RFQF Buyer's Guide

The purpose of the RFQF (Request for Quotes-Formal) is to advertise the competitive procurement for solicitation of formal quotes from potential bidders to participate in the Reverse Auction. Buyers will be responsible for defining product categories, adding bidders, and publishing all bid related documents to the procurement portal. Once the responses have been received and the Opening Date has been reached, buyers will review the submissions to qualify bidders and determine a starting price for reverse auction items.

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Step One: RFQF (Request for Quotes-Formal) Creation

1.) Using your user-id and password, log into MAGIC at: https://portal.magic.ms.gov.

2.) Select **Procurement** then **Procurement Work Center**

3.) Select **RFx** under Strategic Sourcing
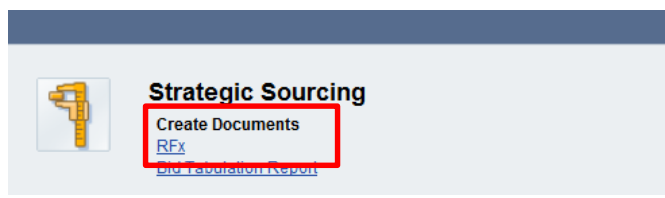
4.) Select **RFQF** as the bid type and then click **Continue**

5.) In the **RFx Parameters** tab, enter the following items:

| Field	Description
Start Date	First date/time of advertisement
Bidder Submission Deadline	Latest date/time quotes must be submitted to the agency
Opening Date	Earliest date/time bid responses can be opened by the buyer; cannot be prior to 8th working day after last advertisement date
Surrogate Bid Entry Deadline	Defaults (7) workings days from the submission deadline
Major Procurement Category	COMMODITIES
Sub Procurement Category	SUPPLIES/EQUIPMENT –NON TECHNOLOGY

Step Two: Add Questions for Vendors to the RFQF

1.) Click the **Questions** subtab then click **Add Question**.
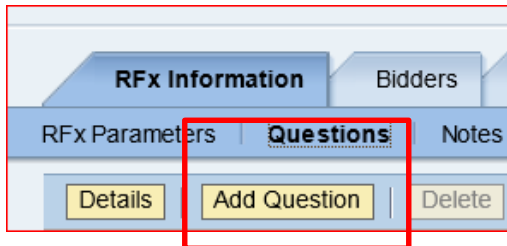
2.) You can click the **Search** button to do a search of all questions. Highlight the desired question and click the **Add** button.

3.) Questions can be marked as required by click the box. By marking a question as required, the question must be answered before the response can be accepted by the system. These questions will also print on the RFx output form.
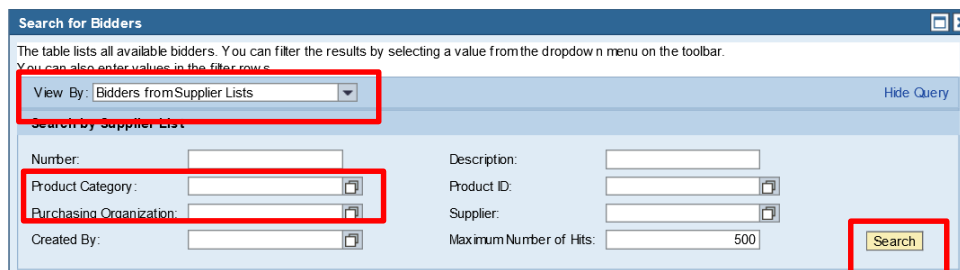
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Step Three: Add Bidders to the RFQF

1.) Click the **Bidders** tab
2.) Click **Search for Bidders**
3.) Click **From Internal Directory** from the dropdown under Search for Bidders
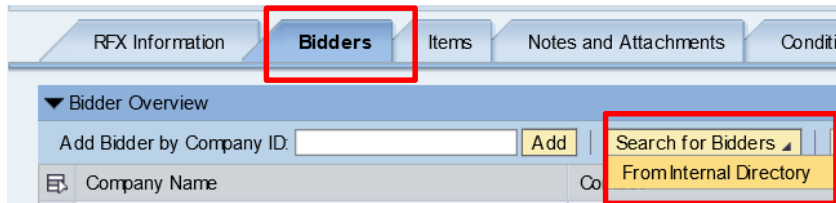
4.) Ensure that **Bidders from Suppliers Lists** is selected in the View By box.
5.) Enter the **Product Category** and click the **Search** button.

