

Promapp URL:

<https://au.promapp.com/otago/Process/Minimode/Permalink/BPGhkQYdedZyug2eGosCs3>

OVERVIEW

This guide shows you how to request and accept a quote in Unimarket.

TABLE OF CONTENTS

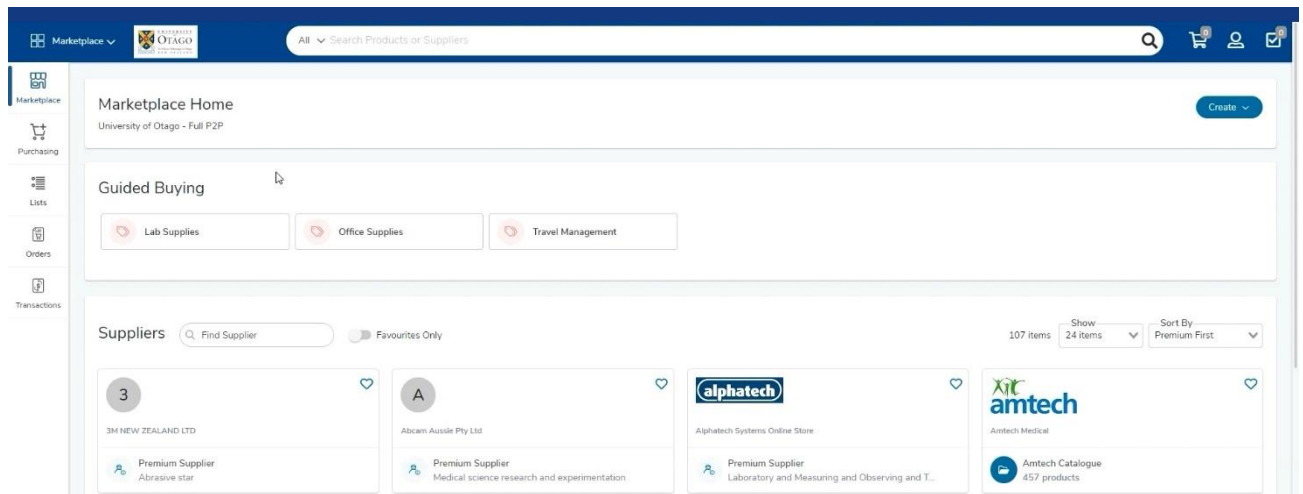
Background	1
Request A Quote.....	2
Accept A Quote.....	7

BACKGROUND

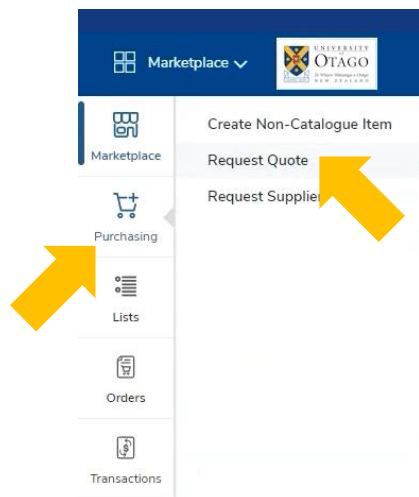
Depending on what you're buying, suppliers may not always have items you can add to your cart. Instead, you can request a quote. This is useful when you're purchasing things such as building supplies or services.

REQUEST A QUOTE

1. Begin by opening the Unimarket homepage.



2. If you need to request a quote from a supplier, click on the 'Purchasing' tab and select 'Request Quote'. You will only be able to request quotes from suppliers who are registered with Unimarket.



3. Enter a detailed name for your Request for Quote.

Request Quote

University of Otago [P2P Up...

Header
Suppliers
Attachments
Email
Confirm

RFQ Name

Wood for building project

4. Enter a description; make sure the description is clear so that the supplier or suppliers understand which product or service you are asking for.

