

AV Quick Quote Request Process

This guide provides step-by-step instructions for submitting a Quick Quote Request and managing the associated products and services. By following these steps, you will be able to efficiently complete the process and submit your quote requests to suppliers.

Step 1: Access the Quote Request Form

On the Shopping Home Page, scroll down under "Showcases" to locate the tile labeled "A/V Contract Quote Request Form" and click on it.

Step 2: Review Instructions

This will open the Quick Quote Request Form displaying many sections on the left-hand side. First is the Instructions section. Read through the instructions and then click "Next" to proceed. (figure 1).

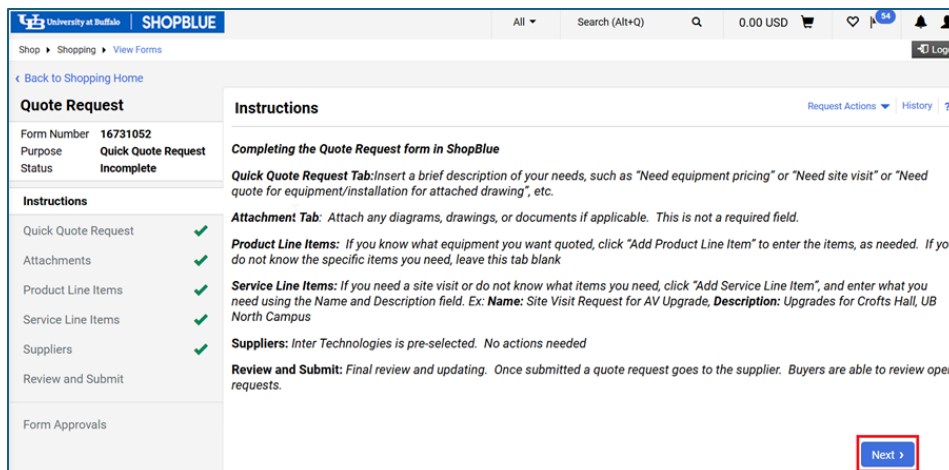


Figure 1

Step 3: Add Quote Details

In the Quick Quote Request section, add any descriptions or special instructions for the supplier regarding the quote request and click "Next." (figure 2).

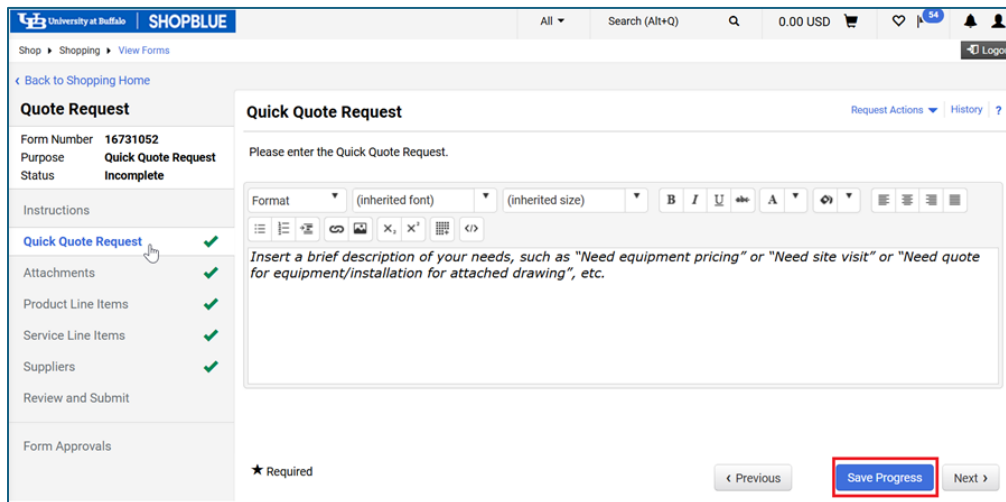


Figure 2

Step 4: Upload Attachments (Optional)

In the Attachments section, upload any diagrams, drawings or relevant documents if applicable. This is not a required field. (figure 3).