6.) When the vendors are returned, highlight the desired vendor(s). Multiple vendors can be selected by pressing the **Shift** key when selecting them.
7.) Click **Add Selected Bidders** when the desired ones are highlighted.

8.) The selected bidders will receive an email (if one is entered in the system) that a bid opportunity is available.
9.) The bidders list will be more updated over time as the process is used by agencies.

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Step Four: Add Items to the RFQF

1.) On the **Items** tab, ensure that you review and make any adjustments to the check boxes that control the bid.

Number 3140000941	Smart Number 1130-18-R-RFQF-00007	Type RFQ - Formal	Status Saved	Created On 09/26/2017 10:07:33

| RFX Information	Bidders	Items	Notes and Attachments	Conditions	Weights and Scores	Approval	Tracking

▼ Item Overview

☑ RFx Response Required for All Items   ☐ Bidder Can Add New Items   ☑ Allow RFx Response Modification   ☐ Bidder Can Change Quantities

Option	Description
RFx Response Required for All Items	Uncheck to allow bidders to respond to some line items or check to require all. Must be checked if it's an all or nothing award.
Bidder Can Add New Items	Allows additional line items (i.e. Alternate/Substitute items) to be proposed by bidder. It should not be checked.
Allow RFx Response Modification	Allows the bidders to make changes to their offers until the submission deadline. It should be checked.
Bidder Can Change Quantities	This box will be unchecked and will not apply to Competitive bids. Items will be bided out using a fixed quantity (i.e. quantity of "1"). It should not be checked.

2.) Click **Add Line ▲** and select **Material** from the dropdown.

3.) The following fields must be entered: **Description**, **Product Category**, **Quantity**, and **Unit of Measure**.

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Step Five: Add Notes to the RFQF

1.) Click the **Notes and Attachments** tab then click the **Add** button. From there, pick the category of the type of note and attachment you would like to create.
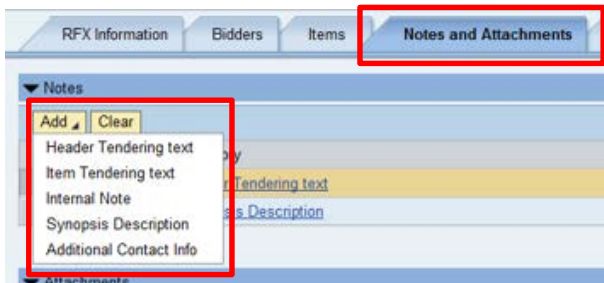

2.)   Listed below is a description and example text of some of the available options.

