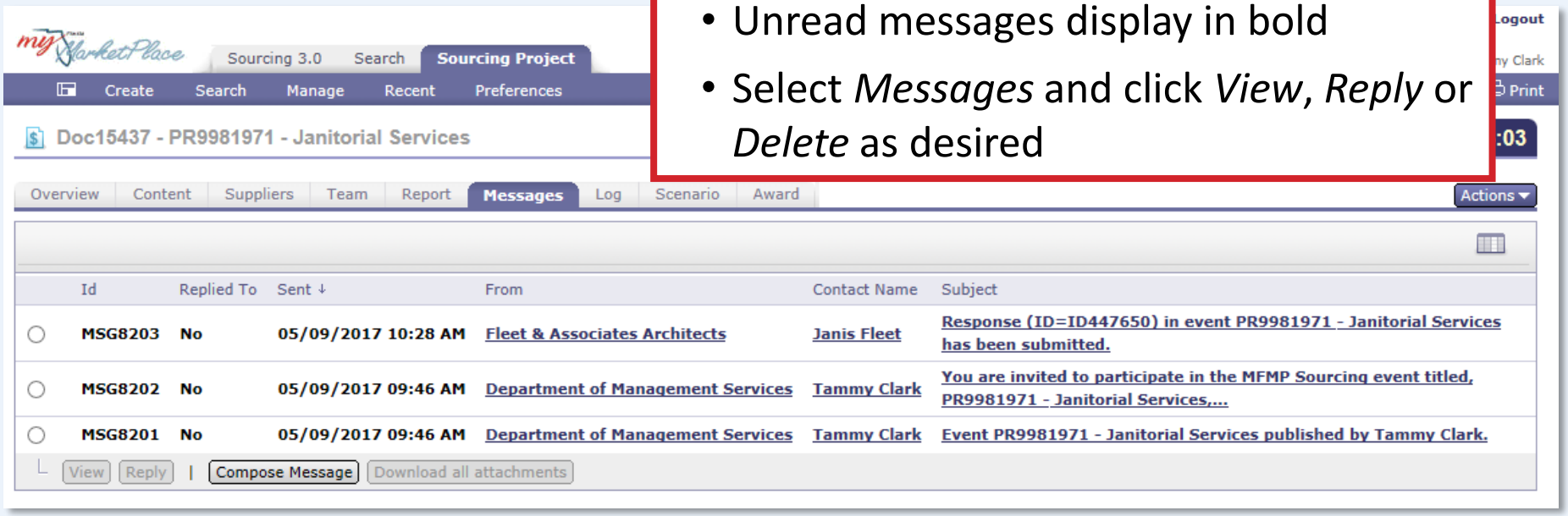


A yellow envelope appears when there is a new message.

Award tab is where you will make the final award once the event closes.

Messages

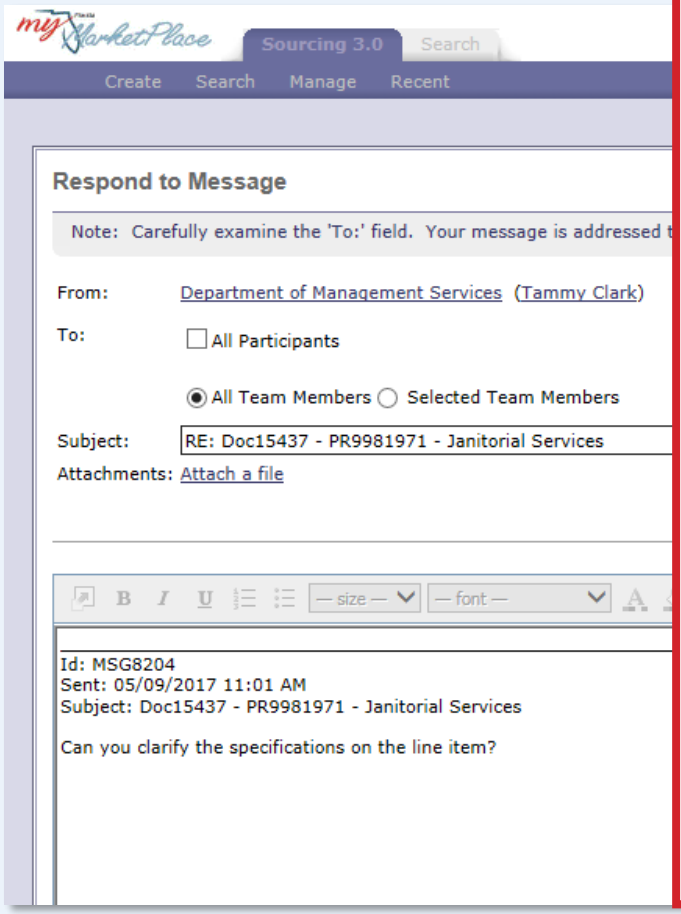
- The **Messages** tab is used to monitor vendor messages:
  - Project Owners and vendors exchange messages within MFMP Sourcing
  - Use the **Messages** tab to see all messages
  - Sourcing sends messages to each recipient's email address



- Unread messages display in bold
- Select *Messages* and click *View*, *Reply* or *Delete* as desired

