	<b>CALIFORNIA RESOURCES CORPORATION AND ITS AFFILIATES (COLLECTIVELY, CRC)</b>	
	<b>User Guide – Quote Request for Quotation (RFQ)</b>	Version 1.0 December 1, 2014

## OVERVIEW

This User Guide describes how Suppliers participates in Request for Quotation (RFQ) events.

## HOW TO USE THIS USER GUIDE

**If familiar with the iSupplier Portal Functionalities and the CRC processes, refer to the One-Page Quick Reference (Cheat sheet) on page 2.** Otherwise, review the Process Overview section to better understand the processes. Next, review the Content/Checklist section, as this section lists the required and optional steps for each of the processes. Last, complete the required steps according to the detailed written instructions which follow the numbering sequence shown in the screenshots for how each of the tasks shall be executed.

When completing the steps in the iSupplier Portal, you may refer to the Content/Checklist column to validate that the required steps have been completed. In addition, this User Guide provides high-lighted and / or framed notes, tips and important messages to assist you in some tasks.


## PROCESS OVERVIEW

A request for quotation (RFQ) is a document which requests Suppliers to provide a quote for specific materials and/or services by a certain due date and in accordance with specific technical and/or commercial Terms and Conditions.

If CRC invites a Supplier to participate in an RFQ event, the specific Supplier Contact selected by CRC will receive an automatic email notification (Sender: "CRC – Notification") requesting that they access the iSupplier Portal and view, acknowledge and respond to the RFQ.

First, the Supplier must acknowledge whether or not they will be participating in the RFQ. The next step is to create a quote by the due date to respond to the RFQ. During this process, Supplier may make inquiries or request clarifications regarding the RFQ, the CRC Buyer change the requirements of the RFQ through online discussions, amendments and/or new rounds. Finally, Suppliers must submit quotes in compliance with all the requirements and/or attachments demanded by CRC.

<p><b>IMPORTANT:</b> Please note that an invitation to RFQ events does not imply a contract, or intent to purchase goods or services from a Supplier by CRC.</p>
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## QUICK REFERENCE (CHEAT SHEET)

### 1. Receive an Email Notification as an Invitation to Participate in an RFQ Event

- In the email notification, click on the “**Negotiation Details**” hyperlink to be directed to the RFQ.

### 2. Login to the iSupplier Portal

**IMPORTANT:** If you had accessed the iSupplier Portal from the hyperlink in an email notification go to step 4. Otherwise, continue with the next step.

- If applicable, in the “**Main Menu**” panel click on the “**Supplier User – Transactions**” responsibility.
- From the “**Home**” page, click on the “**Negotiations**” tab.

### 3. Search for the RFQ

- In your “**Company’s Open Invitations**” section, click on the applicable RFQ Number under the “**Negotiation Number**” column.
- Alternatively, in the “**Search Open Negotiations**” section search by the RFQ number, title, etc.

### 4. Review the RFQ Before Acknowledging Participation and Quoting

- Review all the sections in the “**Header**” tab.
- Scroll down to the “**Notes and Attachments**” section, click on every file name hyperlink in the “**Title**” column to download the attached document.
- As needed, select the option “**Printable View**” from the “**Actions**” dropdown menu and click on the “**Go**” button to view, save and print the RFQ.
- Click on the “**Lines**” tab to review products and/or services and the quantities requested in the RFQ.
- Click on the “**Controls**” tab to review the scheduled start and close dates to respond to the RFQ, and the response rules.
- Click on the “**Contract Terms**” tab. Click on the “**Preview Contract Terms**” button to view, save and print the Terms and Conditions.
  - In the “**Deliverables**” section, access a specific deliverable by clicking on the “**Deliverable Name**” hyperlink.
- As needed, select the option “**Online Discussions**” from the “**Actions**” dropdown menu to request additional information and clarify any issues regarding the RFQ. This replaces any email communication.

### 5. Acknowledge Participation in the RFQ Event.

- Select the option “**Acknowledge Participation**” from the “**Actions**” dropdown menu, and then click the “**Go**” button.
- Click on the “**Yes**” button to indicate participation in the RFQ.
- Click on the “**Apply**” button.

### 6. Create Quote

- After reviewing and printing the document, select the option “**Create Quote**” from the “**Actions**” dropdown menu, and then click on the “**Go**” button.
- In the “**Quote Valid Until**” field, click on the “**Calendar**” icon to select the date to indicate how long the quote will be valid.
- If applicable, choose the appropriate currency from the “**Quote Currency**” dropdown menu.
- In the “**Requirements**” section, respond to each requirement by entering the appropriate response values.
- As needed, attach any appropriate support documentation to the response in the “**Attachment**” section by clicking on the “**Add Attachment**” button.
- As needed, scroll down to the “**Deliverables**” section and respond to deliverables requesting specific documentation.
  - Respond to the deliverable by clicking the “**Pencil**” icon in the “**Update**” column.
- Click on the “**Save Draft**” button to save the information you have provided so far.
- Click on the “**Line**” tab. For each line:
  - In the “**Quote Price**” column enter price for the quote.
  - If applicable, in the “**Quote Quantity**” column, enter the item quantity.
  - In the “**Promised Date**” column, click on the calendar icon to select the date.
  - Click on the update “**Pencil**” icon to respond to the line level attributes, add cost factors or specific attachments. Enter the line item detailed information, and then click on the “**Apply**” button.

### 7. Validate and Submit the Quote

- To review the quote before submitting it, click on the “**View RFQ**” button.
- To save a draft response, click on the “**Save Draft**” button.
- Click on the “**Continue**” button.
- Click on the “**Validate**” button to verify the quote before submitting it.
- Click on the “**Submit**” button. A confirmation message will be displayed indicating that the RFQ has been submitted.