RFQ Description
100x 2.4m pine planks 2x4


5. Add the date you'd like suppliers to send through their quotes by. To do this, click on the 'Response Date (To)' box and select a date from the calendar. You can also adjust the time if you wish.

Suppliers must respond by this date.

Response Date (To) 5:00 PM

Dec 2022

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31



6. You can set an automatic reminder by clicking on the reminder box and choosing a date. This will send suppliers an email notification reminding them of your request.

Suppliers will be sent a reminder on this date.

Reminder Date 19/12/2022 12:00 PM


7. The 'Contact Name' defaults to your own name and email address. Change these if required.

Contact Name
Thomas Trout

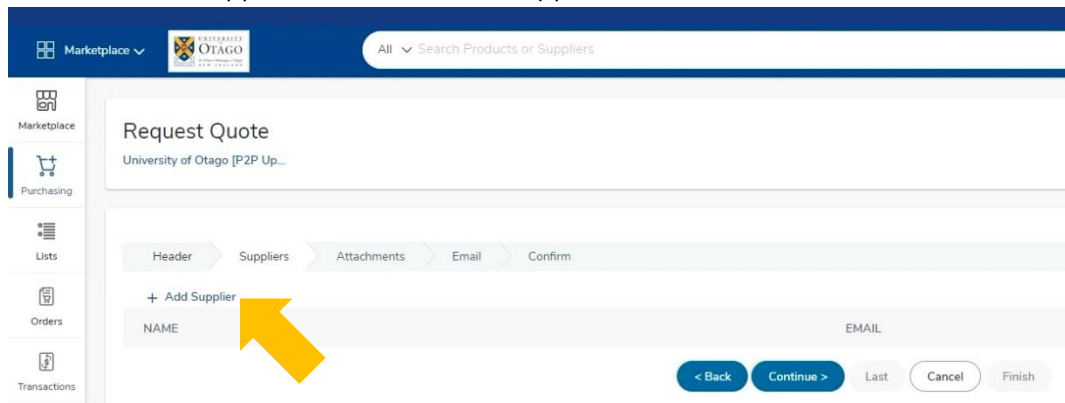
Contact Email
uat-training@otago.ac.nz

8. When you're done, click 'Continue'.

Continue >

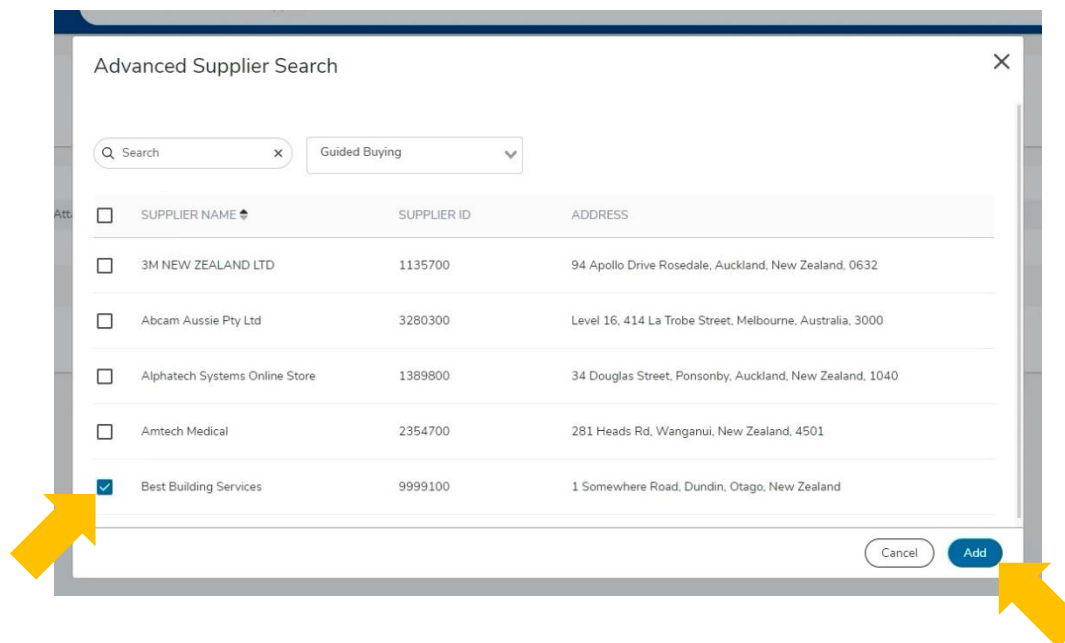


9. You can add one or more suppliers you'd like to request a quote from. To add suppliers, click on '+ Add Supplier'.

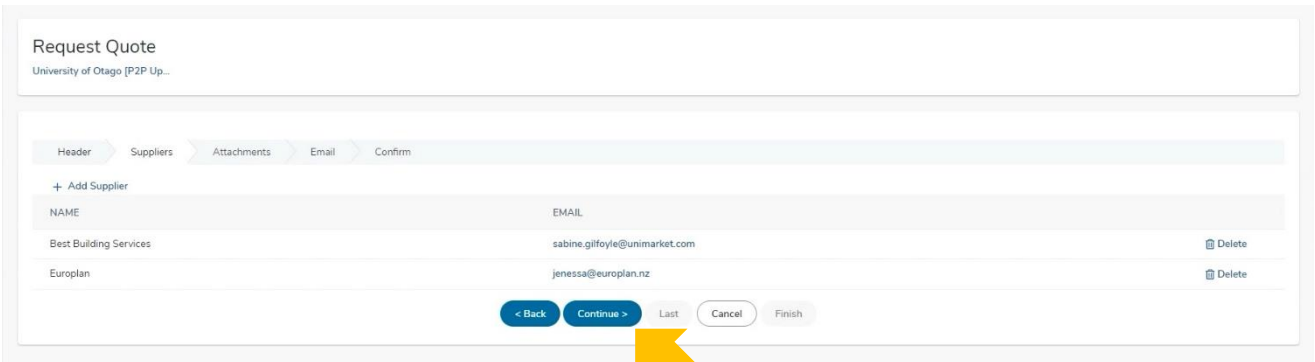