Responding to Messages

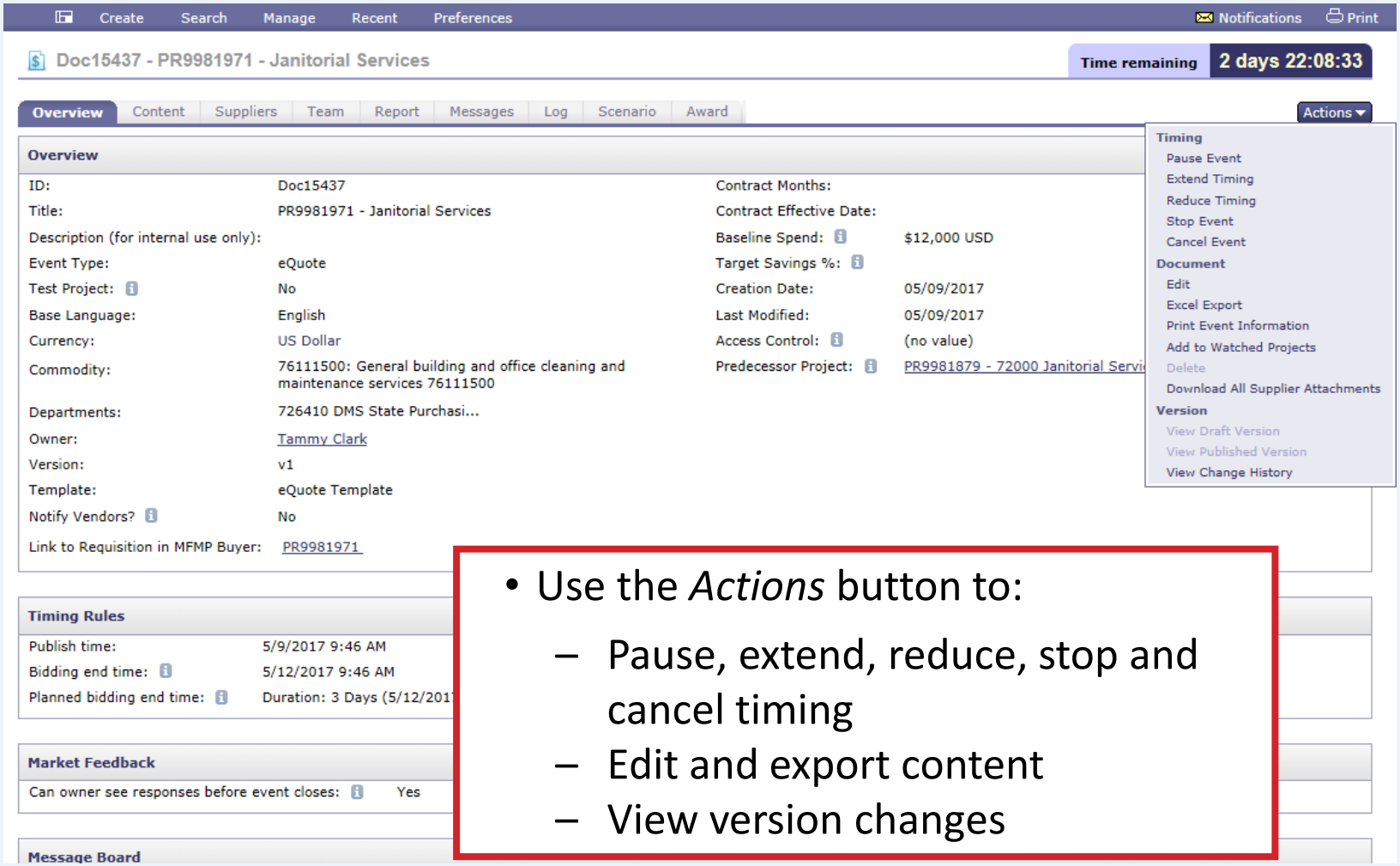
To reply to a message, from the **Message** tab, select the radio button next to the message and click *Reply.*



- Select recipients (Participants and/or Team Members)
- Update subject line. The event ID is the default prefix
- Compose your message
- Click *Send*
- When you send a message, the recipients see:
  - A pop-up in the lower right hand corner of their browser windows if they are logged into MFMP Sourcing
  - A message in their **My Messages** tab
  - And they will receive an email, based on the main contact email addresses in their vendor registration profiles