During the Negotiation process, Suppliers can receive email notifications for the following events:

- Reminders
- Extended close date of the RFQ
- Paused of the RFQ
- Early Close of the RFQ
- Amended RFQ
- New Rounds



CONTENT / CHECK LIST

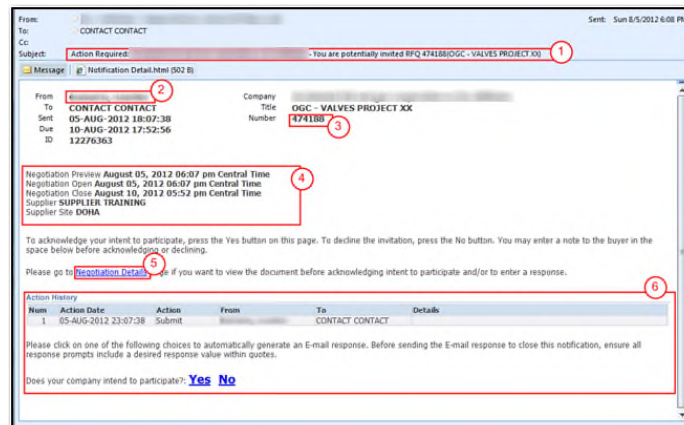
Steps	Page No	Required	Check
1. <a href="#">Receive Email Notification to Participate an RFQ event</a>	4	Required	<input type="checkbox"/>
2. <a href="#">Access the iSupplier Portal</a>	5	Required	<input type="checkbox"/>
3. <a href="#">Search for the RFQ</a>	6	Required	<input type="checkbox"/>
4. <a href="#">Review the RFQ</a>	7	Required	<input type="checkbox"/>
4.1. <a href="#">Review the RFQ Header Tab</a>	8	Required	<input type="checkbox"/>
4.2. <a href="#">Review the RFQ Lines tab</a>	9	Required	<input type="checkbox"/>
4.3. <a href="#">Review the RFQ Controls tab</a>	10	Required	<input type="checkbox"/>
4.4. <a href="#">Review the RFQ Contract Terms Tab</a>	11	Required	<input type="checkbox"/>
4.5. <a href="#">Print RFQ Details</a>	11	Optional	
5. <a href="#">Acknowledge Participation</a>	12	Required	<input type="checkbox"/>
6. <a href="#">Create a Quote</a>	13	Required	<input type="checkbox"/>
6.1. <a href="#">Complete the RFQ Header Tab</a>	13	Required	<input type="checkbox"/>
6.2. <a href="#">Complete the Requirement Section</a>	14	Optional	
6.3. <a href="#">Add Attachments</a>	15	Optional	
6.4. <a href="#">Submit Deliverables</a>	17	Optional	
6.5. <a href="#">Complete the Lines tab – Quote RFQ</a>	19	Required	<input type="checkbox"/>
6.5.1. <a href="#">Complete the RFQ Line Details</a>	20	Required	<input type="checkbox"/>
7. <a href="#">Validate and Submit the RFQ</a>	21	Required	<input type="checkbox"/>
8. <a href="#">Administrate the RFQ and Quotes</a>	22	Optional	
8.1. <a href="#">Navigate through the Negotiations Tab</a>	22	Optional	
8.2. <a href="#">Quote by Spreadsheet</a>	24	Optional	
8.3. <a href="#">Receive and Address RFQ Additional Event Notifications</a>	27	Optional	
▶ <a href="#">Extend RFQ</a>	27	Optional	
▶ <a href="#">Paused RFQ</a>	27	Optional	
▶ <a href="#">Resume RFQ</a>	27	Optional	
▶ <a href="#">Early or Scheduled Close RFQ</a>	27	Optional	
▶ <a href="#">New RFQ Round</a>	27	Optional	
8.3.1. <a href="#">Manage Amended RFQ</a>	28	Optional	
8.4. <a href="#">Online Discussions (Inquires, clarifications, etc)</a>	29	Optional	
8.4.1. <a href="#">View Sent Online Discussion Attachments</a>	30	Optional	
8.5. <a href="#">Manage Draft Responses</a>	32	Optional	
8.6. <a href="#">Manage Deliverables</a>	33	Optional	
8.7. <a href="#">View Quote History</a>	34	Optional	

## INSTRUCTIONS

### 1. RECEIVE EMAIL NOTIFICATION TO PARTICIPATE IN AN RFQ

When CRC invites a Supplier to participate in an RFQ event, an automatic email notification is sent to the specific Supplier contact selected by the CRC Buyer. The notification shows the following information.

**Note:** The email sender will be “CRC – Notification”. The notification shows the following information.



- ( 1 ) The email “**Subject**” shows the number and title of the RFQ as well as the required action(s) to complete.
- ( 2 ) The “**From**” field, identifies the CRC contact who initiated this event. As needed, contact this person for clarification of any of the RFQ information.
- ( 3 ) The “**Number**” field shows CRC’s internal “**RFQ Number**”. Save this number to use when performing a search for the document in the iSupplier Portal.
- ( 4 ) The “**Summary**” section shows the following information.

Field	Description
Negotiation Preview	Scheduled start date to allow the Supplier to view the RFQ content. No RFQ access before this date and time.
Negotiation Open	Scheduled start date to respond to RFQ. No quotes are allowed before this date and time.
Negotiation Close	Scheduled close date to respond to RFQ. No quotes are allowed after this date and time.
Supplier	Supplier’s name
Supplier Site	CRC Internal identification of a Supplier’s office/location.

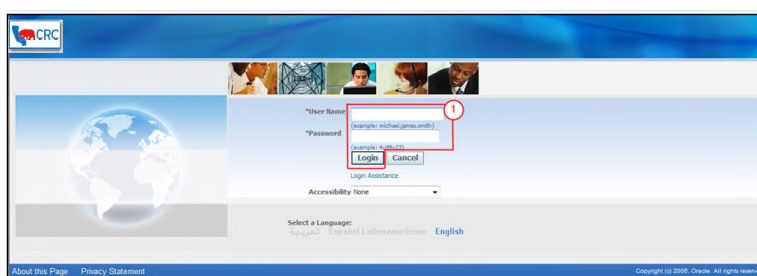
- ( 5 ) Click on the “**Negotiation Details**” hyperlink to access the iSupplier Portal. Within the portal you will be taken automatically to the RFQ screen. For further instructions on how to review the RFQ, see section [4. – Review the RFQ](#).
- ( 6 ) **DO NOT** click on the “**Actions**” buttons on the notifications (The functionality is disabled). To accept or reject the invitation to participate, access to the RFQ within the iSupplier Portal.

