HOW TO...

See screenshots at the end of this document for additional information.

A. CREATE A NEW QUOTE

1. Navigate to PM Tools > Contract Management > Quotes
2. Click the ‘New’ button in the register view toolbar.
3. Populate required fields.
   a. Title
   b. Procuring Office: Not required to save in Draft but is required to workflow to Issued.
4. Click on the ‘Line Items’ page.
5. Click ‘Add’ in the table toolbar and populate the following fields. Add additional lines as needed.
   a. Line Number
   b. Quote Line Item List Description
   c. Quantity
   d. Unit prices as appropriate. ePM will multiply each of the unit prices entered (Labor, Material, Equipment, Subcontract, and Other) by the quantity to calculate the Line Item Total.
6. Click ‘Save’

B. ISSUE A QUOTE

1. Navigate to PM Tools > Contract Management > Quotes
2. In the register view, click on the row of the Quote to be issued. Use one of the following methods to help find the Quote document.
   a. Change to the appropriate view. See QRG #03 for more information about register views.
   b. Use the filter field to search for key words.
   c. Page forward or backward as needed.
3. With the Quote document open, click ‘Workflow’ in the toolbar then click ‘Issue Quote’.
4. Complete to following fields in the workflow dialog box as needed.
   a. To: Click on the magnifying glass icon to add ePM users on the project. Names in this field will be given an action item to review the Quote document.
   b. Cc: Click on the magnifying glass icon to add ePM users on the project. Names in this field will be notified about the Quote as an FYI.
   c. Custom Message
   d. Priority
   e. Due Date
5. Click ‘Execute’
6. From the workflow confirmation pop-up, click either ‘Return to Document’ or ‘Return to Register’ as appropriate.
C. REVIEW A QUOTE

1. Click on the link sent via email or navigate to Notices > My Notices > Received and click on the appropriate notice.
2. After reviewing the Quote, click ‘Workflow’ in the toolbar then click ‘Return for Review’ or ‘Complete Review’ as appropriate. Choosing ‘Return for Review’ will return the quote to the vendor to revise and re-submit.
3. Complete to following fields in the workflow dialog box as needed.
   a. To: Click on the magnifying glass icon to add ePM users on the project. Names in this field will be given an action item to revise the Quote document.
   b. Cc: Click on the magnifying glass icon to add ePM users on the project. Names in this field will be notified about the Quote as an FYI.
   c. Custom Message
   d. Priority
   e. Due Date
4. Click ‘Execute’
5. From the workflow confirmation pop-up, click either ‘Return to Document’ or ‘Return to Register’ as appropriate.

D. REVISE A QUOTE

1. Click on the link sent via email or navigate to Notices > My Notices > Received and click on the appropriate notice.
2. With the Quote document open, click ‘Edit’ in the toolbar.
3. Make changes to the fields as appropriate.
4. Click ‘Workflow’ in the toolbar then click ‘Submit Revision’.
5. Complete to following fields in the workflow dialog box as needed.
   a. To: Click on the magnifying glass icon to add ePM users on the project. Names in this field will be given an action item to review the Quote document.
   b. Cc: Click on the magnifying glass icon to add ePM users on the project. Names in this field will be notified about the Quote as an FYI.
   c. Custom Message
   d. Priority
   e. Due Date
6. Click ‘Execute’
7. From the workflow confirmation pop-up, click either ‘Return to Document’ or ‘Return to Register’ as appropriate.
WHAT IS…

The ePM Quote document allows a vendor to submit either requested or unsolicited quotes to GSA for consideration. These documents are commonly created as a result of an instruction document requesting pricing from the vendor. After submission of a quote GSA is able to request revisions to that quote if there are questions or concerns. Quotes are not committing documents therefore are not intended to provide approval or direction to the vendor.

WHO USES…

- Project Manager
- Construction Manager
- General Contractor

SCREENSHOTS
ePM Quick Reference Guide #135
Quote Creation

Submit

To: Brian Rothery
Cc: Bert Aultman; John Barch
Obj: 
Recipient Action: Submit Response
Custom Message: Please review and respond ASAP.
Priority: Urgent
Due Dates: 22-Sep-2016

Confirmation

ACTION COMPLETE

DISTRIBUTION RESULTS

The document Request for Quote 01 has been successfully changed to the workflow state 'Issued' and has been sent to the following people:

Brian Rothery
Bert Aultman
John Barch

Return To Document  Return To Register