Editing eQuotes

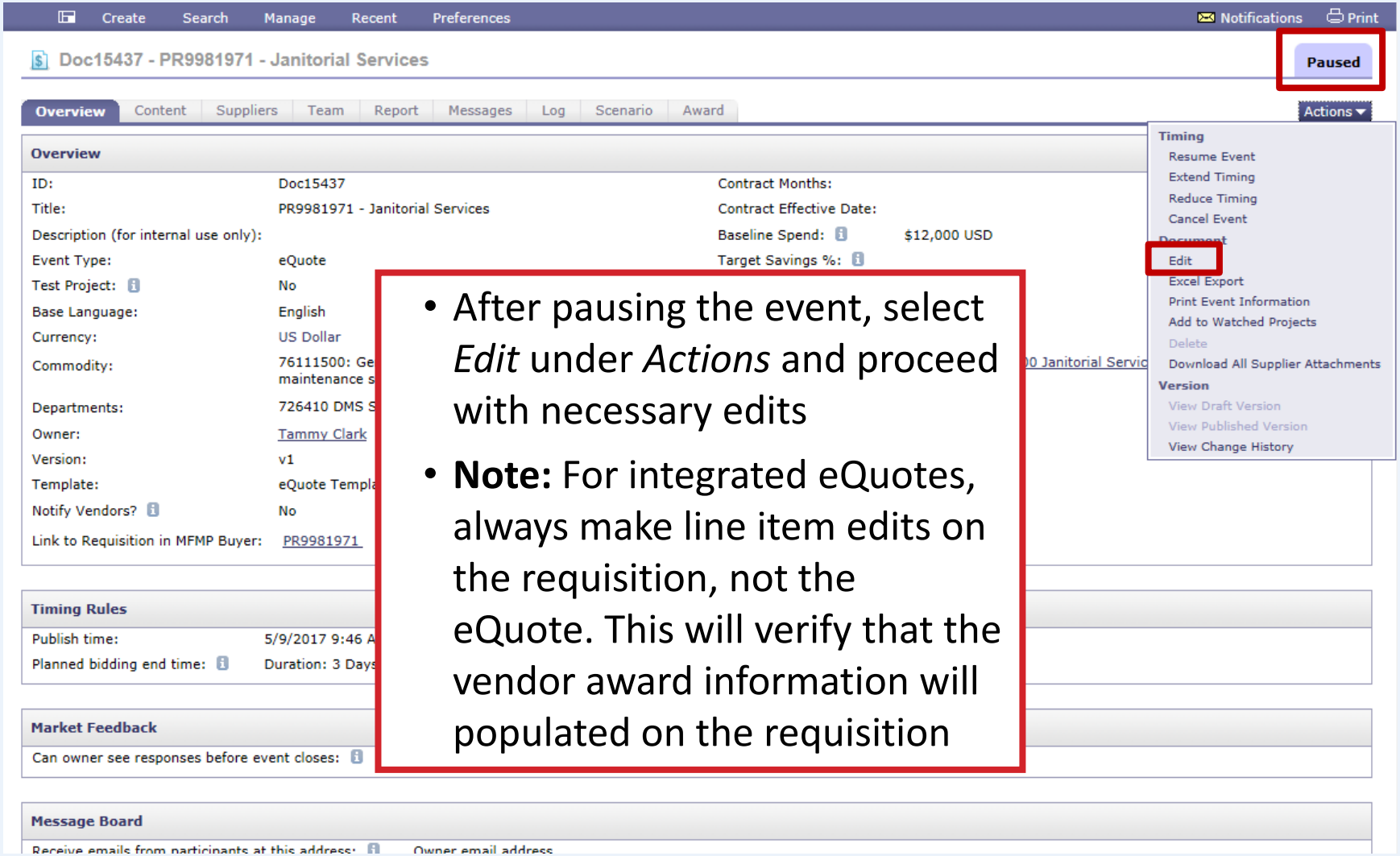
Use the *Actions* button to edit and manage the event.



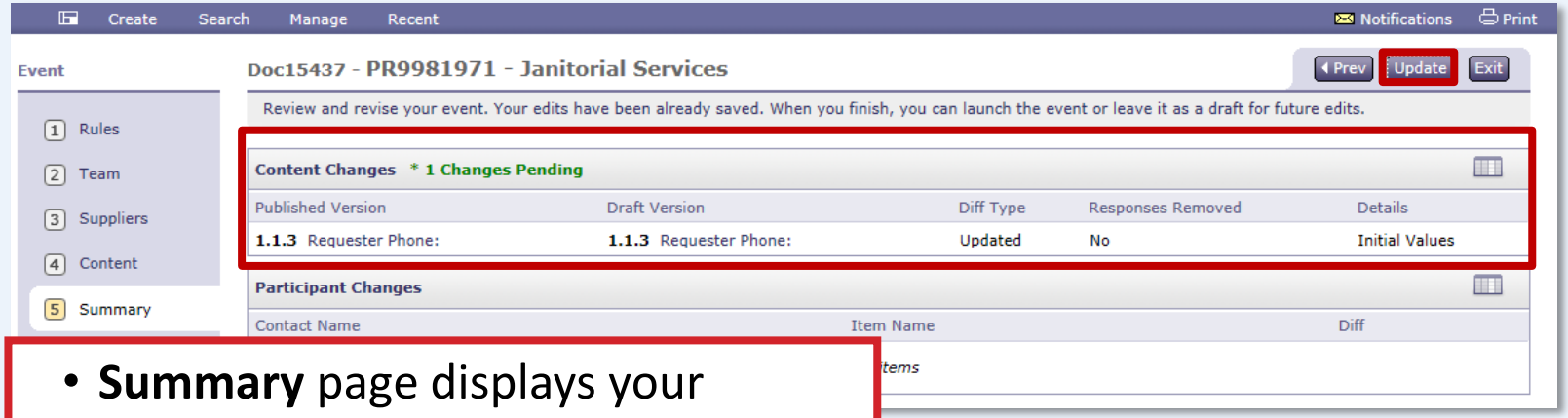
- Use the *Actions* button to:
  - Pause, extend, reduce, stop and cancel timing
  - Edit and export content
  - View version changes