**IMPORTANT:** Suppliers who are not registered with CRC (Prospective Supplier) invited to an RFQ receive

a different notification. They cannot view, acknowledge nor respond to the RFQ until they have completed the registration and pre-qualification process and have been granted access to the iSupplier Portal.

## 2. ACCESS THE ISUPPLIER PORTAL

Login to the iSupplier Portal at: [https://supplier.californiaresources.com/OA\\_HTML/AppsLogin](https://supplier.californiaresources.com/OA_HTML/AppsLogin)

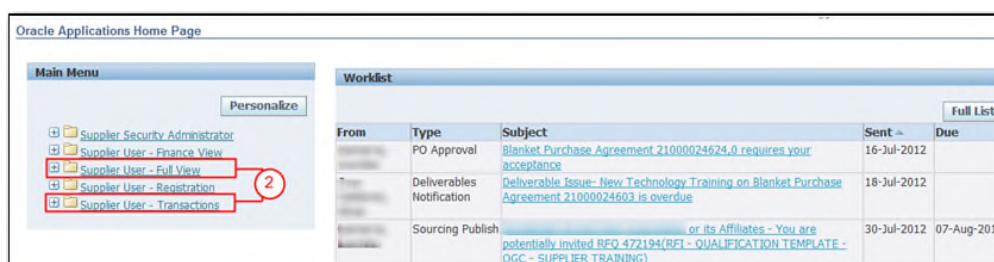


( 1 ) Enter your Username and Password and click on the “**Login**” button.

**Note:** The “**Password**” field is case sensitive. If there is a problem accessing to the iSupplier Portal, click at the “**Login Assistance**” hyperlink. Alternatively, view the [User Guide – Overview Access and Passwords, Navigation, Notification](#)

After logging in to the portal, the “**Oracle Application Home Page**” will be displayed if more than one responsibility is assigned to the user. If the user only has one responsibility the “**Home**” tab screen for that responsibility will automatically be displayed.

**Note:** If you had accessed the portal through the hyperlink in the email notification, you will automatically be taken to the RFQ screen.



( 2 ) To access and view the invitation, click on one of the following responsibilities.

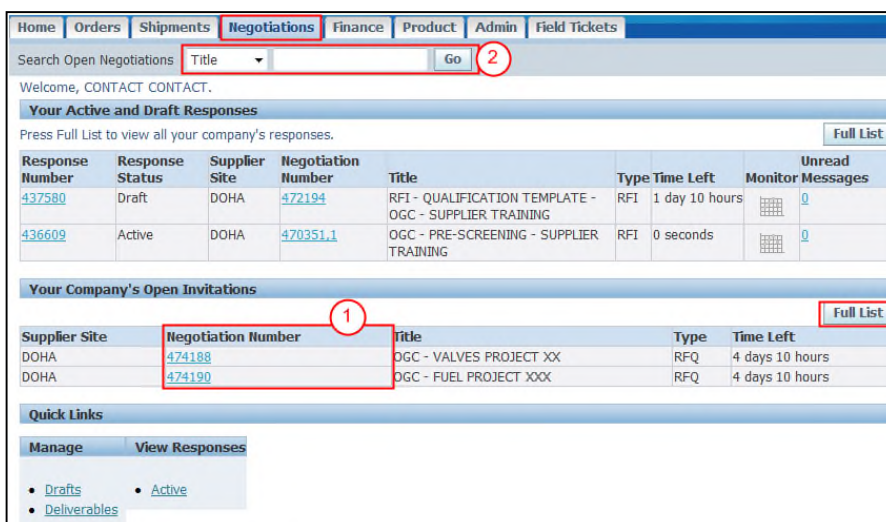
Needed Responsibility	Supplier Action
Supplier User – Transactions	<ul style="list-style-type: none"> <li>View and Respond to a RFQ.</li> </ul>
Supplier User – Full View	<ul style="list-style-type: none"> <li>Only View RFQs.</li> </ul>

Once in the required responsibility, the “**Home**” tab screen will then be displayed. Click on the “**Negotiations**” tab to see your RFQ events.

**Note:** If none of these responsibilities have been assigned to you, contact the iSupplier Portal Security Administrator within your company to request them. Go to the [User Guide – Overview – Access and Passwords, Navigation and Notifications](#) to learn how to view the list of your company contacts and iSupplier Users.

### 3. SEARCH FOR THE RFQ

In the **“Negotiations”** tab, all the RFQs which your company has been invited to participate in and you have not yet submitted or created a draft quotation will appear in the **“Your Company’s Open Invitations”** section.



(1) Click on the applicable **“Negotiation Number”** hyperlink (RFQ number) in the **“Your Company’s Open Invitations”** section, to view, acknowledge or quote an RFQ.

**Note:** View all open invitations by clicking on the **“Full List”** button.

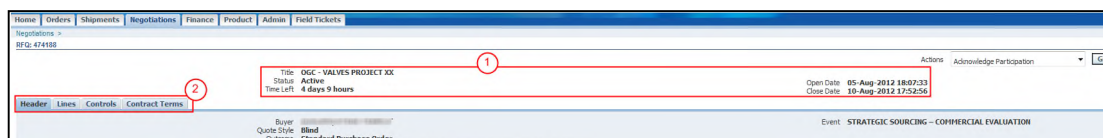
(2) Alternatively, in the **“Search Open Negotiations”** section search by the RFQ number, title, contact, event, line or category. Select the search criteria from the dropdown menu, enter the respective value and click on the **“Go”** button.