Note: As per University policy, you are required to obtain multiple quotes - preferably from at least 3 different suppliers where possible - unless you are requesting a quote for an item under contract with a specific supplier, in which case a single quote is sufficient. For advice about contracted suppliers, please consult the University's approved suppliers list, or talk to your local Supply Chain hub, or the Procurement Office.

10. Either scroll through the available list of suppliers or use the search function to search for a supplier. Tick the box next to the supplier's name for any suppliers you'd like to include, then click 'add'.



11. Check that you have added all required suppliers, and then click 'Continue'.



Request Quote
University of Otago [P2P Up...]

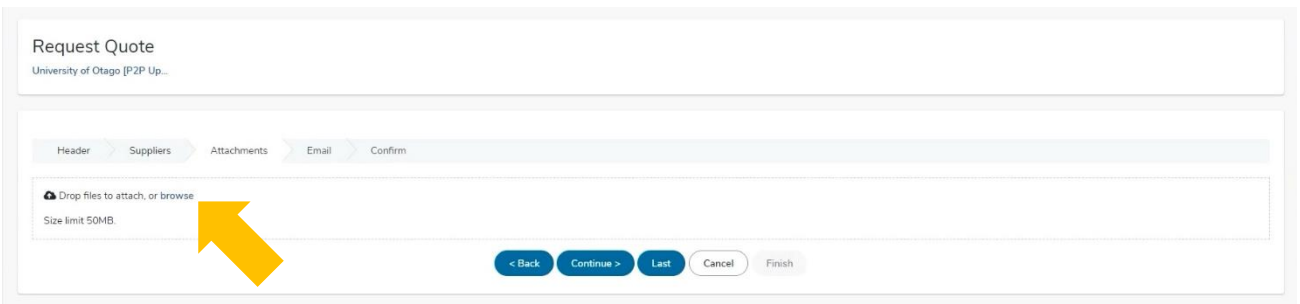
Header > Suppliers > Attachments > Email > Confirm

+ Add Supplier

NAME	EMAIL	
Best Building Services	sabine.gilfoyle@unimarket.com	Delete
Europlan	jenessa@europlan.nz	Delete

< Back Continue > Last Cancel Finish

12. Add any attachments you wish by dragging and dropping the files onto this page. Or click 'browse' to find the documents on your computer.