Editing an Event

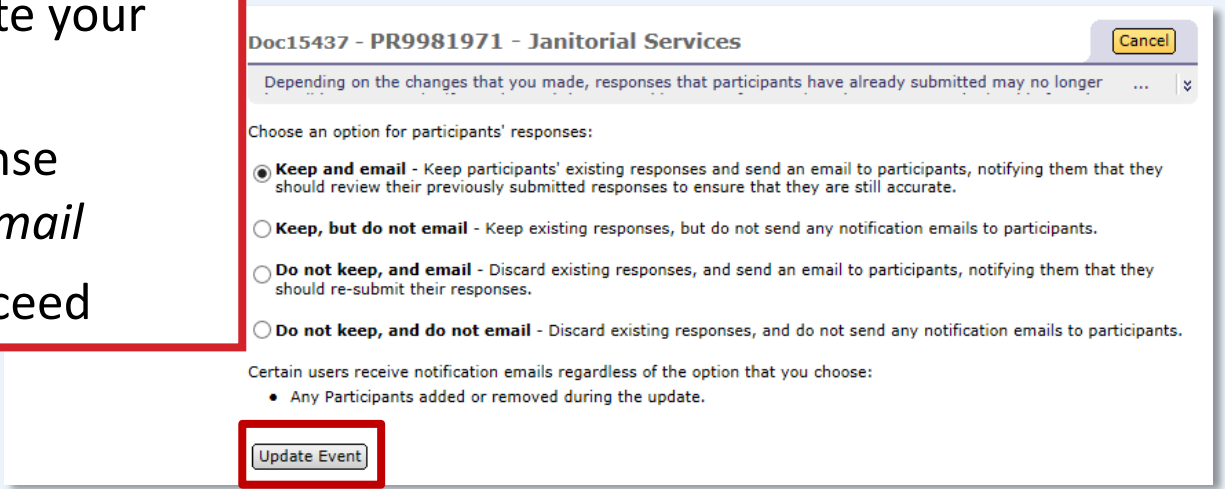
Always pause an event before edits are made.



Update the event and select how or if you want to notify vendors about changes.

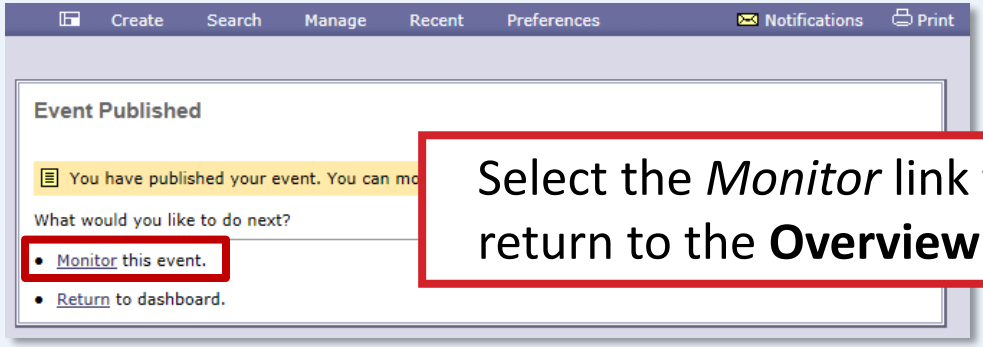


- **Summary** page displays your pending changes
- Click *Update* to incorporate your changes into the event
- Default participant response selection is to *Keep and email*
- Click *Update Event* to proceed