Header Tendering Text

This is a detailed description of the RFx, it will not appear on the bid board until the prospective bidders click on the link for bid attachments. It will print on the RFx form under "Notice to Vendor" section of the form. Online bidders will also see this text field.
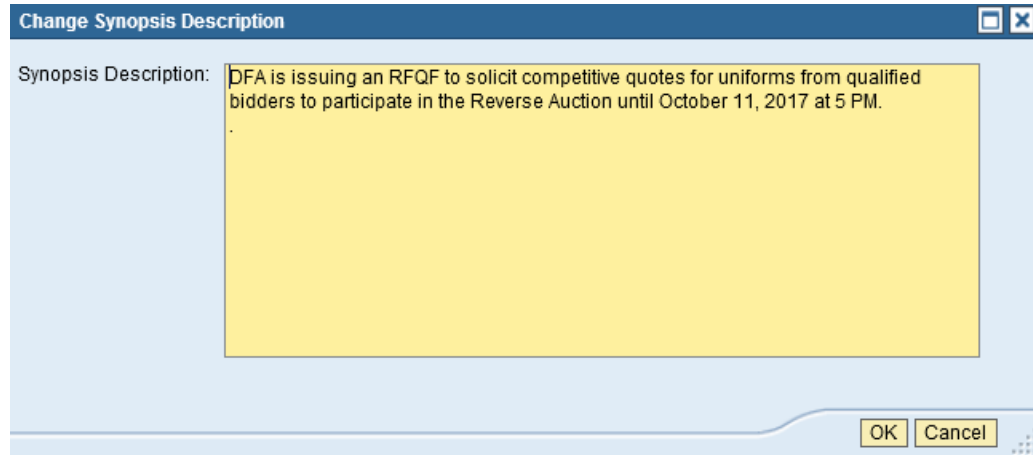
Example:
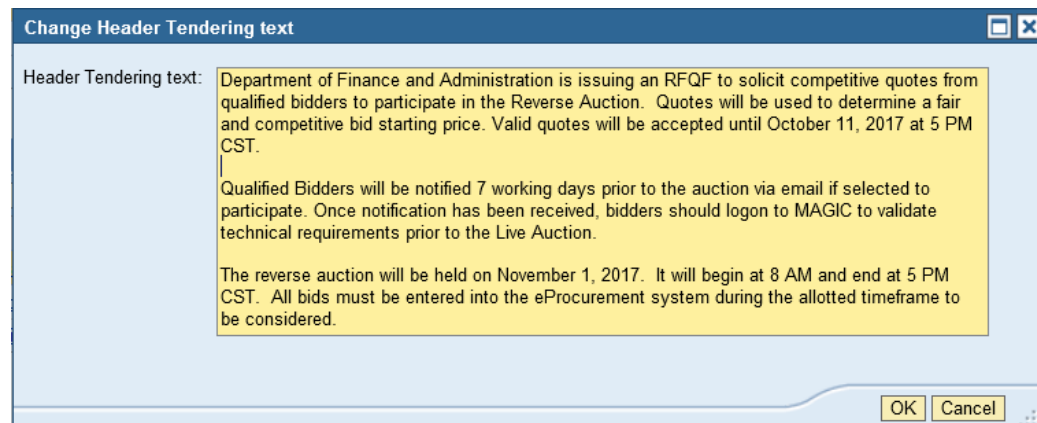
Synopsis Text (required)

This should be a short concise description of 80 characters or less that will appear on the bid board and print on the RFx form under "Notice to Vendor" section of the form. Online bidders will also see this text field.
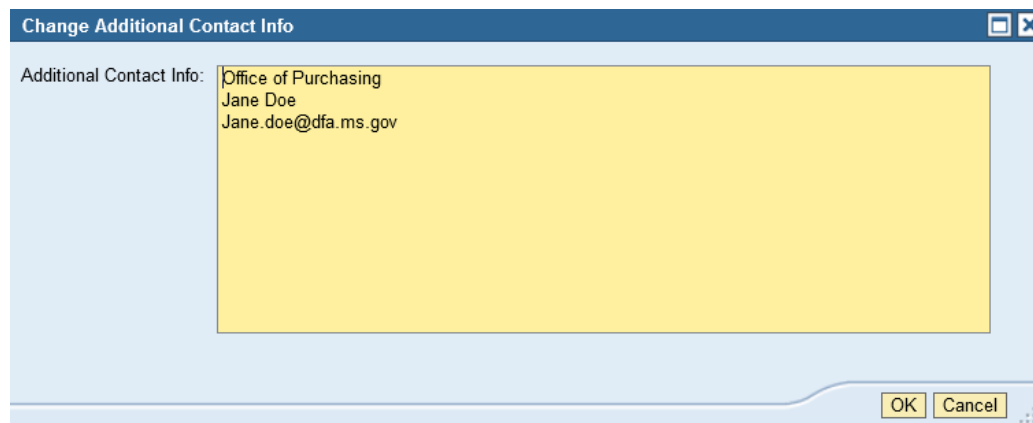
Example:

Additional Contact Info

This is a more detailed description of contact information, i.e. where and who the RFx questions should be routed to. It will print on the RFx form under "Additional Contact Info" section. Online bidders will also see it as a text field.
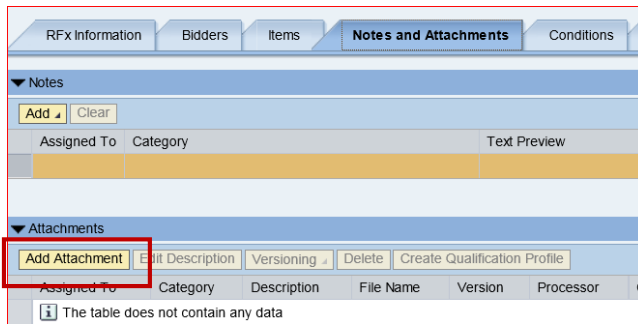
Example:

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Step Six: Add Attachments to the RFQF

1.) Click **Add Attachments** under the Notes and Attachments tab

2.) Attachments can be in any file extension. However, its practice to use common file extension such as pdf, xls, or doc.

