<b>CSUSB</b>	
LOGO	Juotation
Company Name:   Date:   Fax:   Tel:   Email Address:   Description	Address: Quoted by: Website: Quantity Unit Price Total
Item#	

# Vendor Guide

Preparing and Submitting Quotes to Procurement and Contracts

California State University, San Bernardino Procurement and Contracts Department 5500 University Parkway, Sierra Hall 125 San Bernardino, CA 92407 Phone: 909-537-5142 | Website: https://www.csusb.edu/procurement

## **Quote Guide for Vendors/Suppliers**

### What is a Quote and When is it Used?

The business quote is an essential legal document presented to CSUSB by the vendor/supplier before items/services are rendered to serve as an estimate of the proposed service or commodities. The quote indicates to CSUSB, the quantities and descriptions of the items/services, how much will be due, and any taxes and fees included.

Essentially, a quote ensures that the university receives proper notification of the intent of the vendor to provide services/items. A formal quote is required before engaging in business with the university.

### How to Prepare a Quote

Basically a quote is divided into 3 main parts: The Header, Body and Footer.

### **Quote Header (Top Part)**

- Your letterhead: Your logo, business name, address, telephone, email and web address
- The words "Quote" clearly written towards the top of the page .
- A quote number. This is a running serial number that you maintain. You should only have one number per quote issued. Hence, no two quotes should have the same number.
- The date the quote was created/issued.
- Your payment terms (Note: Our standard payment terms are NET 45 days after goods are delivered or services are rendered).
- The name of the entity who requested the order, such as California State University San Bernardino or the University Enterprises Corporation, etc. It should include our complete "bill to" street address.

### **Quote Body (Middle Part)**

- A brief description of the goods/services you will supply, quantity, unit of measure, price per unit and total amount for individual items/services.
- Part numbers, stock numbers, etc. should be provided for merchandise.
- In the case of services, a brief scope of work and amount for individual services, hours worked, rate per hour, etc.

### **Quote Footer (Bottom Part)**

- Total amount of all individual items.
- Shipping or freight charge, if applicable. (Note that a copy of your freight bill will be required for all freight charges of \$50.00 or more).
- If applicable, the tax amount and total after tax .
- Payment instructions. Tell us how to make out your payment and where to mail a check.
- Comments you may have, such as delivery instructions, goods return policy, etc.

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## **Quote Guide for Vendors/Suppliers**

### **Delivery of Quote**

The quote should be sent in writing, to the individual who requested the items/services before the delivery of the goods or commencement of services, so that the quote may be attached to the requisition by the requesting department.

### **Providing Goods and Services to CSUSB**

Please refrain from providing goods or services to CSUSB until you are in receipt of a properly signed and executed purchase order from the CSUSB Procurement Department. If goods or services are provided before a purchase order has been issued, this may cause payment issues or delays. Please note that while departments may be the first point of contact and may request a quote, the CSUSB Procurement Department is solely responsible for the acceptance of the quote.

## Please await confirmation from CSUSB Procurement and obtain a valid Purchase Order number before proceeding with any transactions with the university.

### **Questions?**

If there are any questions regarding the quote/purchasing process, please reach out to the CSUSB Procurement Office.

#### **By Phone:**

Hours of Operation (Pacific Time)

- Monday through Friday, 8:00 AM to 5:00 PM (Regular Hours)
- Monday through Thursday, 7:00 AM to 5:00 PM (Summer Hours—June through August)
- Phone: 909-537-5142

### By Email:

• Procurement@csusb.edu

### **CSUSB Procurement Website:**

https://www.csusb.edu/procurement

## **Sample Forms**

You may purchase software programs that help you track the accounting for your business. These have a quote creation process within the program. Some smaller businesses manage their billing manually so a quote can be as simple as obtaining a book of quote forms from your local office supply store.

You may conduct an internet search for quote templates. Microsoft Office provides quote templates that may be used with Microsoft Office Word or Excel. Free sample quote templates can be downloaded online from Microsoft here: https://templates.office.com/en-us/quotes

Presented here are the most traditional quote layouts.

### Sample Form #1: Sale of Tangible Goods

This type of quote is traditionally used for tangible goods. It shows the quantities ordered and the price negotiated for sale.

[Your Company Name] [Your company logo]			QUOTE		
[Street Address] [City, State, ZIP Code] [Phone Number] [Email Address]		QUOTE #: [111] Date: 1/9/23 Payment Terms: NET45 [Name] [Company Name] [Street Address] [City, State, ZiP Code] [Phone Number] [Email Address]			
Bill To: [Name] [Company Name] [Street Address] [City, State, ZiP Code] [Phone Number] [Email Address]					
Description	Quantity	Unit Price	Line Total		
Widget	1	\$0.00	\$0.00		
		Subtotal			
		Sales Tax			
		Shipping & Handling			
		TOTAL			
Make all checks payables to [Your Comp If you have any questions concerning th	any Name] Is quote, please contact [N	lame, Phone Number, I	E-mail]		
	Thank you for y				

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### **Sample Forms**

### Sample Form #2: Hourly or Professional Services

This quote layout is traditionally used to quote for services rather than goods. This quote has a place to indicate hours and services performed, the billing rate of your services and the total amount due. For services rendered, it is particularly important that you provide a detailed description of the services provided, the goals accomplished, the date and location of where services will be performed and hours billed.

Note: To comply with the State of California's backup withholding requirement, you should also indicate whether or not the services were performed within the State of California or outside the state of California/Internationally.

[Your Company Name] [Your company logo] [Street Address]			QUO <sup>-</sup>	
[City, state, ZIP Code] [Phone Number] [Email Address]	QUOTE *: [11] Date: 1/9/2 Payment Terms: NET4 [Name] [Company Name] [Street Address] [City, State, ZIP Code] [Phone Number] [Email Address]			
Bill To: [Name] [Company Name] [Street Address] [City, State, ZIP Code] [Phone Number] [Email Address]				
Description	Hours	Rate	Amount	
Widget	1	\$0.00	\$	
	P	TOTAL		
Make all checks payables to [Your Company Name] If you have any questions concerning this quote, ple	ase contact [I		E-mail]	
Thar	nk you for y	our business!		

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