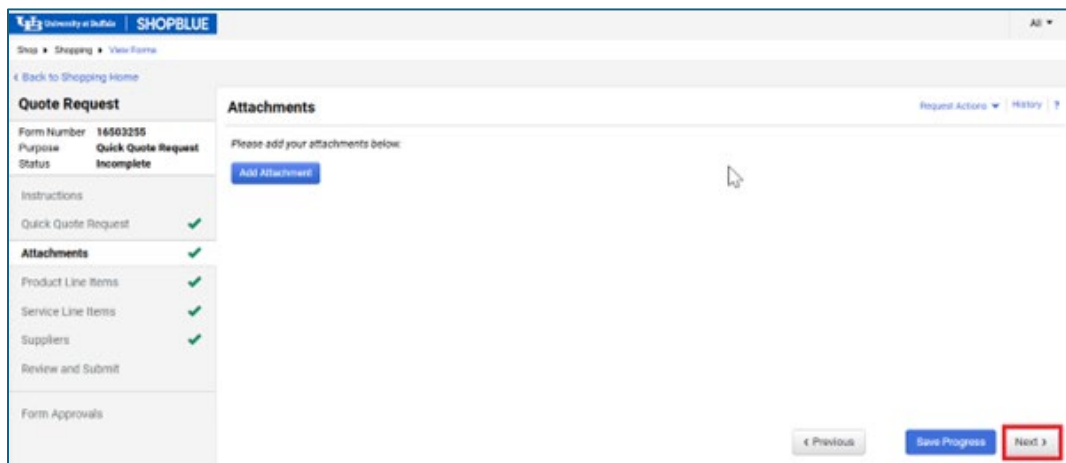


Figure 3

Step 5: Add Product Line Items (Hardware Only)

If you are reaching out for specific AV hardware and no installation or site visit is needed, you can add these on the Product Line Items Tab by clicking "Add Product Line Items." (figure 4).

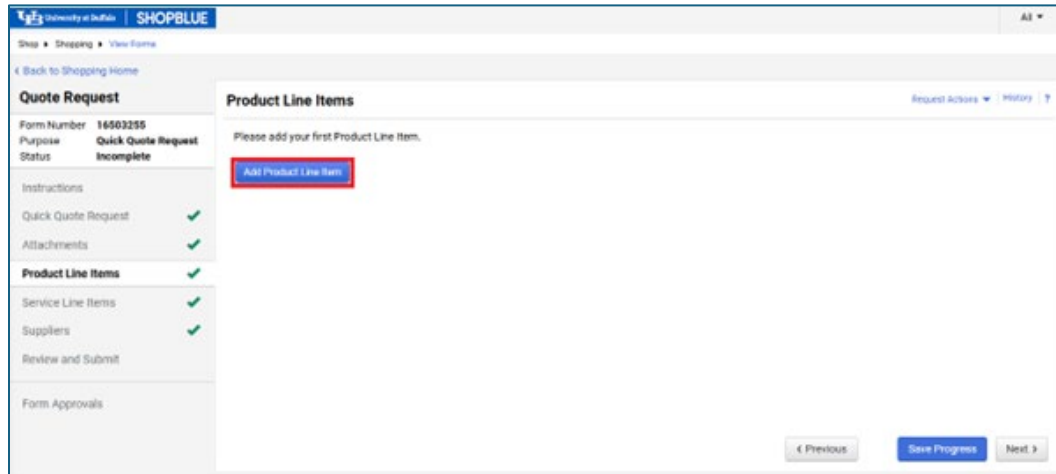


Figure 4

A dialog box will appear to enter information such as the name, quantity and other details. After entering all required details, click "Save Changes." (figure 5).

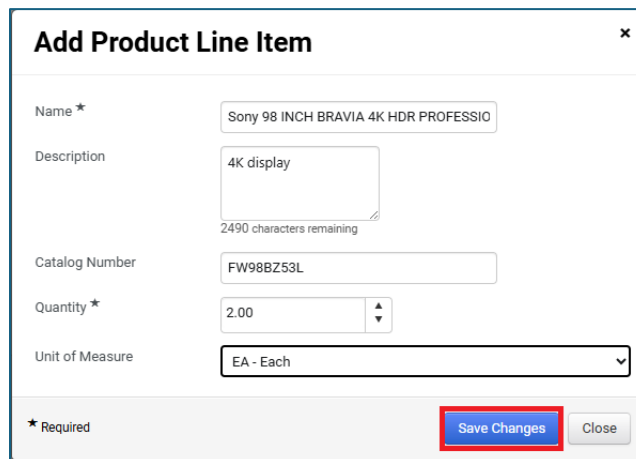


Figure 5

The added products will be displayed. Once all products have been entered, click 'Next.'