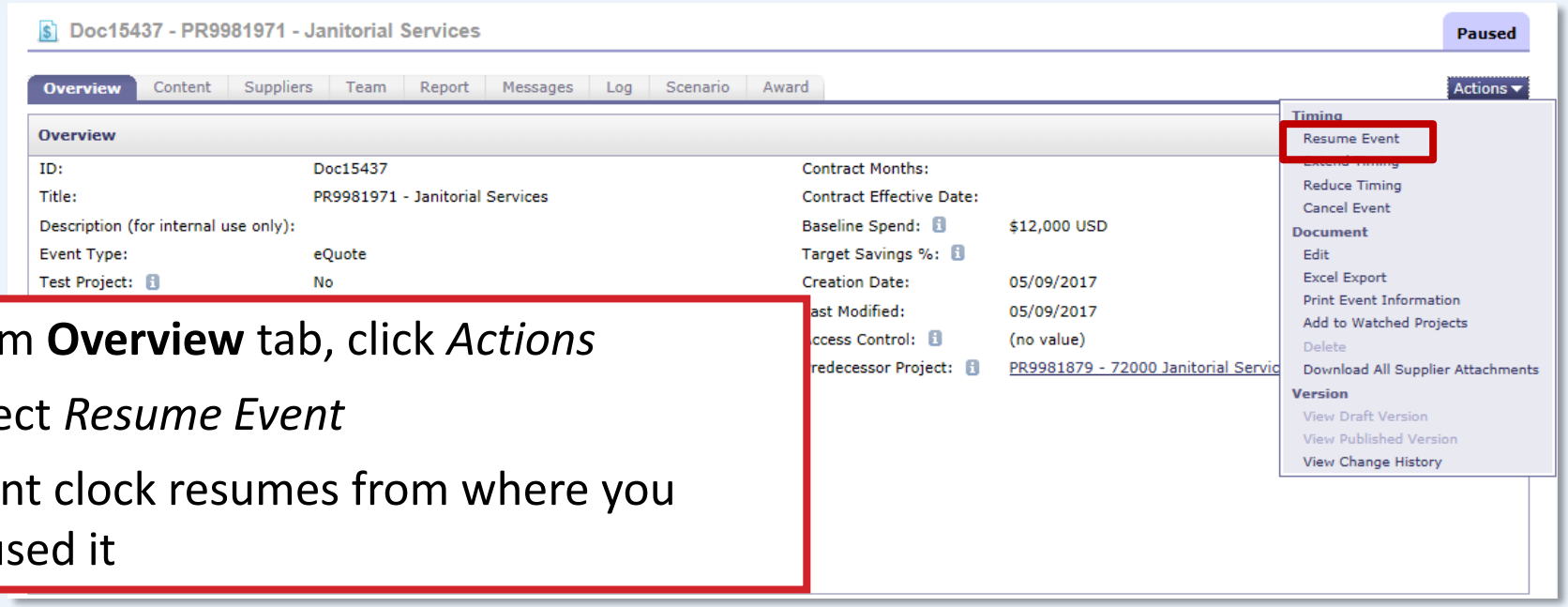


Managing eQuotes

Confirm the that the event has been updated and then resume the event.



Select the *Monitor* link to return to the **Overview** tab.



- From **Overview** tab, click *Actions*
- Select *Resume Event*
- Event clock resumes from where you paused it

Demonstration

I will now demonstrate how to manage an integrated eQuote in the MFMP Sourcing Training Environment.

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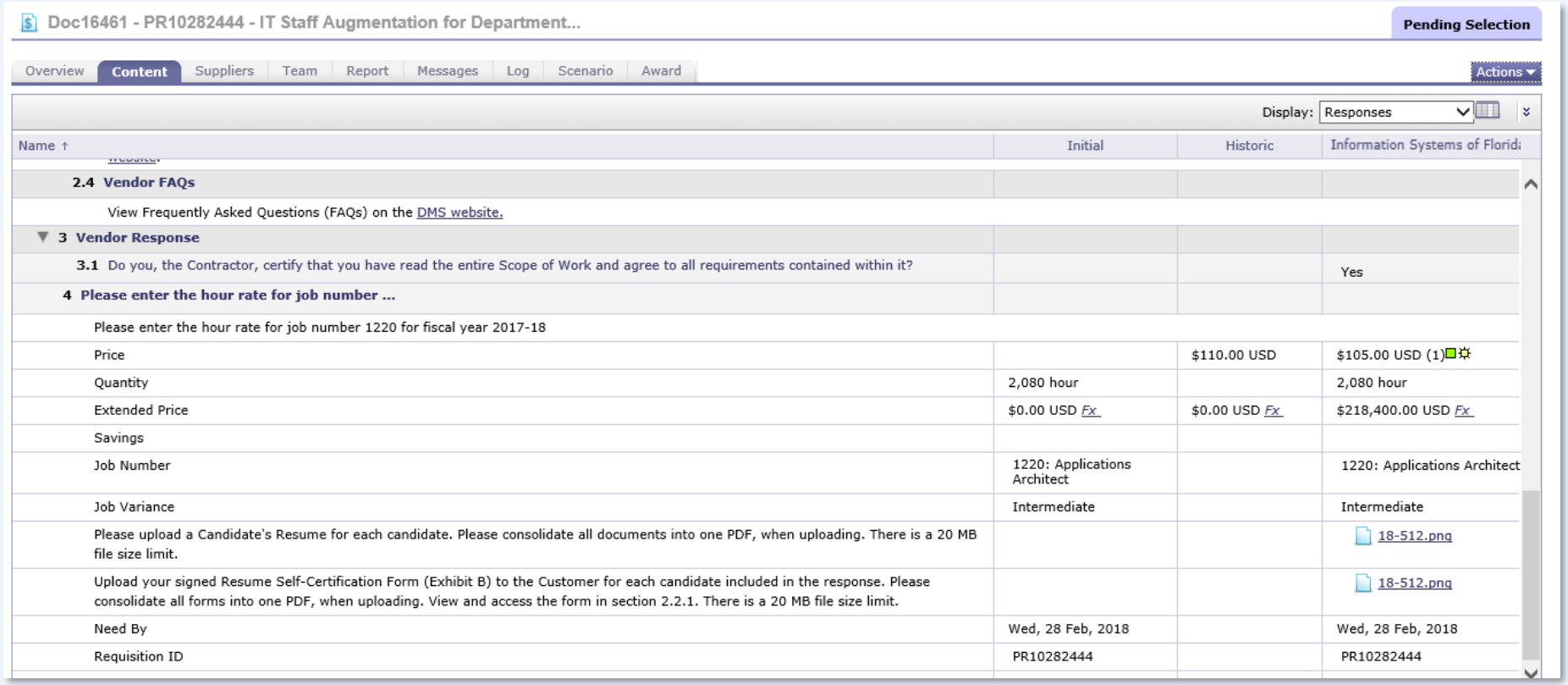
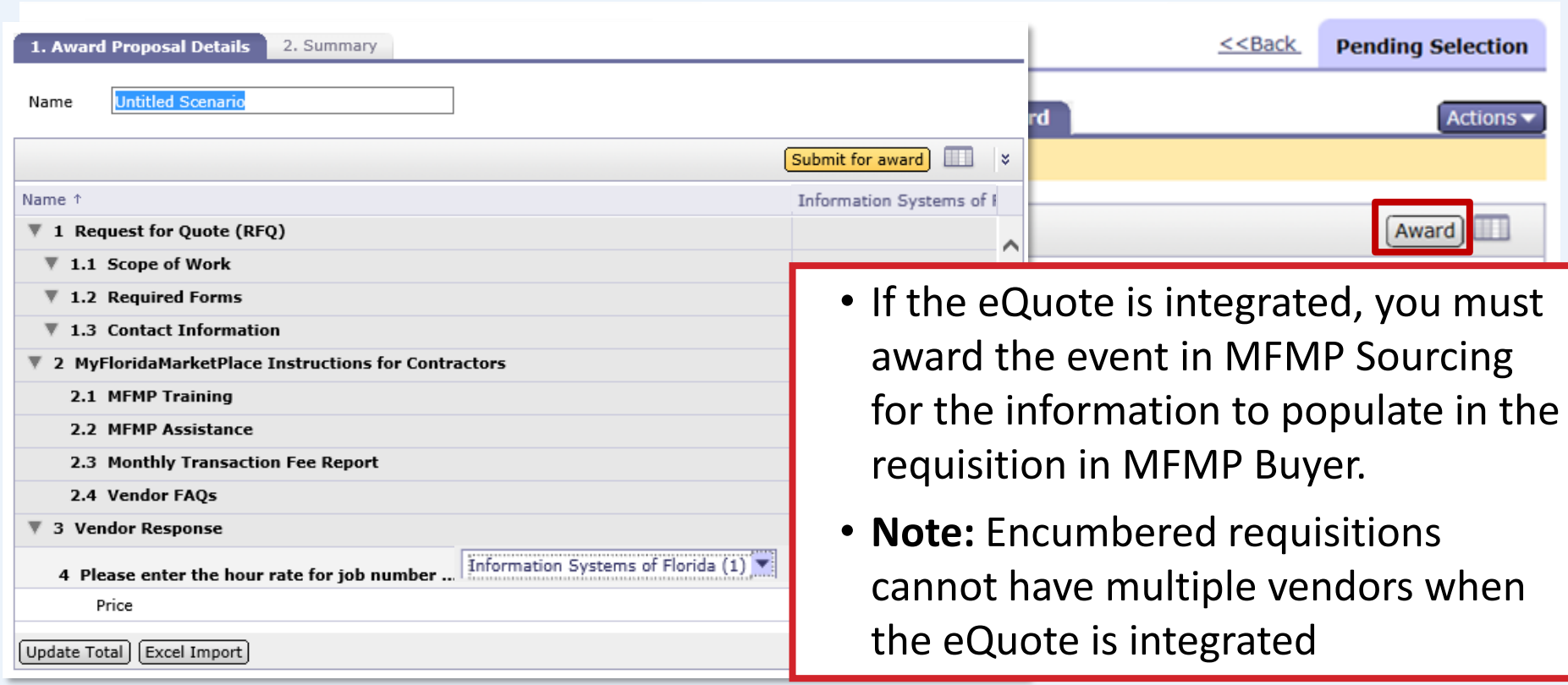
Reviewing Vendor Responses

