TELEPHONE QUOTATIONS SHEET

DATE: _____

NOTE: See "General Information" for pertinent information and instructions in obtaining telephone quotations.
This telephone quotations sheet must be attached to the procurement file and saved for five years for auditing purposes.

YOUR NAME: _____ RQS/RQM#: _____

AGENCY: _____ DELIVERY DATE: _____

QUANTITY	ITEM	MINIMUM SPECIFICATIONS

A. VENDOR: _____ SALESPERSON & EMAIL: _____

PHONE: _____ DELIVERY DATE: _____

DESCRIPTION:	UNIT PRICE	TOTAL PRICE
	$	$
	$	$
	$	$
	$	$

B. VENDOR: _____ SALESPERSON & EMAIL: _____

PHONE: _____ DELIVERY DATE: _____

DESCRIPTION:	UNIT PRICE	TOTAL PRICE
	$	$
	$	$
	$	$
	$	$

C. VENDOR: _____ SALESPERSON & EMAIL: _____

PHONE: _____ DELIVERY DATE: _____

DESCRIPTION:	UNIT PRICE	TOTAL PRICE
	$	$
	$	$
	$	$
	$	$

AWARDED TO	COMMENTS FOR AUDITING PURPOSES	DATE	YOUR SIGNATURE

TELEPHONE QUOTATIONS: GENERAL INFORMATION

Agencies are authorized to obtain telephone quotes for purchasing under $5,000.00 without the involvement of the Division of Purchasing provided that:

1. At least two (preferably three) telephone quotations are obtained.
2. Award is made to the vendor submitting 1) the lowest quote, 2) while meeting minimum specifications, and 3) required delivery date established by the Agency.
3. The specifications and delivery date established by the Agency is reasonable and not restrictive.
4. The "Telephone Quotation Sheet" is completed and the sheet maintained in a file with all procurement paperwork, for five years, for auditing purposes.

NOTE: Contact the Division of Purchasing if assistance is needed in identifying potential vendors.

INSTRUCTIONS TO AGENCY:

During the process of obtaining telephone quotes **DO NOT** disclose any information of other quotes obtained (including price, delivery, brand, etc.). This violates the competitive nature of receiving quotes and is unfair to other vendors quoting. Afterward, prices are public information.

The proper procedure for obtaining telephone quotes is as follows:

1. Identify the Agency you represent.
2. Indicate that you are asking for a formal quote that may result in a binding contract.
3. Identify the item(s) or service required and any specifications. In describing specifications to vendors, features and functions or services desired should be the main focus. Brand Name/Model can be used however, approved equals must be considered in making award. Write down all pertinent information (front of this sheet) on specifications of items(s) being quoted by vendors, or deviations from specifications required by the Agency.
4. Give them the shipping destination and required delivery date.
5. Ask for unit price (including shipping) to supply the required item to the state. Unit price is the price of the item purchased including all shipping charges.
6. Ask for the number of days required for delivery after the receipt of the order.
7. Ask for Warranty terms (if applicable).
8. Ask for acceptance of the State's Terms and Conditions which are found at purchasing.utah.gov by following this chain: Buyer Information>Purchasing and Contract Forms. The most commonly used is near the bottom of the page labeled "Purchase Order Contract Terms and Conditions." Also available are the Agency Contract Terms and Conditions labeled "Standard Terms and Conditions."
9. After obtaining telephone quotes, determine which is the lowest meeting minimum specifications and required delivery date.
10. Notify the successful vendor of the award.
11. Attach a copy of the Telephone Quotations Sheet to warrant request with invoice for payment.