**Note:** For further information about the **“Negotiations”** tab, see section [8.1. - Navigate through the Negotiations tab](#)

#### 4. REVIEW THE RFQ

Review the RFQ before acknowledging participation and responding to it. The RFQ screen shows the following information.

**Note:** For further instructions on how to search a RFQ, see section [3. - Search for the RFQ](#)



**IMPORTANT:** Carefully review all RFQ sections, tabs and information to clearly understand the document scope and purpose. To print the document, see section [3.5. - Print RFQ Details](#). If additional clarification is needed, use the Online Discussion functionality (See the section [8.4. - Online Discussions](#)) to correspond with CRC personnel.

(1) The “RFQ Main Information” section shows the following information.

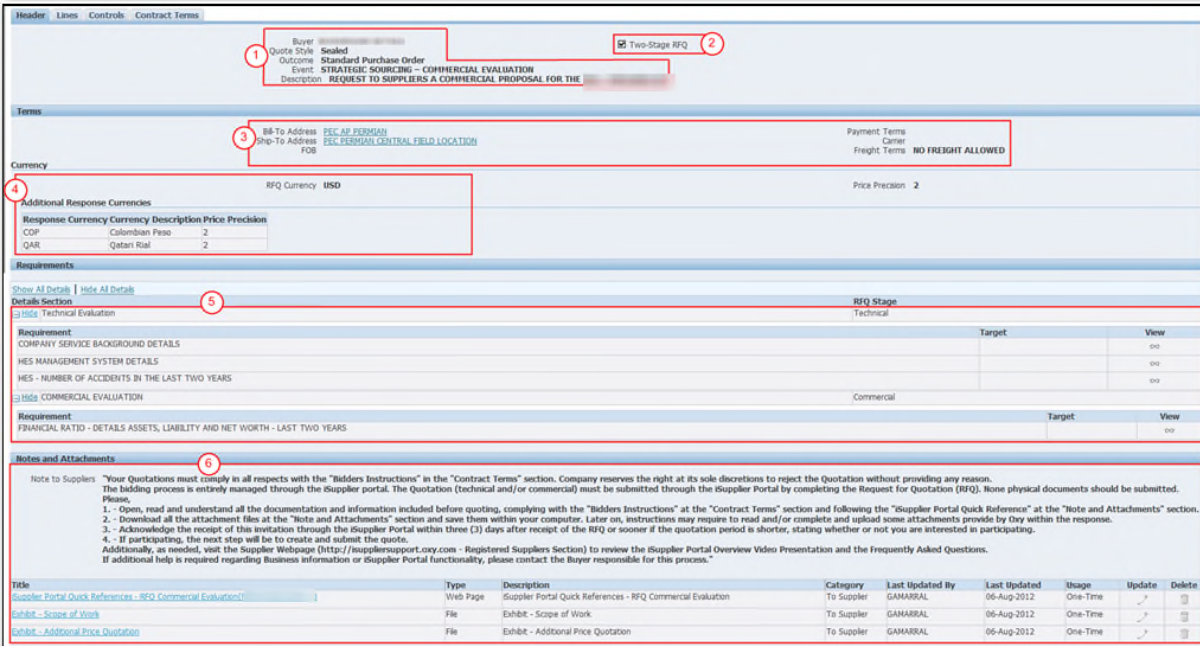
Field	Description
Title	RFQ Title
Status	RFQ Status: <ul style="list-style-type: none"> <li>Active: Event opened to receive Supplier responses.</li> <li>Closed: Event closed to receive Supplier responses.</li> <li>Cancelled: Event cancelled by CRC.</li> <li>Amended: Event amended and closed to receive Supplier responses. A new RFQ revision has been published. Continue the process in the new revised RFQ.</li> <li>Round Completed: Event closed to receive Supplier responses. A new RFQ round related to this event is published. Continue the process in the new round RFQ.</li> </ul>
Time Left	Remaining time to submit a response to the RFQ
Open Date	Scheduled start date to respond to the RFQ. No responses are allowed before this date and time.
Close Date	Scheduled close date to respond to the RFQ. No quotes are allowed after this date and time.

(2) Click on each “Tab” to view the details of the RFQ. The tabs show the following information.

Tab	Description
Header	Document general information such as Terms, Requirements, Notes and Attachments.
Lines	Displays product or services information.
Control	Open/Close date and key response rules.
Contract Terms	Specific Terms and Conditions applicable to the document.

#### 4.1. REVIEW THE RFQ HEADER TAB

Click on the **“Header”** tab to review the RFQ general information, terms, requirements and attachments. This section shows the following information.



The screenshot shows the RFQ Header tab with the following sections and highlighted elements:

- Header:** Buyer: Sealed, Two-Stage RFQ. Quote Style: Standard Purchase Order. Event: STRATEGIC SOURCING - COMMERCIAL EVALUATION. Description: REQUEST TO SUPPLIERS A COMMERCIAL PROPOSAL FOR THE...
- Terms:** B2B Address: FSC AP PERMAN, Ship-To Address: FSC PERMAN CENTRAL FIELD LOCATION. Payment Terms: Carrier, Freight Terms: NO FREIGHT ALLOWED.
- Currency:** RFQ Currency: USD. Price Precision: 2.
- Additional Response Currencies:** Table with columns: Response Currency, Currency Description, Price Precision. Rows: COP (Colombian Peso), QAR (Qatar Real).
- Requirements:** Table with columns: Requirement, RFQ Stage, Target, View. Rows include COMPANY SERVICE BACKGROUND DETAILS, HES MANAGEMENT SYSTEM DETAILS, HES - NUMBER OF ACCIDENTS IN THE LAST TWO YEARS, and FINANCIAL RATIO - DETAILS ASSETS, LIABILITY AND NET WORTH - LAST TWO YEARS.
- Notes and Attachments:** Note to Suppliers: "Your Quotations must comply in all respects with the 'Bidders Instructions' in the 'Contract Terms' section..." Attachments table with columns: Title, Type, Description, Category, Last Updated By, Last Updated, Usage, Update, Delete.

