

Telephone Quotation Sheet

For purchases with individual items over \$1,000 and up to a total of \$5,0000, agencies shall obtain price competition, and shall purchase the item from the vendor offering the lowest quote.

Note: See "General Information" for pertinent information and instructions in obtaining telephone quotations.

Buyer's Name:	Agency:
Required Delivery Date:	
Description/Quantity of Item(s) and/or Service(s):	

	Vendor #1	Vendor #2	Vendor #3
Vendor Name:			
Sales Person:			
Email Address:			
Telephone:			
Physical Address:			
Date/Time of Quote:			
Comments:			

Product Description/Quantity	Vendor 1 Quote	Vendor 2 Quote	Vendor 3 Quote
Total	\$	\$	\$

Comments:	Awarded To:
Signature:	Date:

Keep this sheet on record for three years plus the current year.

Telephone Quotations: General Information

Telephone quotes are authorized for single items that cost less over \$1,000 and aggregate purchases over \$5,000. Remember, formal procurement must be followed for ongoing purchases, or for purchases that exceed \$50,000. When gathering quotes for informal procurement, the following rules apply:

1. At least two, preferably three telephone quotations are obtained. Requesting email quotes from the vendor to verify a phone quote is best practice, but not required.
2. Award is made to the vendor submitting the lowest quote that meets minimum specifications and that can meet the delivery date.
3. The specifications and delivery date established by the agency must be reasonable and not restrictive.
4. The "Telephone Quotation Sheet" is completed and the sheet maintained in a file with all procurement information.

Instructions to SFA

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. After the procurement is complete, prices are public information.

The proper procurement procedure for obtaining telephone quotes is as follows:

1. Using the Telephone Quotation Sheet, write down all pertinent information pertaining to item(s) or service(s) required by the agency. Outline specifications, features, functions or services required. Brand Name/Model can be used, however, approved equals must be considered in making award.
2. Call the vendor. Identify the Agency you represent.
3. Give them the shipping destination and required delivery date.
4. Using the description written during step 1 above, inform the vendor of the item(s) or service(s) required. Write down all pertinent information pertaining to item(s) or service(s) being quoted by vendors, including any deviations from specifications.
5. Ask for unit price (including shipping) to supply the required item to the state. Unit price is the prices 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. After obtaining telephone quotes, determine which is the lowest meeting minimum specifications and required delivery date.
9. Notify the successful vendor of the award.
10. Telephone Quotation Sheet and any other relevant paperwork (receipts, email correspondence, all quotes, etc) should be saved in a file for three years plus the current year.

This document has been adapted from the Telephone Quotation Sheet prepared by the Utah State Board of Education, Purchasing Department.