- Review vendor responses in the **Content** tab
  - Yellow star icons indicate lowest price offered



Awarding the eQuote

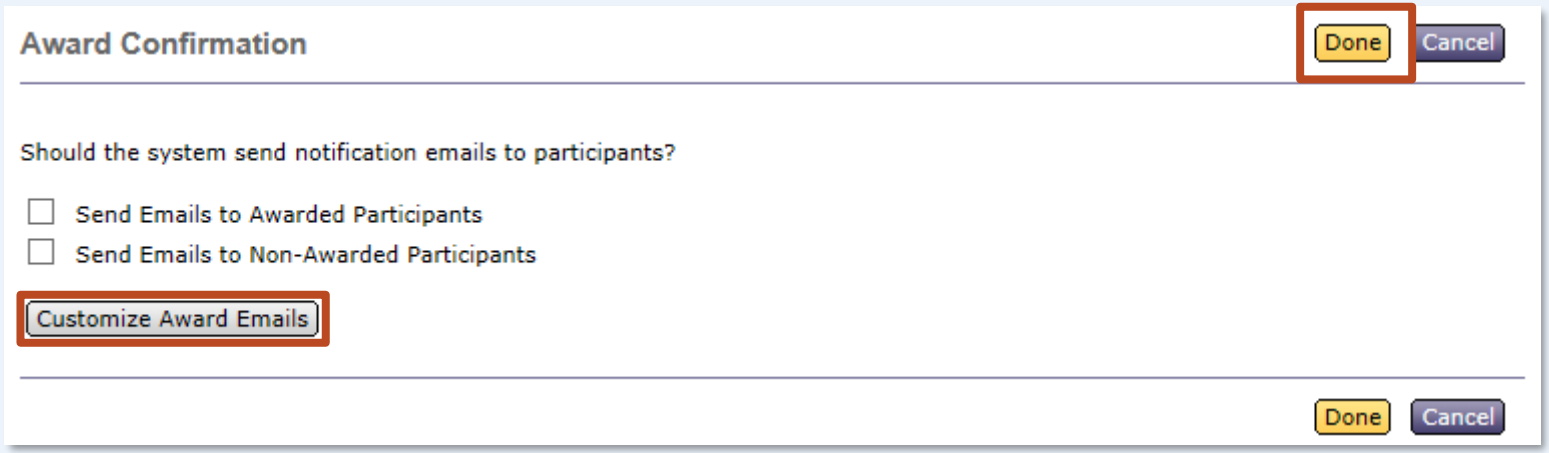
- To award an eQuote, select the **Award** tab and click *Award*
- Use the drop-down menu for each item to select the awarded vendor(s)
- Click *Submit for award*