Click the **Browse…** button to locate the saved file on your computer. To have the document visible to the vendor(s), uncheck the **Visible Internally only** box. When the file is selected, click the **OK** button.
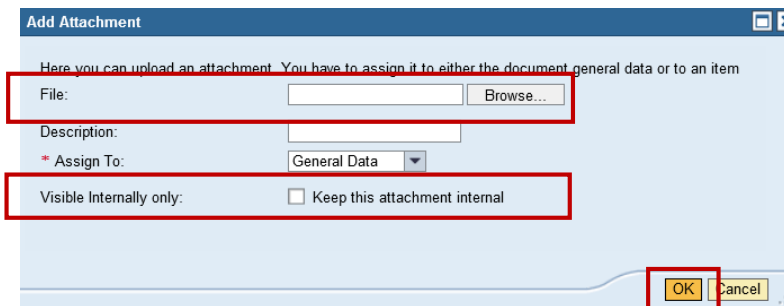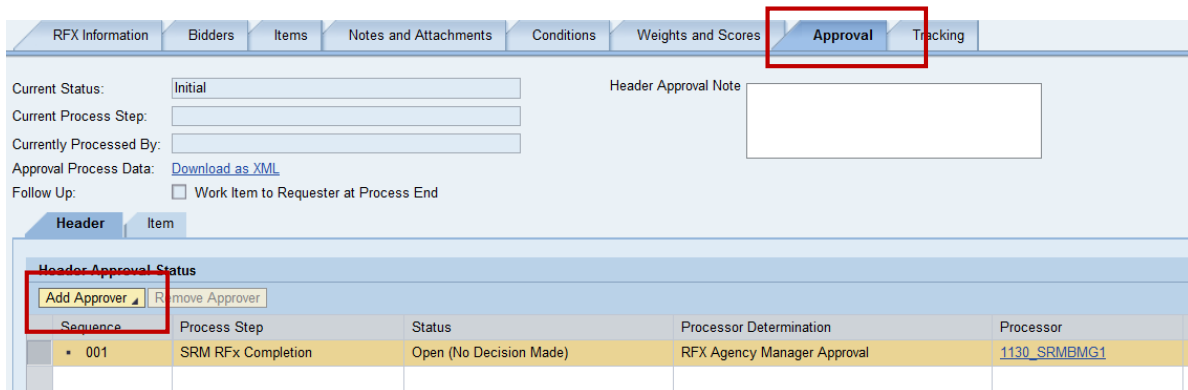

3.) Click the **Edit Description** button to edit the short description of the attachment. The description field will be displayed on the bid board.
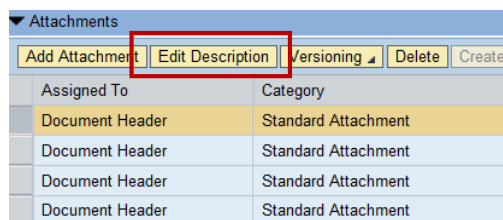
4.) After you have confirmed that the bid request has all the relevant information, click the Publish button to publish the RFQF. The Publish button is only visible in Edit mode.
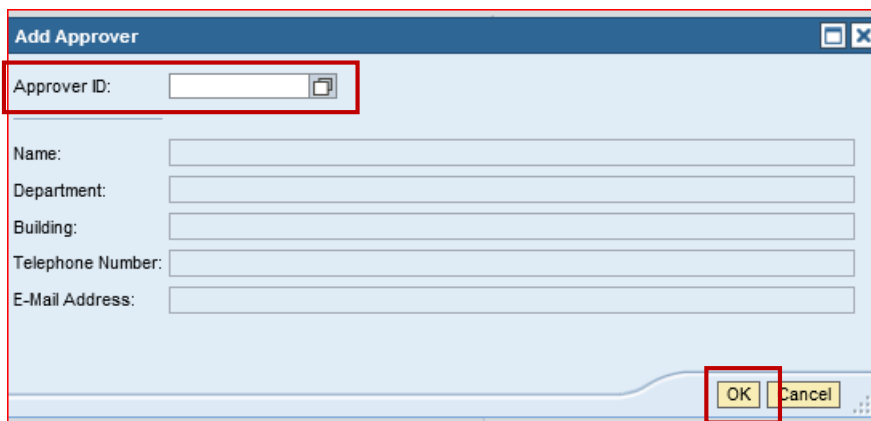
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Step Seven: Approve the RFQF Using the Universal Worklist

1.) The RFQF will only require Agency Manger Approval. To add an ad hoc approval, click **Add Approver** under the **Approval** tab.

