ARIZONA
PROCUREMENT PORTAL
QUICK REFERENCE GUIDE

Creating, Releasing, and Awarding a Spot Bid

This document is a quick reference guide for users wishing to create and release spot bids (also known as sourcing from a requisition) in the Arizona Procurement Portal (APP). If you have any questions, please contact the APP Help Desk at app@azdoa.gov. Additional resources are also available on the SPO website: https://spo.az.gov/.

The Sourcing from a Requisition (or Spot Bid) process refers to when a requisitioner can create a simplified sourcing project for an on-contract or off-contract requisition. As part of this simplified sourcing project, which may be known as 3 Bids and a Buy at some agencies, no questionnaires or evaluations will be completed, and a minimum of 3 offers must be received for an award to be created.
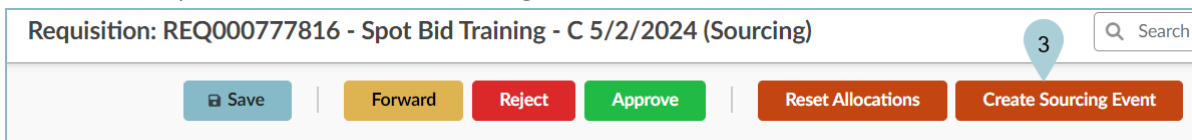
To perform a spot bid on a requisition, a requisitioner must have sourcing rights and a delegated authority over $10,000. If a requisitioner creates a requisition above their delegated amount, it must go to their Procurement Officer to perform sourcing. If the Procurement Officer for the agency does not have the delegated amount, they will have visibility to sourcing.

Creating a Sourcing Event

> *A Spot Bid is created from an existing Off-Contract requisition. The steps in this Quick Reference Guide are based on an existing Off-Contract requisition that will be used to create a Spot Bid. If you have not created an Off-Contract requisition, follow the step-by-step process in the Creating Off-Contract Purchases Quick Reference Guide.*

1. Locate the Off-Contract Purchase under the Procurement tab.

2. Click the pencil ✏ icon to open.

3. Once in the requisition, click **Create Sourcing Event**.

Requisition: REQ000777816 - Spot Bid Training - C 5/2/2024 (Sourcing)   3   🔍 Search

[🖫 Save] | [Forward] [Reject] [Approve] | [Reset Allocations] [Create Sourcing Event]

4. Verify all required fields in the Create a New Sourcing Project section have been completed.
5. Click **Go to Sourcing Project**.

Identifying Suppliers/Preparing and Releasing a Spot Bid

If you have not exited out of the sourcing project created in the previous section, continue with the following steps. If you have exited out of the sourcing project, use the Sourcing tab to access and open the newly created project.

1. Navigate to the **Identify Suppliers** left margin tab.
2. Search for suppliers. Follow the step-by-step process in the Identifying Suppliers Quick Reference Guide. Add information in the **Commodities** and/or **Business Indicator** fields to search for suppliers.
3. Click **Select Suppliers**.

4. Click **OK**.

5. Click **Save** at the top of the page.
6. Navigate to the **Prepare RFx** left margin tab.
7. Add a date and time in the **Bid Due Date** field.
8. Click **Save**.

> You can also upload a pricing catalog. For information on this, please use the following QRG: *Catalog - Create and Publish.*

9. Click the **Send Solicitation for Approval** button.

10. Click **Send**.

11. Review the information on the pop-up, including the information in the email section.
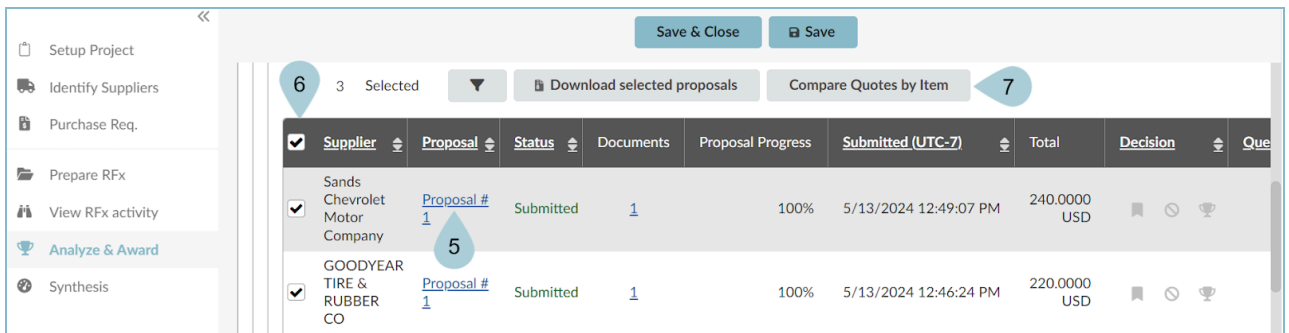12. Click **Send & Close**.