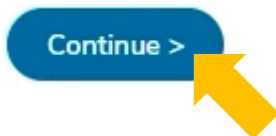
Request Quote
University of Otago [P2P Up...]

Header > Suppliers > Attachments > Email > Confirm

Drop files to attach, or browse
Size limit 50MB.

< Back Continue > Last Cancel Finish

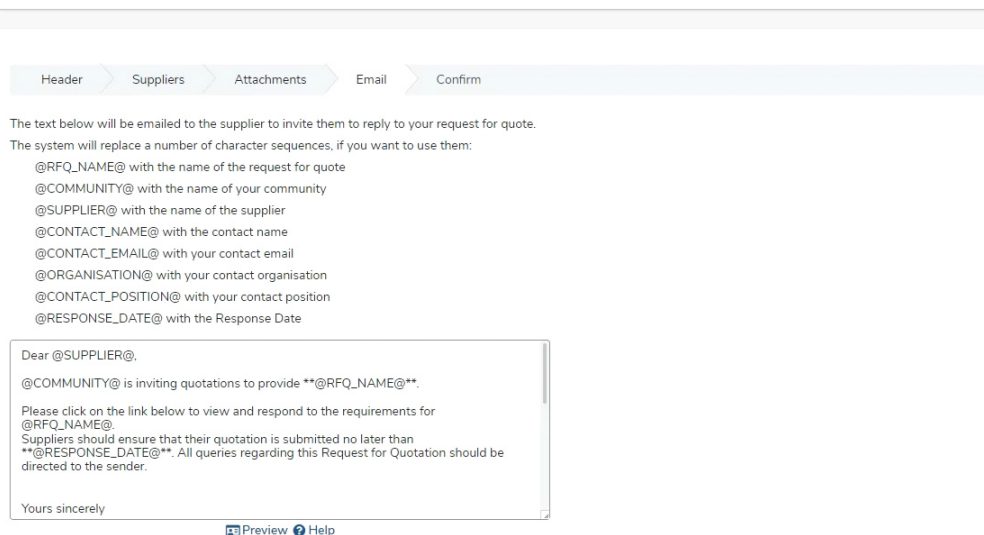
13. Click 'Continue' when you're done.



14. On the screen you will see the email that will be sent to the suppliers. Each of the @-----@ text fields will populate with the details you provided in previous steps. Avoid making edits to the email template. Click 'Continue'.

Request Quote

University of Otago [P2P Up...



The text below will be emailed to the supplier to invite them to reply to your request for quote. The system will replace a number of character sequences, if you want to use them:

- @RFQ_NAME@ with the name of the request for quote
- @COMMUNITY@ with the name of your community
- @SUPPLIER@ with the name of the supplier
- @CONTACT_NAME@ with the contact name
- @CONTACT_EMAIL@ with your contact email
- @ORGANISATION@ with your contact organisation
- @CONTACT_POSITION@ with your contact position
- @RESPONSE_DATE@ with the Response Date

Dear @SUPPLIER@,
@COMMUNITY@ is inviting quotations to provide **@RFQ_NAME@**.

Please click on the link below to view and respond to the requirements for @RFQ_NAME@.
Suppliers should ensure that their quotation is submitted no later than **@RESPONSE_DATE@**. All queries regarding this Request for Quotation should be directed to the sender.

