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User's Guide

**(Bidder - Quoter Information for a Proposal Chapter
Extracted from User's Guide)**

**Trns•port CRLMS[®]
Non-Agency Users**

Version 2.02

January 2013

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6 Bidder/Quoter Information for a Proposal

6.1 Selecting the Letting for Bidder/Quoter Information

Bidders are vendors that have either submitted a bid in the bid letting or collected quotes from subcontractors, suppliers, truckers, or brokers for a bid in the bid letting. *Quoters* are vendors that have submitted quotes as subcontractors, suppliers, truckers, or brokers to a bidder in a bid letting.

To access the Bidder/Quoter Overview component, click the **Bidder Quoter** link on the CRLMS Non-Agency component. To enter or make changes to bidder/quoter information on a proposal, you must first locate the letting and bidder. Type letting criteria in the Quick Find search box, or click **Show first 10**.

The system displays a list of rows for all the lettings in the system that match your search criteria and that include bidder/quoters for which you are assigned vendor authority. Each row includes an **Actions** button, the number of quoters recorded for the letting, and current values for the following fields:

- Letting ID
- Letting Date
- Bidder
- Workflow Phase

To change or enter new bidder/quoter information for a proposal, click the **Quoters** field link or select **Open** from the **Actions** menu on the row for the letting and bidder. For more information, see [Managing Bidder/Quoter Information](#).

To add a new bidder/quoter row, select **Add** from the **Actions** menu on the component header. For more information, see [Adding a Bidder/Quoter](#).

To delete a letting/bidder row, select **Delete** from the **Actions** menu on the row. The system shades the row gray to indicate it is marked for deletion. To reverse the delete action, click the **Undo** button. Click **Save** when finished to apply your changes to the system.

When you are finished recording bidder/quoter information for a letting/bidder row, submit the information to the transportation agency by signing it. The bidder/quoter information is not available to the agency until it is signed. To sign bidder/quoter information, select **Sign** from the **Actions** menu on the letting/bidder row. For more information, see [Signing Bidder/Quoter Information](#).

6.2 Managing Bidder/Quoter Information

The Bidder/Quoter Summary contains a list of all the bidders currently recorded for the selected letting. To access the Bidder/Quoter Summary component from the Bid Letting Overview, select **Open** from the **Actions** menu on the appropriate row.

Each row on the Bidder/Quoter Summary displays an **Actions** button, a count of how many quotes have been recorded for the bidder, and current values for the following fields:

- No Quote Received
- Vendor
- Short Name
- Signed By
- Signed Date

Expand a bidder row to display quotes for the bidder in subordinate rows. Each subordinate row displays the following information for the quoter:

- Vendor
- Short Name

To delete a bidder from the letting, select **Delete** from the **Actions** menu on the bidder's row. The system shades the bidder row and any subordinate quoter row gray to indicate they are marked for deletion. To reverse the delete action, click the **Undo** button. To apply your changes, click the **Save** button.

To delete a quoter from a bidder, select **Delete** from the **Actions** menu on the quoter's row. The system shades the quoter row gray to indicate it is marked for deletion. To reverse the delete action, click the **Undo** button. To apply your changes, click the **Save** button.

To add or change quoter information for a bidder, select **View Quoter Proposal** from the **Actions** menu on the quoter's row. For more information, see [Maintaining Bidder/Quoter Information for a Proposal](#).

When you have finished recording quoter information for a bidder row, submit the information to the transportation agency by signing it. Bidder/quoter information is not available to the agency until it is signed. To sign bidder/quoter information, select **Sign** from the **Actions** menu on the bidder's row. For more information, see [Signing Bidder/Quoter Information](#).

6.2.1 Adding Bidders to the Letting

To add a new bidder on the Bidder/Quoter Summary component, follow these steps:

1. On the Bidder/Quoter Summary, click the **Select Bidders** button.

The system displays a modal window for selecting bidders.

2. Locate the vendor you want to add by typing criteria in the Quick Find search box or by clicking **Show first 10**.

The system lists all the vendors that meet your search criteria.

3. Click the row for each vendor you want to add as a bidder in this letting.

The system adds a green check mark beside each vendor you select and shades the row blue. To cancel a selection, click the selected row again.

4. Click the **Add to Letting** button.

The system closes the modal window and takes you to the Bidder/Quoter Summary with the new bidders added to the list.

For information about how to add a new bidder on the Bid Letting Overview page, see [Adding a Bidder/Quoter](#).

6.2.2 Adding Quoters to a Bidder

To add one or more quoters to a bidder, follow these steps:

1. On the Quoter/Bidder Summary, choose **Select Quoters** from the **Actions** menu on the bidder's row.

The system opens a modal window for selecting quoters.

2. Locate the vendor you want to add as a quoter by typing criteria in the Quick Find search box or by clicking **Show first 10**.

3. Click the row for each vendor you want to add as a quoter.

The system adds a green check mark beside each vendor you select and shades the row blue. To cancel a selection, click the selected row again.

4. Click the **Add to Bidder** button.

The system closes the modal window and displays the new quoters added to the bidder row.

6.3 Adding a Bidder/Quoter

To add a new bidder for a bid letting, click the **Bidder Quoter** link in the CRLMS Non-Agency component. On the Bid Letting Overview, select **Add** from the **Actions** menu on the component header. The system takes you to the Add Bidder Quoter component. Enter or select a value in these fields:

- Letting
- Quoter
- Bidder

The list in the Bidder field is filtered to show all reference vendors for which the user has vendor authority. The Quoter can be any reference vendor. When you are finished, click the **Save** button. The system displays a message to confirm that your changes were saved in the database.