- If the eQuote is integrated, you must award the event in MFMP Sourcing for the information to populate in the requisition in MFMP Buyer.
- **Note:** Encumbered requisitions cannot have multiple vendors when the eQuote is integrated

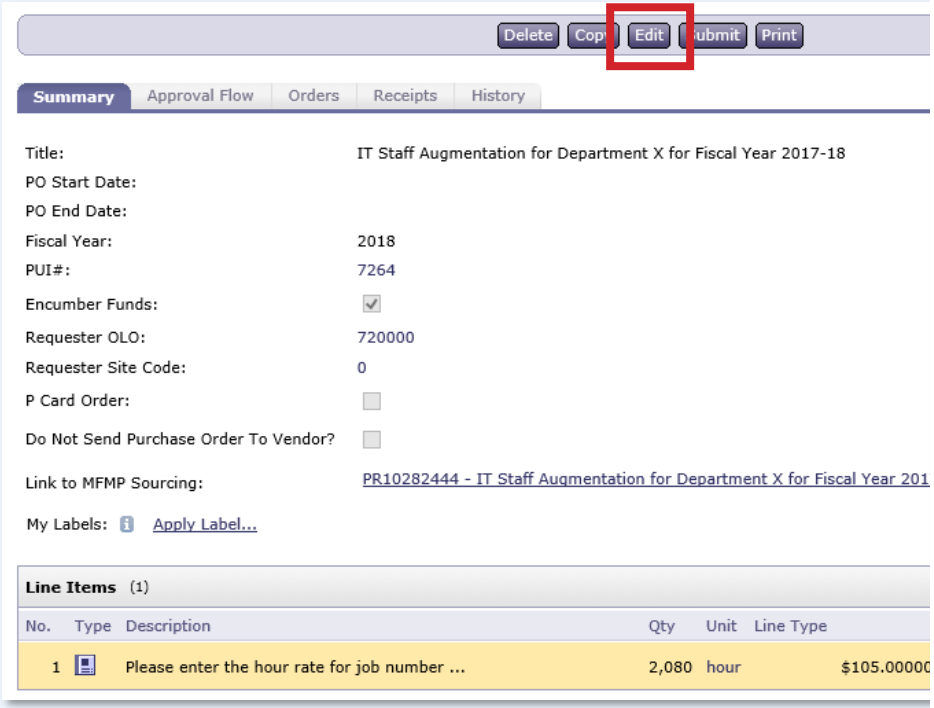
Notifying Participants

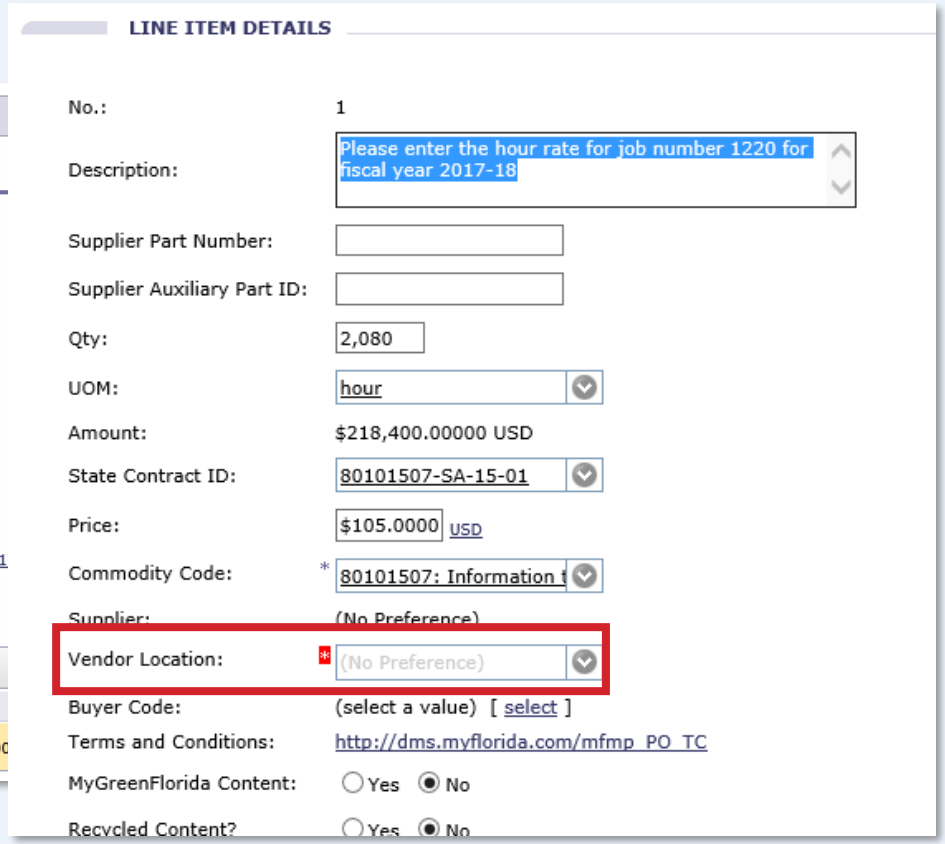
- Notifying participants on the **Award Confirmation** page is optional
  - Click *Customize Award Emails* to tailor email messages to the awarded and/or non-awarded vendors
  - When customizing the messages, keep the bracketed information unchanged
- Click *Done* to complete the award process and send the award information to the requisition in MFMP Buyer