Yours sincerely

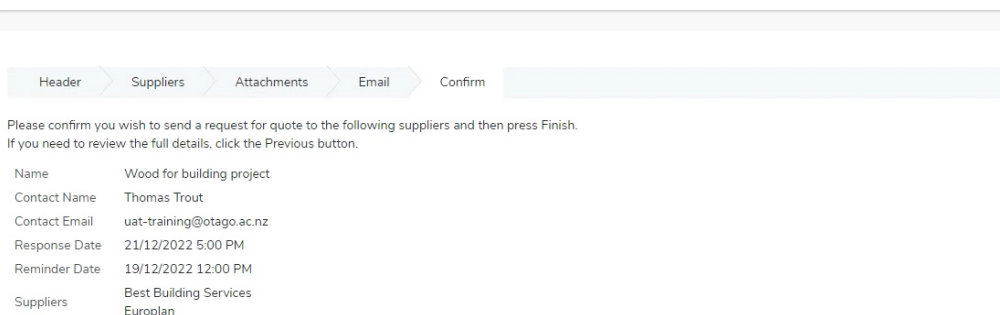
[Preview](#) [Help](#)



15. Now you can see the details of your quote. When you are happy with it, click 'Finish' to submit it to the suppliers you have selected.

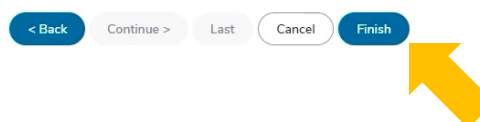
Request Quote

University of Otago [P2P Up...



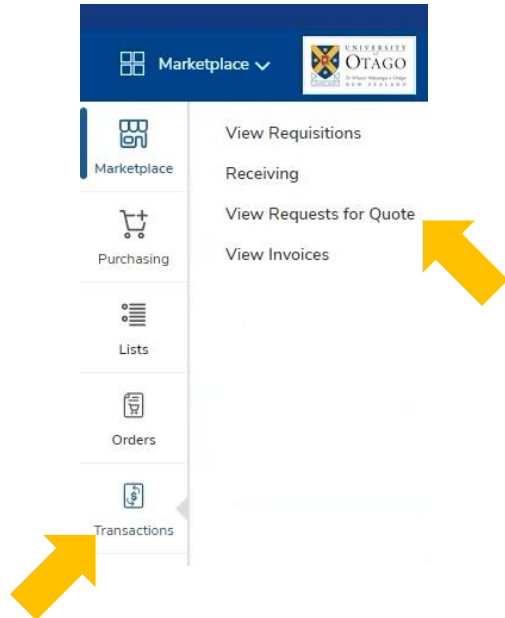
Please confirm you wish to send a request for quote to the following suppliers and then press Finish. If you need to review the full details, click the Previous button.

Name	Wood for building project
Contact Name	Thomas Trout
Contact Email	uat-training@otago.ac.nz
Response Date	21/12/2022 5:00 PM
Reminder Date	19/12/2022 12:00 PM
Suppliers	Best Building Services Europlan



ACCEPT A QUOTE

- As suppliers respond to your request for quote through Unimarket, you can view them by clicking 'Transactions' on the left side menu and selecting 'View Requests For Quote'.



- Here, you can view the status of any quotes you have requested. To view a quote, click on the relevant RFQ name.

Requests for Quote Create

RFQ ID Period: Last 90 Days x Filters

RFQ NAME	RFQ ID	USER	CREATED DATE	RESPONSE DATE	STATE	ACCEPTED	DECLINED	WAITING
Wood for building project	UniOtago-RFQ00303	Thomas Trout	14/12/2022 10:18 AM	21/12/2022 5:00 PM	Issued	1	0	1
Office outfitting	UniOtago-RFQ00020	Thomas Trout	3/10/2022 4:34 PM	10/10/2022 5:00 PM	Responded	0	1	0


- Any quotes provided by suppliers will appear here. Click 'view' to see the supplier's quote.