- (1) The **“Top”** section displays the basic information of the document such as the Buyer name (responsible CRC employee), the event and its description.
- (2) If the **“Two- Stage RFQ”** checkbox is checked, the RFQ is a sealed bid two stage process, which means that the technical and commercial proposals will be evaluated separately.
- (3) The **“Terms”** section displays additional information related to shipping, billing, RFQ currency, etc.
- (4) If applicable, the **“Additional Response currencies”** section will be shown indicating the different currency quotations allowed.
- (5) The **“Requirement”** section has required information to be included within your quote. Click on the **“Show all Details”** hyperlink to reveal all the requirements that CRC has included in the sourcing event.
- (6) The **“Note and Attachments”** section shows the **“Note to Supplier”** field with additional instructions and attached documents related to the RFQ. To download a file attachment, click on the **“Title”** hyperlink.

**IMPORTANT:** Read the **“Note to Supplier”** field, and then download the **“Attachments”**. In some cases, the attachments are templates (i.e. quotation spreadsheet template) that must be completed and submitted with the quotations as attachments.



## 4.2. REVIEW THE RFQ LINES TAB

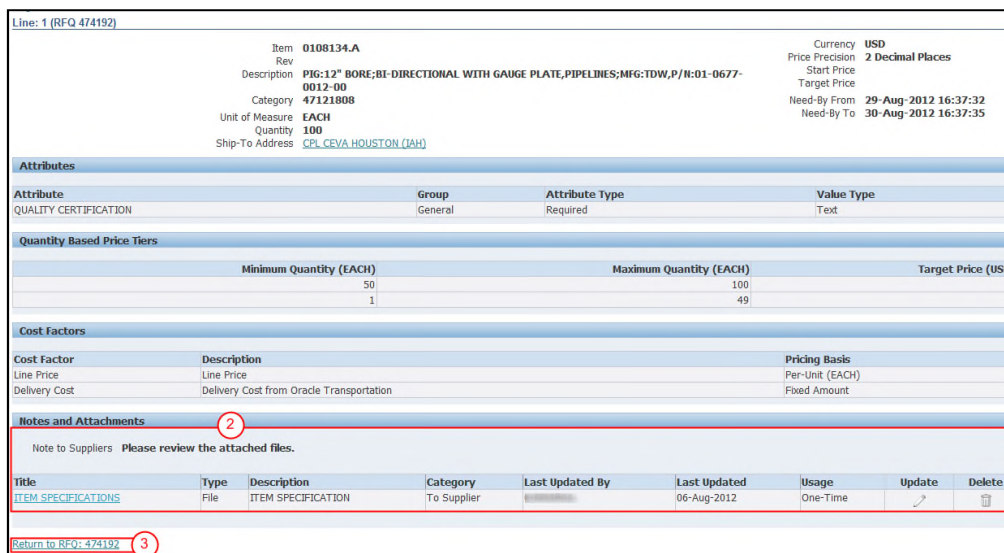
The “Lines” tab shows the products or services, and the quantities requested in the RFQ.



Line	Item_Rev	Category	Unit	Quantity	Need-By From	Need-By To	Best Price (USD)	Active Responses	Time Left
1	0108134.A	47121808	EACH	100	29-Aug-2012 16:37:32	30-Aug-2012 16:37:35	Sealed	Sealed	21 days 22 hours

- (1) Click in the “Line” description link to see detailed line information such as CRC’s internal item description, required item/services attributes, additional notes and attachments that were included by the Buyer.

**Note:** Attributes, cost factors and price breaks are optional sections that will appear in the screen if they were previously defined by the Buyer.



Line: 1 (RFQ 474192)

Item	0108134.A	Currency	USD
Rev		Price Precision	2 Decimal Places
Description	PIG:12" BORE;BI-DIRECTIONAL WITH GAUGE PLATE,PIPELINES;MFG:TDW,P/N:01-0677-	Start Price	
	0012-00	Target Price	
Category	47121808	Need-By From	29-Aug-2012 16:37:32
Unit of Measure	EACH	Need-By To	30-Aug-2012 16:37:35
Quantity	100		
Ship-To Address	CPL CEVA HOUSTON (IAH)		

Attribute	Group	Attribute Type	Value Type
QUALITY CERTIFICATION	General	Required	Text

Minimum Quantity (EACH)	Maximum Quantity (EACH)	Target Price (USD)
50	100	
1	49	

Cost Factor	Description	Pricing Basis
Line Price	Line Price	Per-Unit (EACH)
Delivery Cost	Delivery Cost from Oracle Transportation	Fixed Amount

Note to Suppliers: Please review the attached files.

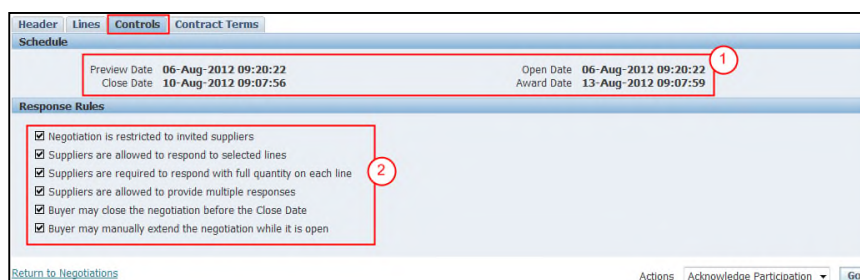
Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
<a href="#">ITEM SPECIFICATIONS</a>	File	ITEM SPECIFICATION	To Supplier		06-Aug-2012	One-Time		

[Return to RFQ: 474192](#)

- (2) If applicable, review any attachment and note in the “Notes and Attachments” section. Attachments can contain additional instructions or information related to the line quote (i.e. the Buyer may request item specifications, blueprints, additional price list, etc). To download a file attachment, click on the “Title” hyperlink. A pop - up screen will be displayed requiring you to open or save the document.
- (3) Click on the “Return to RFQ” link to return to the previous page.