Completing the Requisition

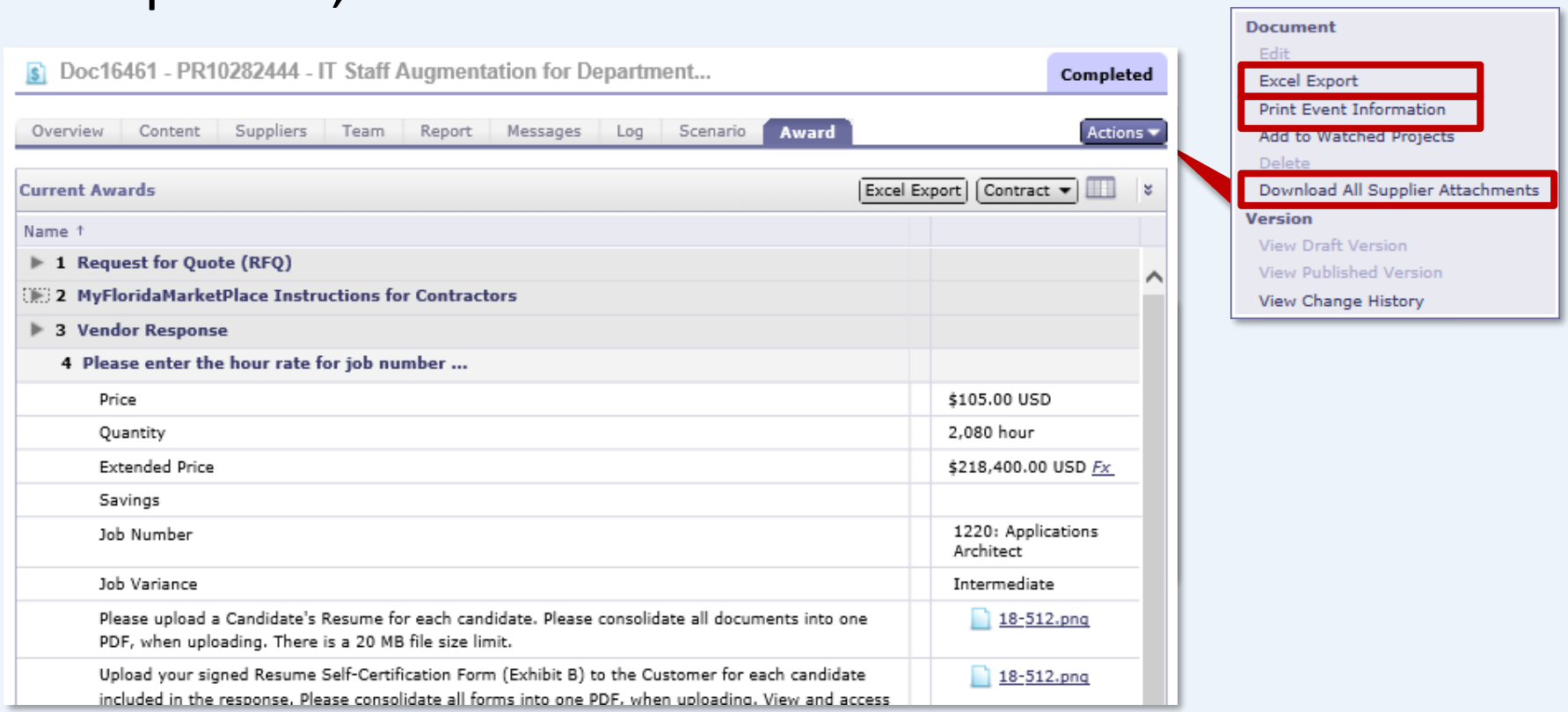
- Open the requisition and click *Edit*
- Edit the line item(s) and select the awarded vendor location in the *Vendor Location* field
- Submit the requisition





Exporting Content

- From the **Award** tab, click *Excel Export* to download the results of the items and vendor(s) you selected
- From any tab, click *Actions* to export the vendors' responses, attachments and the event information



Demonstration

I will now demonstrate awarding an event in the MFMP Sourcing Training Environment.

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Recap

- Use the same username and password in MFMP Sourcing as you use in MFMP Buyer
- Select **MOP B** for IT staff augmentation services
- Select **80101507-SA-15-01** as the contract number to use the eQuote template and auto-populate vendors
- Add **at least 3** additional vendors to the five that were auto-populated
- Edit line items on integrated eQuotes in MFMP Buyer
- Always award or close your eQuotes in MFMP Sourcing

Training

- MyFloridaMarketPlace recommends that:
  - Agency eQuote customers work in the MFMP Buyer and MFMP Sourcing training environments to apply the knowledge gained from this training
  - Agency customers should encourage their vendors to visit the MFMP for Vendor website to access vendor-related information and trainings
- Additional resources can be found on the following websites:
  - MyFloridaMarketPlace
  - Information Technology Staff Augmentation Services contract
  - MyFloridaMarketPlace **Buyer** training environment
  - MyFloridaMarketPlace **Sourcing** training environment

Contact the MFMP Customer Service Desk:

Phone: 866-352-3776

Email: BuyerHelp@MyFloridaMarketPlace.com

Hours: Monday – Friday, 8:00 a.m. – 6:00 p.m., Eastern Time