6.4 Maintaining Quoter Information for Proposals in a Letting

Bidders are vendors that have either submitted a bid in the bid letting or collected quotes from subcontractors, suppliers, truckers, or brokers for a bid in the bid letting. *Quoters* are vendors that have submitted quotes as subcontractors, suppliers, truckers, or brokers to a bidder in a bid letting.

As a bidder in a bid letting, you must submit information to the agency for all the quotes you have received for proposals in the bid letting. The Quoter Proposal Summary component contains a list of all the proposals for which you have received quotes from the selected quoter. To access the Quoter Proposal Summary, navigate to the Bidder/Quoter Summary, expand a bidder row, and then select **View Quoter Proposal** from the **Actions** menu on the appropriate quoter row.

To maintain information for another quoter who submitted quotes to this bidder, click the down arrow in the **Quoters** field on the component subheader, and select the new quoter. The system refreshes the list to show proposals for which the bidder has received quotes from the selected quoter.

To add or change quoter information, first locate the proposal by typing criteria in the Quick Find search box or by clicking **Show first 10**. The system displays a list of proposals for which this bidder has received quotes. Each row displays an **Action** button, the Proposal, and Description.

You can enter additional information about the quoter in the Comments field at the top of the component.

Some agencies only require bidders to submit the proposals on which they have received quotes; other agencies require that you submit the amount quoted for each proposal item. If your transportation agency requires you to submit quoter information at the proposal item level, each row in the list expands to display a list of the proposal items quoted in subordinate

rows. If you are not required to submit item-level information, the proposal rows do not expand.

To delete a proposal, select **Delete** from the **Actions** menu on the proposal's row. The system shades the row gray to indicate it is marked for deletion. You can click the **Undo** button to cancel the deletion. Click **Save** when you are finished to apply your changes to the system.

6.4.1 Adding a Proposal

To add a proposal for which you have received quotes, perform these steps:

1. On the Quoter Proposal Summary, click the **Select Proposals** button.

The system displays a modal window for selecting proposals in the bid letting.

2. Locate a proposal you want to select by typing criteria in the Quick Find search box or by clicking **Show first 10**.

The system lists all the proposals that meet your search criteria.

3. Click the row for each proposal you want to add to the list.

The system adds a green check mark beside each proposal you select and shades the row blue. To cancel a selection, click the selected row again.

4. Click the **Add to Quoter** button.

The system closes the modal window and takes you to the Quoter Proposal Summary with the new proposals added to the list.

5. Click the **Save** button to apply your changes to the system. If your agency requires you to submit item-level quotes, see [Maintaining Item-Level Quotes](#).

The system displays a message to confirm that your changes were saved in the database.

To sign and submit your bidder/quoter information, click the [Bidder/Quoter](#) quick link to go to the Bidder/Quoter Summary component. For more information, see [Managing Bidder/Quoter Information](#) and [Signing Bidder/Quoter Information](#).

6.4.2 Maintaining Item-Level Quotes

If your agency requires you to submit quotes at the proposal item level, expand a proposal row to display the items quoted for that proposal. Each item row displays the following information:

- Proposal Line Number
- Item ID

- Description
- Supplemental Description
- Quote
- Work Code
- Work Code Source

You can add and change information in the **Quote** and **Work Code** fields.

Adding Item Quotes

To add new item quotes to a proposal, perform the following steps:

1. Choose **Select Proposal Item** from the **Actions** menu on the proposal's row.

The system displays a modal window for selecting items in the proposal.

2. Locate an item you want to select by typing criteria in the Quick Find search box or by clicking **Show first 10**.

The system lists all the items that meet your search criteria.

3. Click the row for each item you want to add to the list.

The system adds a green check mark beside each item you select and shades the row blue. To cancel a selection, click the selected row again.

4. Click the **Add to Quoter Proposal** button.

The system closes the modal window and takes you to the Quoter Proposal Summary with the new items added to the proposal.

5. When you are finished entering quotes, click the **Save** button to apply your changes to the system.

The system displays a message to confirm that your changes were saved in the database.

To sign and submit your bidder/quoter information, click the Bidder/Quoter quick link to go to the Bidder/Quoter Summary component. For more information, see [Managing Bidder/Quoter Information](#) and Signing Bidder/Quoter Information.

6.5 Signing Bidder/Quoter Information

The Sign Bidder Quoter component provides a guided process by which you review, verify, and sign bidder/quoter information for a proposal.

 **Caution:** After you sign bidder/quoter information, it can no longer be changed or deleted.

Follow these steps to sign bidder/quoter information:

1. On the Bid Letting Overview component, select **Sign** from the **Actions** menu on the bid letting row.

The system automatically generates the Bidder Quoter report and displays the report on the Sign Bidder Quoter component.

2. Review the Bidder Quoter report. When you have determined the information in the report is correct, click the **Next** button at the bottom of the component.

*The system displays the agency's verification requirement for the bidder/quoter information. You can click the **Previous** button to return to the Bidder Quoter report if needed.*

3. Review the verification requirement and click the **Next** button to proceed.

The system displays the Sign step.

4. Sign the bidder/quoter information by clicking the **Sign Bidder Quoter** button.

*The system verifies that you are authorized to sign the bidder/quoter information, sets the **Signed By** field with your User ID and the **Signed Date** with the current system date, and displays a message that the bidder/quoter information was signed successfully. The system then attaches the PDF files of the Bidder Quoter report and the Bidder Verification report to the bidder record.*