### 4.3. REVIEW THE RFQ CONTROLS TAB

The “**Controls**” tab shows response rules of the RFQ as well as important dates to consider when creating a quote.



( 1 ) The “**Schedule**” section shows the following dates.

Date	Description
Preview Date	Scheduled start date to allow the Supplier to view the RFQ content. No RFQ access before this date and time.
Open Date	Scheduled start date to respond to the RFQ. No quotes are allowed before this date and time
Close Date	Scheduled close date to respond to the RFQ. No quotes are allowed after this date and time.
Award Date	Scheduled date to receive the award.

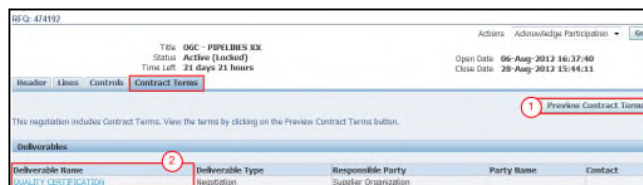
**IMPORTANT:** Make sure to submit the quote by the RFQ close date.

( 2 ) The “**Response Rules**” section shows the following rules assigned by the CRC Buyer.

Rules	Description
Negotiation is restricted to invited Suppliers	Only the Supplier explicitly invited to the RFQ can view and participate in the event.
Suppliers are allowed to respond to selected lines	If this rule is checked, Supplier can select which line to quote. Otherwise, Supplier must quote all lines.
Suppliers are require to respond with full quantity on each line	If this rule is checked, Supplier must quote the prices for the full quantity requested. Otherwise, Supplier can quote the price for a partial quantity.
Suppliers are allowed to provide multiple responses	If this rule is checked, Supplier can provide as many quotes as needed. Any new quote submitted by a User will replace the previous one. If this rule is not checked Supplier can only quote once. If this is the case, validate the quote closely before submitting it. No corrections are allowed.
Buyer may close the negotiation before the Close Date	CRC Buyer can early close the event.
Buyer may manually extend the negotiation while it is open	As needed, CRC Buyer can extend an open event by setting a new close date beyond the original close date.

#### 4.4. REVIEW THE RFQ CONTRACT TERMS TAB

The **“Contracts Terms”** tab shows the negotiation Terms and Conditions as well as any deliverable(s) required by the Buyer. In this section, Suppliers can open and save these documents to their computer.



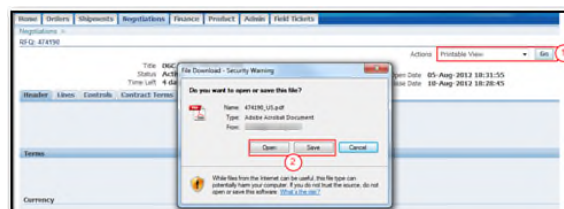
- (1) Click on the **“Preview Contract Terms”** button to view, save and print the Terms and Conditions.  
**Note:** A **“Pop-Up”** screen will be displayed. You can either click on the **“Open”** button to view the PDF file and print it using the Acrobat Reader, or click on the **“Save”** button to save the PDF file to your computer.
- (2) If applicable, in the **“Deliverables”** section, click on the **“Deliverable Name”** hyperlink to access a specific deliverable document.



- (3) The **“Description”** field shows instructions and the relevant information about the deliverable. For documentation, this field establishes how and what documentation/information the Supplier must submit.
- (4) View, save or print the existing attachments by clicking on the **“Attachment Name”** hyperlink in the **“Title”** column.
- (5) Return to the previous screen by clicking on the **“Return to RFQ: ...”** hyperlink.

#### 4.5. PRINT RFQ DETAILS

As needed, print the RFQ details in a formatted copy to review offline.

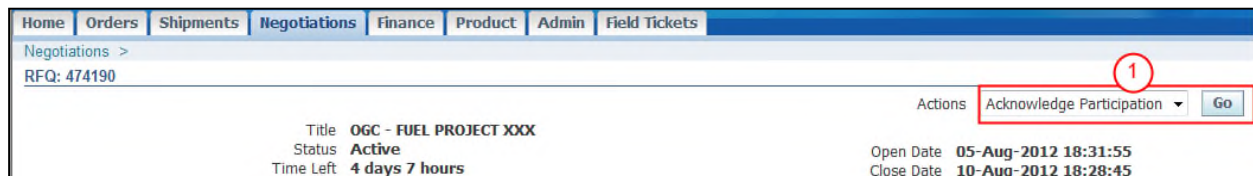


- (1) Select the **“Print View”** option from the **“Actions”** dropdown menu, and then click on the **“Go”** button. A pop-up screen will be displayed.
- (2) Click on the **“Open”** or **“Save”** button to view the PDF file and print it using the Acrobat Reader.

## 5. ACKNOWLEDGE PARTICIPATION

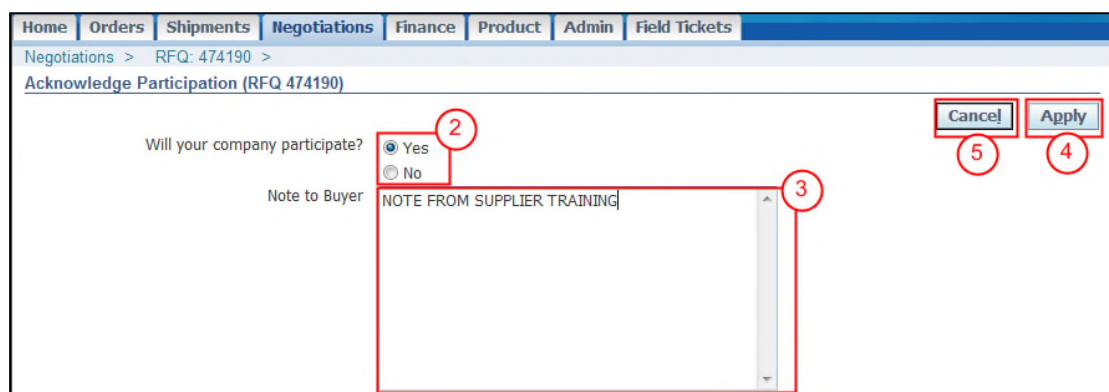
After reviewing the document and clarifying any issues, the next step is to acknowledge whether or not your company will be participating in the RFQ event. In the respective RFQ screen, acknowledge participation by following the steps outlined below.