RFQ Wood for building project More Actions

Header		Attachments				
SUPPLIER	EMAIL	STATE	PRICE	EXPIRY DATE	QUOTE NAME	
Best Building Services	sabine.gilfoyle@unimarket.com	Quoted	\$3,150.00	21/12/2023 12:00 AM	Wood for building project	View
Europlan	jenessa@europlan.nz	New				

4. If you're happy with the quote, add it to your cart by clicking 'Add To Cart'.

Quote Wood for building project
University of Otago [P2P Up... > Best Building Services]

[Add to Cart](#) 

Quote Name	Wood for building project	Published Date	14/12/2022 10:25 AM	Items	Supplier	Buyer
Quote Reference		Expiry Date	21/12/2023 12:00 AM		Best Building Manager	bestbuilder@bestbuildingservices...
State	Accepted	RFQ	Wood for building project		Best Building Services	
Attachments	Quote For Building Project - Best Building Serv...pdf					


Item	Quantity	Unit Price	Subtotal	Tax	Requisition	Order
2.4m pine planks 2x4						
Description Pine planks as requested	100	\$31.50 / Each	\$3,150.00	\$0.00		
Category Building and Facility Construction and Maintenance Services						
		Subtotal	\$3,150.00			
		Tax	\$0.00			
		Total	\$3,150.00			

5. The shopping cart page will now have opened. Review the items and quantity of each – you can click to edit the quantity or click the rubbish bin icon to remove any items.

Shopping Cart

Best Building Services

[+ Add to Shopping List](#) [Clear Shopping Cart](#)

PRODUCT	QUANTITY	PRICE	SUBTOTAL	
<input checked="" type="checkbox"/>  2.4m pine planks 2x4 Pine planks as requested	100	\$31.50 / Each	\$3,150.00	Remove Details

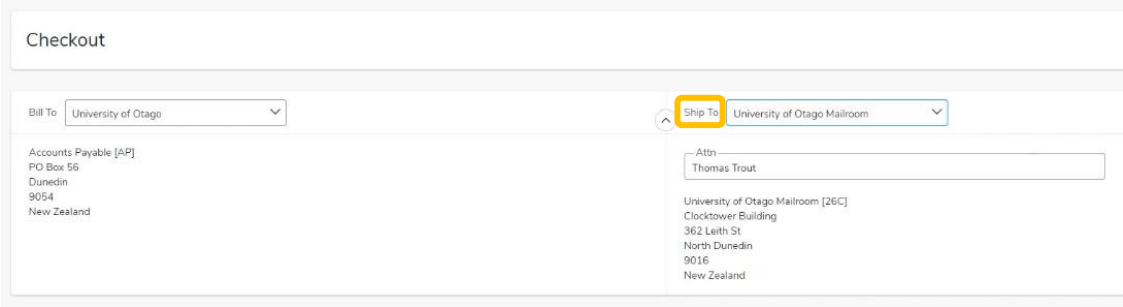
Supplier Total: \$3,150.00
[Checkout](#)

Note: If you have items from multiple suppliers in your cart, you will have to check out your items for each supplier separately.

6. Once you're satisfied, click the 'checkout' button.



7. Check that the 'Ship To' address is correct. Click on the dropdown menu to select a new option if required. You can also drop down the Organisation and Order Type menus to check the details of these.



Checkout

Bill To: University of Otago

Ship To: University of Otago Mailroom


Accounts Payable [AP]
PO Box 56
Dunedin
9054
New Zealand

Attn: Thomas Trout

University of Otago Mailroom [26C]
Clocktower Building
362 Leith St
North Dunedin
9016
New Zealand

8. A delivery date box appears next to each item – this can be left blank unless you require a specific delivery date.

Best Building Services Add notes

PRODUCT	UNIT PRICE	QTY.	SUBTOTAL	TAX
 2.4m pine planks 2x4 Delivery date: 12:00 PM	\$31.50 / Each	100	\$3,150.00	\$0.00

