ARIZONA

PROCUREMENT PORTAL

QUICK REFERENCE GUIDE

Prepare RFx/Items Tab

This document is a quick reference guide for users wishing to create items for their RFx 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 Items tab creates items procurement users would like suppliers to bid on. Users can add additional grid items from the catalog and upload items from a spreadsheet.

Setting Up Items

1. From any page in APP, select **Sourcing Projects** from the Sourcing drop-down menu.
2. Search for the solicitation you wish to edit, then click the **Pencil** icon to open it.
3. Click the **Prepare RFx** left margin tab.
4. Click the **Items (F)** header.
5. To add the first item, enter:
   a. **Code (V)** - a unique identifier for the item
   b. **Type (V)** - indicates if the item is a Required Item, Optional Item, Additional Fee, etc.
   c. **Label (V)** - a description of the item.

> *The (V) indicates the field is visible to a supplier.*

6. If necessary, enter the **Quantity**, **Reference Price**, **Unit**, **Target Price**, **Commodity**, etc.

> *Do not under any circumstances remove or modify the columns shaded in gray.*

7. Once complete adding an item, click **Save**.

8. Continue to add items to the grid as necessary. Users can simply complete the blue new item line that appears or select **Add an Item** from the **Actions** drop-down menu.

9. After adding each new item, click **Save**.
10. Users can utilize the **Preview** button to view the item grids as a supplier would see them.

*Users can also create and configure item grids in Excel by clicking the **Export grids to Excel** button. Users can then create the item on their grid by following the instructions in the Excel sheet. Once complete configuring your item grids, users can upload the completed grids to APP by clicking the **Import Grids from Excel** button.*

Adding Grids

1. Click the **+ Add Grid** button to add a new item grid. This allows you to group items in one grid.

2. On the pop-up, click **Create Grid**.

3. Enter the **Label** for your grid.
4. Select **[Std_main_grid]** from the **Grid Type** dropdown.
5. Enter the **Order** number.
6. Once complete, click **Save & Close**.

7. Users can now add items to their new grid by following the steps previously mentioned.

Resources

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

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