Step 6: Add Service Line Items (Site Visits)

If you need a site visit or do not know what items you need, click "Add Service Line Item" and enter what you need using the Name and Description field (figure 6).

Example: Name: Site Visit Request for AV Upgrade; Description: Upgrades for Crofts Hall, UB North Campus.

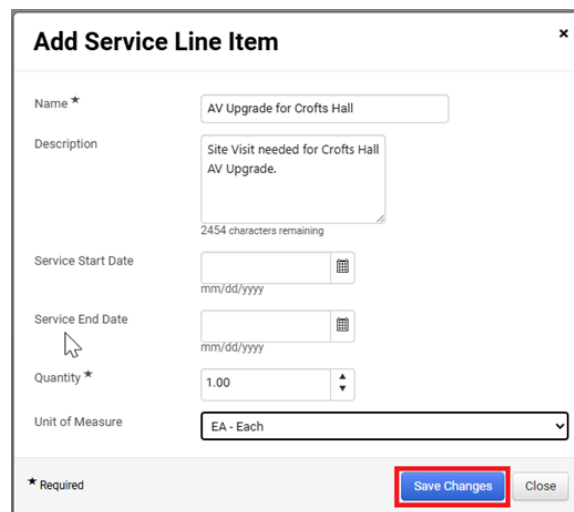


Figure 6

Step 7: Supplier Selection

The Suppliers tab has been pre-populated with Inter Technologies, and no action is required on this tab.

Step 8: Review and Submit

The green checkmarks in the Review and Submit section confirm all required fields have been filled out. If any fields are missing, they will be highlighted. After reviewing, click "Submit."

A confirmation dialog box will appear. Click "Yes" to proceed (figure 7).

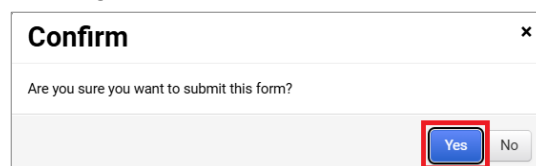
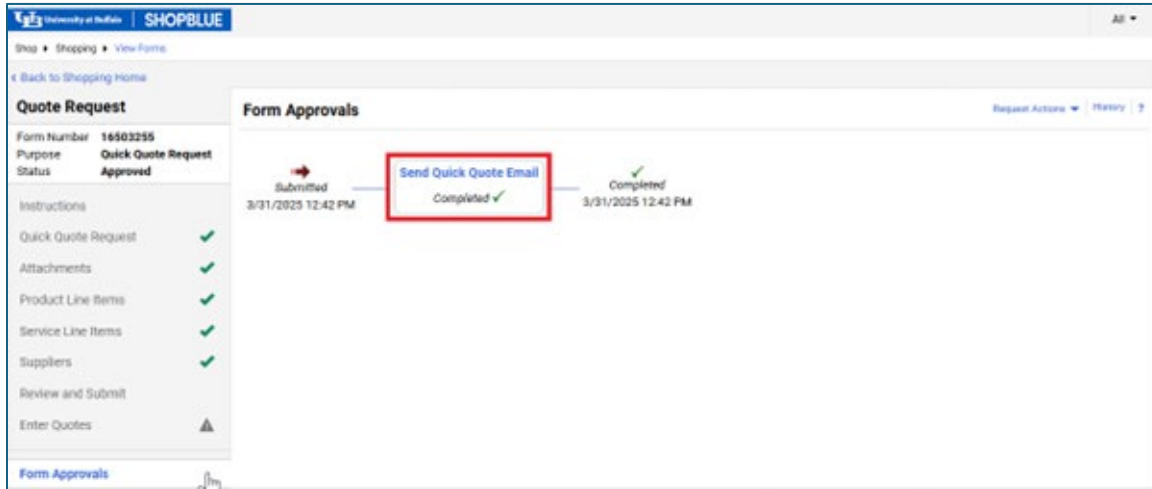


Figure 7

Step 9: Confirmation

The Form Approvals section displays the workflow process and confirms that the Quick Quote Email has been sent to the suppliers (figure 8).



The screenshot shows the 'Form Approvals' section in the SHOPBLUE system. On the left, a 'Quote Request' summary shows Form Number 16503255, Purpose Quick Quote Request, and Status Approved. Below this is a list of items with checkmarks: Quick Quote Request, Attachments, Product Line Items, Service Line Items, Suppliers, Review and Submit, and Enter Quotes. The main area displays a workflow diagram with three steps: 'Submitted' (3/31/2025 12:42 PM), 'Send Quick Quote Email' (Completed), and 'Completed' (3/31/2025 12:42 PM). The 'Send Quick Quote Email' step is highlighted with a red box.