**Note:** For further instructions on how to search for an RFQ, see section [3. - Search for the RFQ](#).



The screenshot shows the top navigation bar with 'Negotiations' selected. Below it, the RFQ ID 'RFQ: 474190' is displayed. The main content area shows the title 'OGC - FUEL PROJECT XXX', status 'Active', and time left '4 days 7 hours'. On the right, the 'Actions' dropdown menu is open, showing 'Acknowledge Participation' and a 'Go' button. A red circle with the number '1' highlights the 'Acknowledge Participation' option.

- ( 1 ) Select the option **“Acknowledge Participation”** from the **“Actions”** dropdown menu, and then click the **“Go”** button. The following screen will appear.



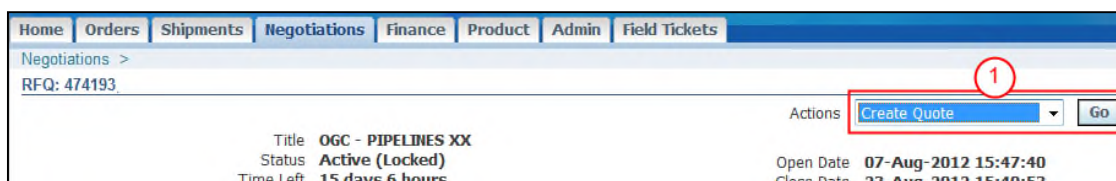
The screenshot shows the 'Acknowledge Participation (RFQ 474190)' screen. It features a question 'Will your company participate?' with radio buttons for 'Yes' (selected) and 'No'. A red circle with the number '2' highlights the 'Yes' radio button. Below the question is a 'Note to Buyer' text area containing the text 'NOTE FROM SUPPLIER TRAINING'. A red circle with the number '3' highlights the text area. In the top right corner, there are 'Cancel' and 'Apply' buttons. Red circles with numbers '4' and '5' highlight the 'Apply' and 'Cancel' buttons, respectively.

- ( 2 ) Next to the **“Will your company participate?”** question, check the appropriate radio button.
- ( 3 ) If necessary, in the **“Note to Buyer”** textbox, send a message to the CRC Buyer (CRC employee responsible for the event).
- ( 4 ) Click on the **“Apply”** button.
- ( 5 ) Optionally, return to the previous screen by clicking on the **“Cancel”** button.

## 6. CREATE A QUOTE

After acknowledging participation in the RFQ event, the next step is to prepare and submit your quote in the respective RFQ screen.

**Note:** For further instructions on how to search an RFQ, see section [3. - Search for the RFQ](#).



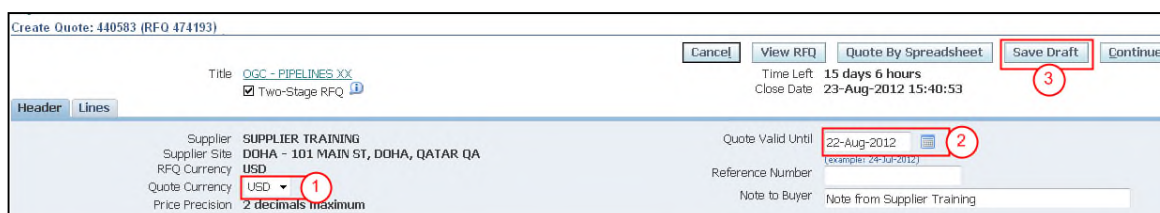
The screenshot shows the 'Negotiations' tab selected in the top navigation bar. Below it, the RFQ ID '474193' is displayed. The main content area shows details for the RFQ: Title 'OGC - PIPELINES XX', Status 'Active (Locked)', and Time Left '15 days 6 hours'. On the right side, there is an 'Actions' dropdown menu with 'Create Quote' selected, and a 'Go' button next to it. A red circle with the number '1' is placed over the 'Create Quote' button.

- (1) Select the option “**Create Quote**” from the “**Actions**” dropdown menu, and then click on the “**Go**” button. The “**Create Quote**” screen will appear with all the requirements field expanded.

**IMPORTANT:** It is critical to complete and submit all the required data and documents found in the “**Notes and Attachments**” or “**Deliverables**” section. Ensure all the required quotation template attachments are completed and ready to be uploaded with the quote.

**Note:** As needed, download the RFQ document in an Excel spreadsheet to complete the quotation offline, and then upload the completed spreadsheet to the iSupplier Portal. (See Section [8.2. - Quote by Spreadsheet](#))