2.) Enter the appropriate **Approver ID** or click the **Search** icon to find the user. Once selected click the **OK** button.


3.) Once all levels of approval have been processed, the RFQF will automatically publish to the State of MS Bid Board on the RFQF Start Date and Time.
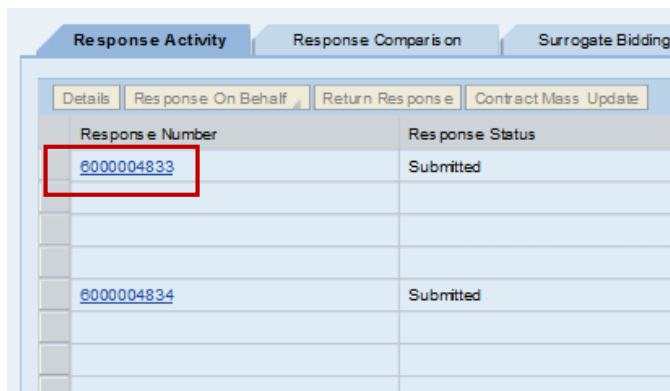
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Step Eight: Qualifying Bidders to Participate in the Reverse Auction

Once the agency buyer has received the initial quotes, the prequalification of submitted responses shall be performed. Paper bids must be entered into MAGIC on behalf of the supplier as a surrogate bid entry. Only the qualified responses will be "Accepted" within the system. Suppliers who did not qualify should be sent a letter stating reasons of why the initial proposal was rejected.
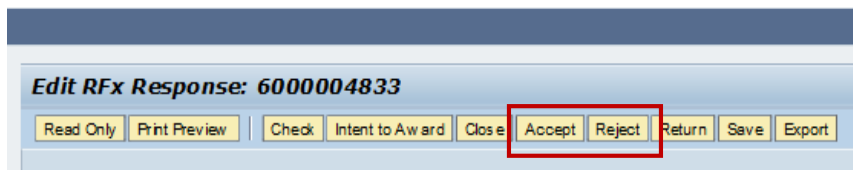
1.) Click **Responses and Awards**
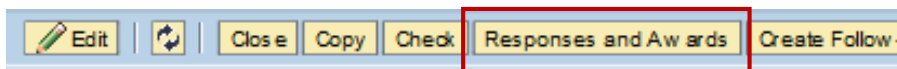
2.) Select the **Response Number** of the submitted responses to review.

3.) Click **Accept** if the buyer determines that the supplier qualifies to participate in the auction. Click **Reject** if the buyer determines that the supplier does not qualify to participate in the auction.
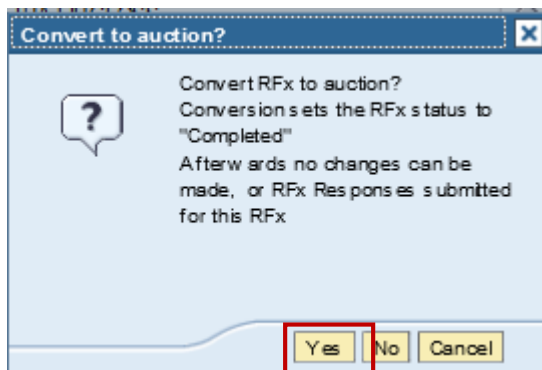

4.) Continue the above process until all the suppliers who have been reviewed.

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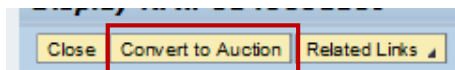

Step Nine: Convert an RFQF to an Auction

1.) Click **Convert to Auction**

2.) Click **Yes** in the Convert to Auction? Confirmation box.

3.) Click **Convert to Auction**

4.) Secure the auction number and click **OK**