Figure 8

You can access your Quick Quote Requests, either completed and Approved or Incomplete, on the Shopping Homepage in a section titled “My Quote Requests” (figure 9). You can use this to finish your request if it is incomplete or to access your request to begin entering your quotes

My Quote Requests				
Total Procurement Requests: 9				
Form Name ▾	Form Purpose	Form Status ▲	Created Date/Time ▾	Submitted Date ▾
Quote Request	Quick Quote Request	Approved	4/30/2025 1:02:55 PM	4/30/2025 1:03:54 PM
Quote Request	Quick Quote Request	Approved	4/1/2025 11:17:39 AM	4/1/2025 11:21:10 AM
Quote Request	Quick Quote Request	Approved	3/31/2025 12:45:47 PM	3/31/2025 12:56:48 PM
Quote Request	Quick Quote Request	Approved	3/31/2025 12:19:38 PM	3/31/2025 12:42:47 PM
Quote Request	Quick Quote Request	Incomplete	6/9/2025 9:37:11 AM	
<div> < > Page <input type="text" value="1"/> of 2 1-5 of 9 Results 5 Per Page ▲ </div>				

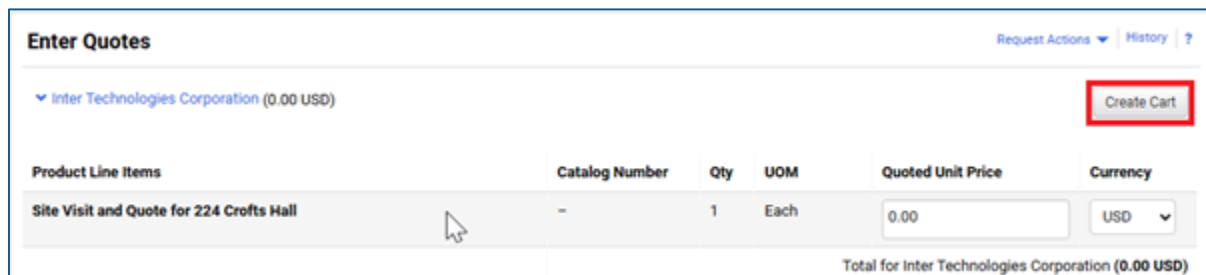
Figure 9

Step 10: Enter Quotes

Upon refreshing the page, the Enter Quotes section will appear with line-item details and a field to enter the quoted unit price.

If you have requested equipment only and have entered all of the hardware, you can wait for the quote to be responded to before creating a cart.

If you have requested a site visit, you can create a cart by entering "0" in the unit price field and click "Create Cart" (figure 10).



Product Line Items	Catalog Number	Qty	UOM	Quoted Unit Price	Currency
Site Visit and Quote for 224 Crofts Hall	-	1	Each	0.00	USD

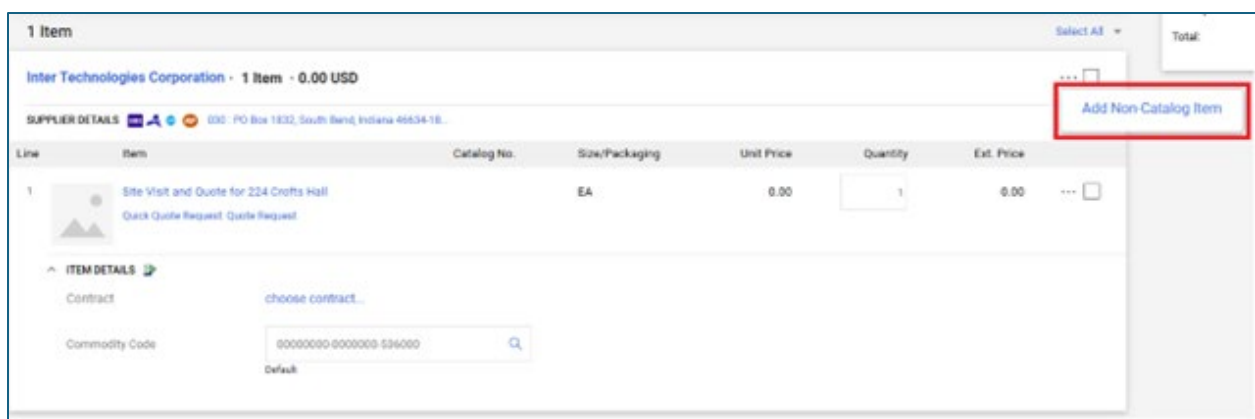
Total for Inter Technologies Corporation (0.00 USD)

Figure 10

Click "Yes" on the confirmation dialog box.