13. Click **OK** for each supplier to receive an email.
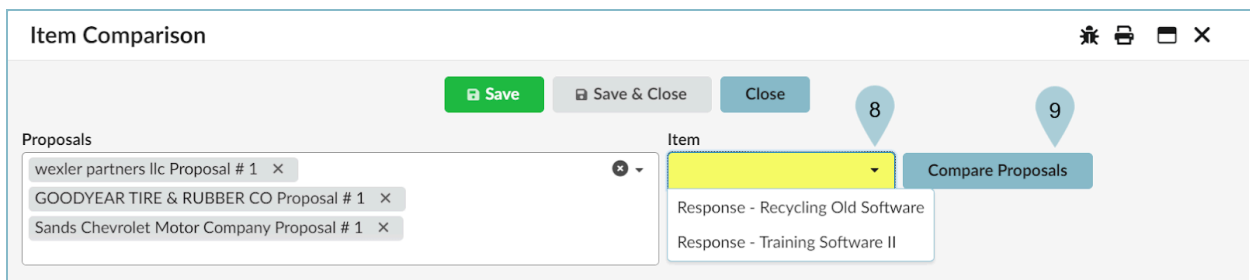
Awarding a Spot Bid Sourcing Project

📋 *Review the Spot Bid sourcing project once the suppliers have submitted their bids and the bid period is closed.*

1. Locate the sourcing project under the Sourcing header tab.

2. Click the pencil 🖊 icon to open the desired sourcing project.
3. Navigate to the **Analyze & Award** left margin tab.
4. View the suppliers who have submitted a proposal.
5. Click the **proposal link** for each supplier to review the individual proposals.
6. To view multiple proposals simultaneously, click the column header's checkbox.
7. Click the **Compare Quotes by Item** button.

8. On the Item Comparison pop-up, use the **Item** dropdown to select the item to view.
9. Click the **Compare Proposals** button.

10. Review the responses, and click **Close**.

	wexler partners llc Proposal # 1	GOODYEAR TIRE & RUBBER CO Proposal # 1	Sands Chevrolet Motor Company Proposal # 1
Code	1	1	1
Parent			
Group(s)			
Type	Required Item	Required Item	Required Item
Label	Training Software	Training Software	Training Software
QTY	2.00000	2.00000	2.00000
Order			
Reference Price	125.0000	125.0000	125.0000
Commodities	Computer based training software	Computer based training software	Computer based training software
Target Price	0.0000	0.0000	0.0000

11. Once a selection is made, click the trophy [trophy icon] icon for the supplier you wish to award.
12. Click **OK**.
13. Navigate to the **Synthesis** left margin tab.
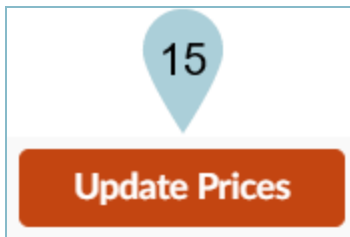14. Click the **REQ#** in the Origin P.R. column.

Supplier	Lot / Round	Proposal	Decision	Award amount	Notification	Contract	Origin P.R.
PARTS FORWARD LLC	Lot : 1 / Round : 1	Proposal # 1	Selected	200.0000 USD	Selected : to be notified	Create/Update a contract	[REQ000777815] Training S...

15. Click the **Update Prices** button at the top of the page.

16. Click the checkbox to select the line item.
17. Click **Save & Close**.

18. Click **OK**.

19. Scroll down to the **Items & Services** section and click the pencil ✏ icon for the line item.

20. Click the **Copy Proposal Documents** button at the top of the page.

21. Scroll down and open the **Additional Information** section.
22. The original document(s) and the additional document(s) displays.

23. After verifying that documents have been added, close the pop-up.

> *You only have to copy proposal documents for one line item.*

24. Add attachments for internal view under the **Header** section.

> *You must add the signed 205A Forced Labor Ban of Ethnic Uygurs document (SPO Forms and Documents) to either the Header attachments (step 24) or the internal chat section 💬 of the requisition before sending it to a purchase order. Do NOT add this document to the requisition line items.*

> *The budget information for all line items must be reviewed and completed before sending out for approval.*

25. To complete the process, click **Approve**.

Resources

Click the link below for more information on Sourcing Project creation processes in APP:

https://spointra.az.gov/arizona-procurement-portal/app-support/quick-reference-guides-176-upgrade/source-contract-qrgs-176