Remove

9. Change the account, if you need to, by clicking on the dropdown menu and selecting a new one.

Account: General Ledger

Entity: 10 — Cost Centre — Activity Centre — Dissection — Subdissection

General Ledger


Campus Dev

Project Ledger

General Ledger

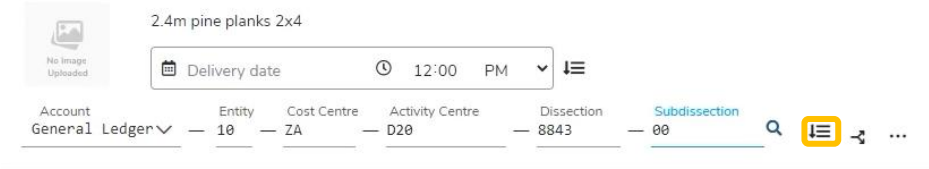
General Ledger (Extended)

PL



10. Fill in the Account Codes for the relevant department. If you don't have this information, click in the box and then click the magnifying glass icon to search for the code required. If you are unsure of which code to use, please check within your department or Supply Chain hub.

11. Once you've filled out the codes, you can copy these same values to any other items by clicking the arrow and line icon next to the codes.



2.4m pine planks 2x4

Delivery date: 12:00 PM

Account: General Ledger — Entity: 10 — Cost Centre: ZA — Activity Centre: D20 — Dissection: 8843 — Subdissection: 00

12. If you know the shipping cost, you can enter it in the 'Shipping' box, otherwise leave it blank.

Subtotal	\$3,150.00	\$0.00
Shipping	\$0.00	\$0.00
Tax	\$0.00	
Total	\$3,150.00	

13. Next, add any comments you wish in the 'Special Instructions' section. The text you enter in this field will be sent to the supplier, so it's a handy place to enter any information you want the supplier to know.

14. Under the order attachments section, upload any files you'd like to send to the supplier. Click 'browse' and upload the document from your computer.

Order attachments

You can choose which order attachments will be sent to the supplier together with the order.

 Drop files to attach, or browse

Size limit 50MB.


15. If there is information you would like to provide to the approver, to justify or explain the purchase, you can enter it into the justification text box. Anything you enter in the justification section will be seen by the approver, but not the supplier.

Upload a justification attachment if required.

Justification

ⓘ The justification and attachments are for review by the approver. They will not be sent to the supplier.

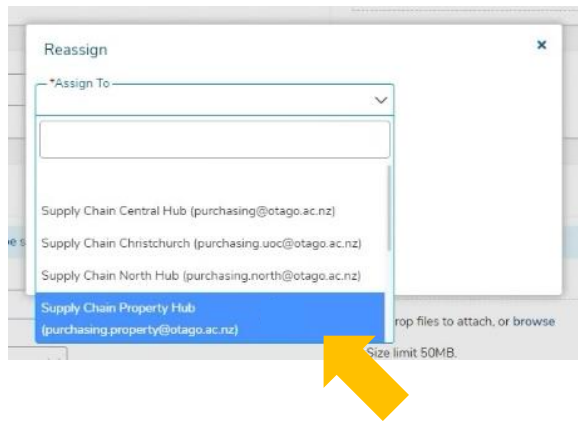
Justification Attachments

 Drop files to attach, or browse

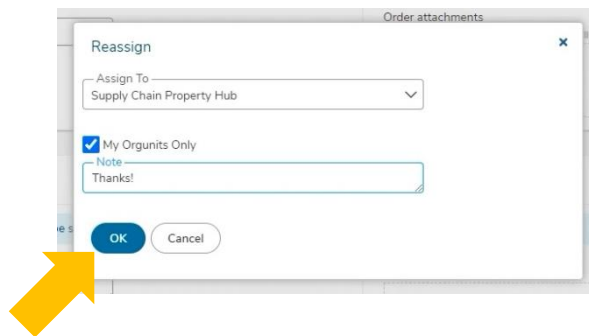
Size limit 50MB.