Step 11: Create Draft Cart

This will create a draft cart with the line item details and a price of "0". Once you receive the quotation from the supplier, add the specific line items with the quoted price by clicking the three dots menu and selecting "Add Non-Catalog Item" (figure 11).



Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	Site Visit and Quote for 224 Crofts Hall		EA	0.00	1	0.00

ITEM DETAILS

Contract: choose contract...

Commodity Code: 00000000-000000-000000

Figure 11

Enter the available line-item details and add attachments if needed. Click "Save" (figure 12).

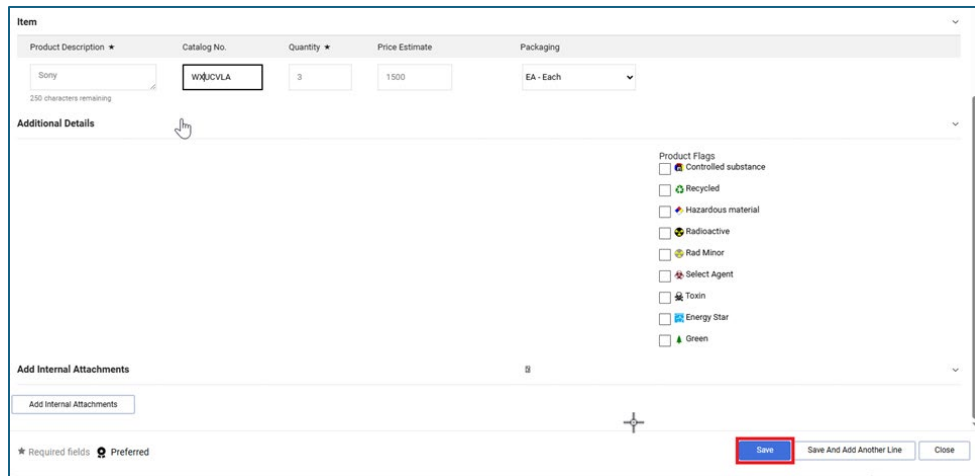


Figure 12

The line item will be added to the draft cart. Ensure you do not delete the initial line item with a price of "0" to maintain the link of the draft cart to the Quick Quote request form.

Step 12: Complete Order

Once all the line items are added along with the prices, click on "Proceed To Checkout" (figure 13).

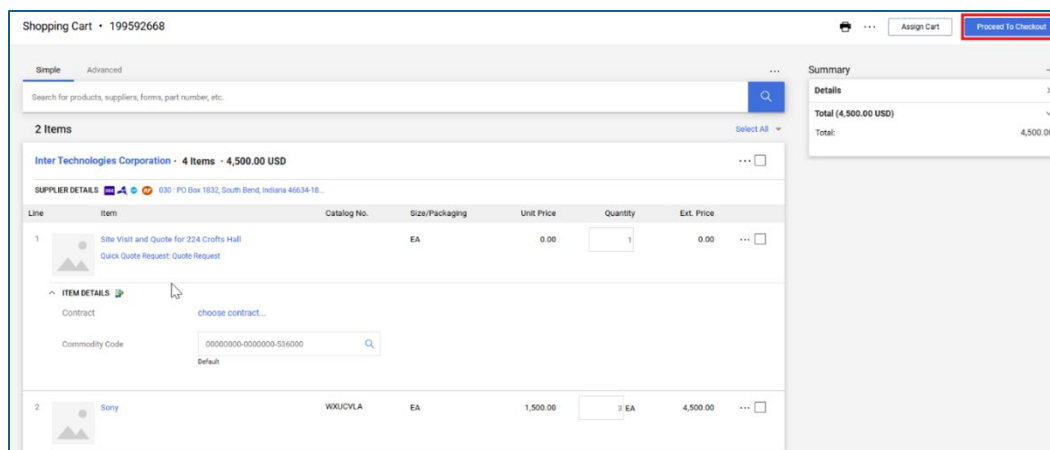


Figure 13

Complete your Requisition, and when ready, click "Place Order."