*University of Tennessee*

easySourcing™ **FAQs**



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# Frequently Asked Questions for easySourcing™

## Q: There are four variations of bids that you can use, easyQuote™, easyBid™, easyDiscount™ and easyProject™. What circumstances are each of the types intended for?

A: easyBid™, orLine Item Bid, is the most structured and detailed to the granular level of the bids. Line Item Bid is a sealed event. easyQuote™ is a private price check. easyProject™ can be run as a quote or as a sealed event. In easyDiscount™, Discount bid is used for category or catalog-discount type of bids (sealed). The easyDiscount bid will not be immediately used.

## Q: What is a Walk-In Bid and how is it handled in easySourcing™?

A: A walk-in bid is a bid that is either mailed in or hand delivered to a buyer. If a vendor wishes to provide a paper bid, whether the bid is mailed or hand delivered, someone will need to enter the information into the bid system. Vendors will still need to be either fully registered or be created as a walk-in vendor to participate in the bid process.

## Q: How are the University of Tennessee vendors identified during the registration process so that they are not charged a fee?

A: There is no fee to register within the database. When the vendor receives an invitation and opens the bid, the system applies the fee rules from the bidding entity. If the entity allows fees, the system will present the appropriate message if the vendor has not paid the $95.00 fee. In your configuration, the fee has been waived so the vendor will not be presented with this message to pay.

## Q: What if two vendors have the same name such as Acme Building Products? How is this handled during the registration process?

A: Vendors can have the same name, but the tax ID number will be different. Company Name is not the unique identifier in the system.

## Q: How are RFPs handled?

A: One way to handle the RFPs is through easyQuote™ by creating two separate bid events. Otherwise, most customers handle multiple RFPs with easyProject™, by creating two separate bid events. One event is for the technical portion and the other is cost portion. Two different opening dates are established to ensure that the cost isn’t opened until the technical portion has been evaluated.

## Q: How do vendors bid on items in the Posting Board?

A: The Posting Board does not allow for bid response. Vendors must be registered in order to respond to a bid.

## Q: Do vendors have to register with ESM Solutions first before they can respond to a bid?

A: Yes, a vendor must be registered with ESM Solutions and then invited to a bid before they can respond to it except in the case of walk-in vendors.

## Q: Does a vendor need to register first before being able to view the Posting Board?

A: No, a vendor can view the Posting Board before registering, but cannot respond to a bid.

## Q: How are vendors notified that a bid is listed on the Posting Board?

A: There is no notification to the vendors that a bid has been posted on the Posting Board.

## Q: When are bids no longer visible on the Posting Board?

A: When you remove them from the Posting Board; this is a manual process.

## Q: What if a bid needs to be delayed or extended?

A: You can extend or delay a bid by extending the bid date on the Publish tab and then by re-publishing the bid.

## Q: What is the difference between Line Item Bid and Project?

A: A Line Item Bid is more detailed and down to the granular level. A Line Item bid is also a sealed bid. The Project option is more geared for construction of RFPs, and it serves as a way to electronically distribute detailed documentation. Although both solutions can allow attachments from vendors, easyProject usually includes detailed response information for review.

## Q: What is the purpose of the “Category” field?

A: The category field is used to categorize your bid. It is a text field that is visible to the vendor. You can use NIGP codes or categories such as computer supplies, janitorial supplies, etc., in the category field.

## Q: What is “Multiple Item Responses”?

A: When this box is checked on the bid header page, you allow the vendor to respond multiple times to line items. When left unchecked, the vendor can only respond to the line item once.

## Q: What is “Quote as Specified”?

A: The vendor can only respond to the line item as you requested under “Quote as Specified.” For example, if you asked for a certain type of monitor, a vendor can only respond with that particular brand of monitor.

## Q: How long does it take a vendor to be confirmed/validated by ESM Solutions?

A: It takes about 24 hours, but registrations are typically processed within 2 hours.

## Q: What does “Per Purchase Unit” mean?

A: The Per Purchase Unit is a required field that communicates a certain product to a vendor, which they must expect. The Per Purchase Unit is a multiplier of the quantity. A best practice recommendation is that you put “1” as the Per Purchase Unit.

## Q: What does “Previous Unit Price” mean?

A: The Previous Unit Price field is optional. If there is a bid price for an item that was previously awarded, you can enter it in this field. This information is not visible to the vendor. If you copy an awarded bid, this field will automatically populate the Previous Unit Price field with the previous price. This information is not shared with vendors, but serves as a benchmark for buyers.

## Q: What do “Effective Start Date” and “Effective End Date” mean?

A: The Effective Start and Effective End Dates represent the beginning or end date of the pricing of the contract. This field is not required for a bid or quote.

## Q: At the line item level of easyBid Line Item, there is a “Quantity” field listed under Size and there is a “Quantity Required” field. What is the difference?

A: The QUANTITY/EOM and package type work together to structure the specific parameters of the requirements. Once these parameters are defined, the “Quantity” field is used for listing the number of items expected to be purchased based on the buyer’s understanding. If you use the item fields (UOM/QUANTITY/PACKAGE TYPE), you have to place a value in quantity, as it is a required field.The item fields (UOM/QUANTITY/PACKAGE TYPE) are not required fields.

## Q: If a vendor needs to make a correction on a submitted bid, how is this handled?

A: Upon notification from the vendor, the buyer can return the response back to the vendor. To do this, the buyer can go to a section under the Publish Tab, called Return Response. Then, the buyer can select a bid and a screen will open, allowing the buyer to return the bid to the vendor.

## Q: What is the difference between a Standard Lot and Flex Lot?

A: A standard lot is a lot in which the vendor must respond to all the items. A flex lot is a lot in which a vendor can pick and chose which bids they will respond to.

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# Training & Support

## Q: Are there any training materials or documentation?

A: A webpage containing training videos, manuals, support resources and other easySourcing information can be found at the following web address:

<http://treasurer.tennessee.edu/purchasingsystem/sourcing/index.html>

## Q: What if I need help?

A: If you are not able to get the information you need from the University of Tennessee Market Place Training webpage, please contact **Jack Walker** at ***jwalk117@utk.edu*** or 865-974-0326, or **David Marks** at ***dmarks@tennessee.edu*** or 865-974-0326. It is helpful to provide a screenshot of the error or issue when reporting problems or requesting assistance. Jack may also be available for visits to your office or campus, if necessary.

The following information is provided as supplemental information to the topics presented, as well as basic document history.

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