16. Click the reassign button to reassign to a Supply Chain hub. A pop up will appear on the screen.

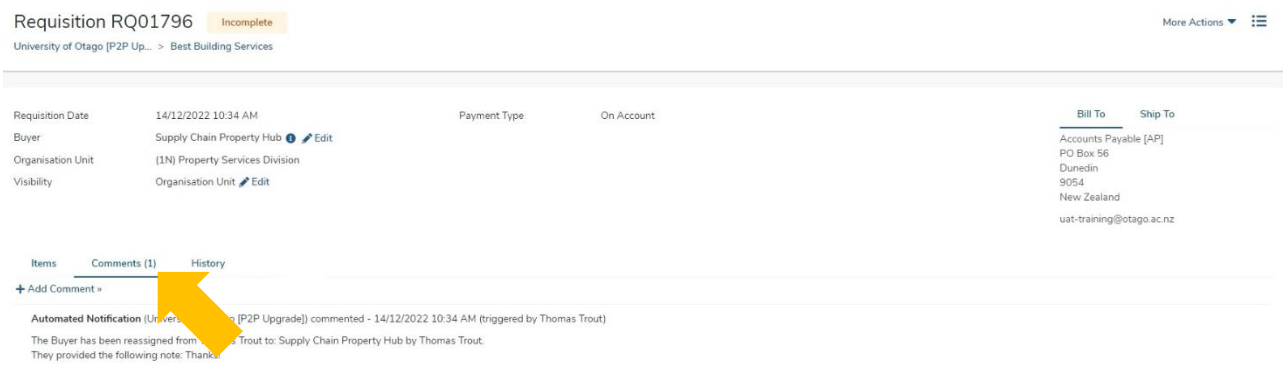
17. Click the 'Assign To' drop down to search for and select your Supply Chain Hub.



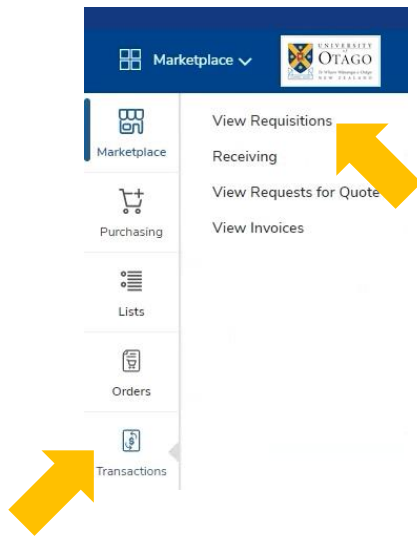
18. You must add a note before continuing. Click 'OK' when you're done.



19. After the requisition has been reassigned to a Supply Chain hub, you can click into the comments tab to add additional information about the order and to view any other comments that have been added.



20. Supply Chain will now process the requisition. You can view your requisition by clicking on 'Transactions' and then 'View Requisitions'.



21. Click into the requisition to view more information about the request. The state of 'incomplete' or 'unprocessed' means the request is with your Supply Chain hub. The state of 'Pending' means it is waiting for approval.

Requisitions

REQUISITION	BUYER	SUPPLIER	TYPE	STATE	APPROVERS	CREATED	TOTAL
RQ01796	Supply Chain Property Hub	Best Building Services	Standard	incomplete		14/12/2022 10:34 AM	\$3,150.00
RQ01792	Belinda Bass	THE STRICTLY COFFEE COMPANY 2020 LTD	Standard	Approved		13/12/2022 2:33 PM	\$115.00

22. Once the requisition has gone through the approvals process, it will show up in the 'Orders' screen.

ORDER	RECEIVING	TYPE	BUYER	REQUISITION	SUPPLIER	ORDER DATE	TOTAL
OU00884	Open	Standard	Belinda Bass	RQ01796	Best Building Services	14/12/2022 10:58 AM	\$3,150.00
OU00882	Open	Standard	Belinda Bass	RQ01792	THE STRICTLY COFFEE COMPANY 2020 LTD	13/12/2022 2:42 PM	\$100.00