### 6.1. COMPLETE THE RFQ HEADER TAB



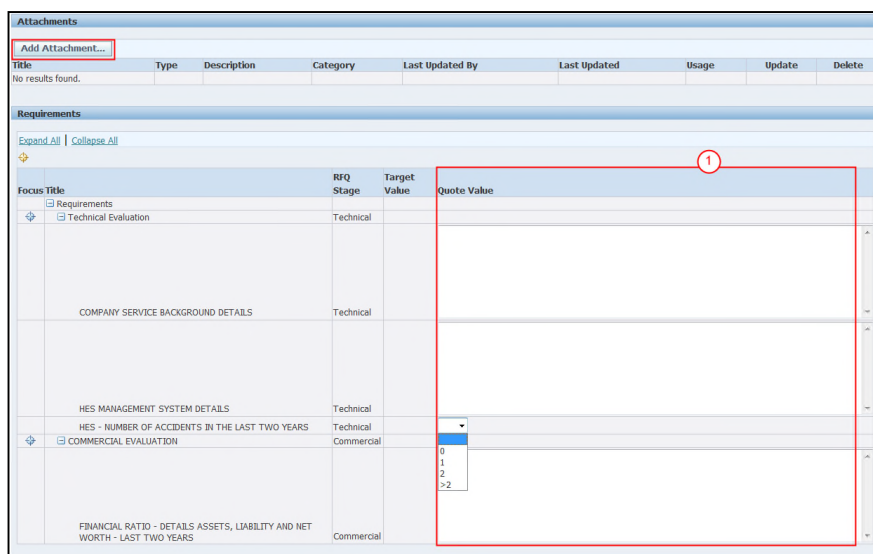
The screenshot shows the 'Create Quote' screen for RFQ 440583. The 'Header' tab is selected. The form contains several fields: Title 'OGC - PIPELINES XX', Supplier 'SUPPLIER TRAINING', Supplier Site 'DOHA - 101 MAIN ST, DOHA, QATAR QA', RFQ Currency 'USD', and Price Precision '2 decimals maximum'. The 'Quote Valid Until' field is set to '22-Aug-2012'. The 'Save Draft' button is highlighted with a red circle and the number '3'. The 'Quote Currency' dropdown menu is highlighted with a red circle and the number '1'. The 'Quote Valid Until' field is highlighted with a red circle and the number '2'.

- (1) If applicable, choose the appropriate currency from the “**Quote Currency**” dropdown menu. This currency will be used for the entire quotation.  
**Note:** The Buyer defines this option. If the Buyer does not set up different currency choices, this option will not be available.
- (2) As needed, in the “**Quote Valid Until**” field, click on the “**Calendar**” icon to select the date indicating how long the quote will be valid. Do not populate this field if the quote is valid until the RFQ is completed by CRC.
- (3) As needed, click on the “**Save Draft**” button to save the information you have provided so far. For instructions on how to access saved quotes, see section [8.5. - Manage Draft Responses](#).

## 6.2. COMPLETE THE REQUIREMENT SECTION

If the Requirements section is shown, respond to each requirement.

**IMPORTANT:** Only for the **Two- Stage RFQ** - The requirement section will be used to collect both technical and commercial information from the Supplier to facilitate the evaluation process. However the information will be evaluated separately. Make sure to provide the correct information in the appropriate fields. Do not provide price information in technical evaluation related fields or attachments. CRC Buyer will not be allowed to see Commercial Requirements answers until the technical evaluation has been completed.



Focus Title	RFQ Stage	Target Value	Quote Value
Requirements			
Technical Evaluation	Technical		
COMPANY SERVICE BACKGROUND DETAILS	Technical		
HES MANAGEMENT SYSTEM DETAILS	Technical		
HES - NUMBER OF ACCIDENTS IN THE LAST TWO YEARS	Technical		
COMMERCIAL EVALUATION	Commercial		<input type="text" value="0"/> <input type="text" value="1"/> <input type="text" value="2"/> <input type="text" value="2"/>
FINANCIAL RATIO - DETAILS ASSETS, LIABILITY AND NET WORTH - LAST TWO YEARS	Commercial		

- (1) In the **“Requirements”** section, all the requirements will expand to accommodate responses. Enter the appropriate response values in each requirement field. Some of the requirements may require the Supplier to submit additional attachments. Those attachments must be included in the **“Attachments”** section of the RFQ. The following are potential types of responses that will be requested.

**Note:** You must complete all of the required fields.

Types of Requirement field Value	Data Allowed
Dropdown Menu	List of Values - Select the most suitable option
Text box	Text - Type the answer as detailed as possible
Date	Only dates, click on the <b>“Calendar”</b> icon to enter the date.
Number	Only numbers are allowed

**IMPORTANT:** Make sure to scroll down the page and respond all the requirements. When more than 100 requirements are shown within this section, the **“Previous”** and **“Next”** hyperlinks will appear. Click on these hyperlinks to respond all the requirements.

**Note:** As needed, scroll up and attach any appropriate support documentation to the response by clicking on the **“Add Attachment”** button in the **“Attachments”** section. For further information about how to add attachments, see section below [6.3. - Add Attachments](#).

### 6.3. ADD ATTACHMENTS

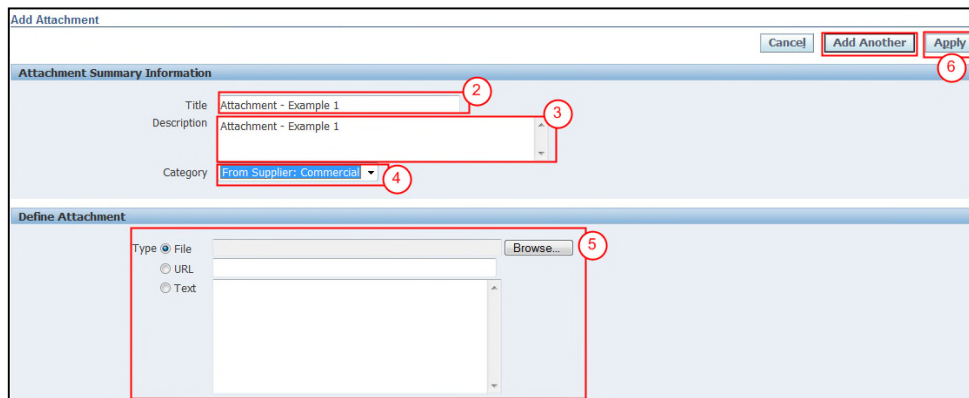
Follow these steps to attach any required or support documentation to the Quote.

**IMPORTANT:** Use this section to attach all completed required Quotation Templates (Excel documentation, Word documentation, etc.) and any support documents required in the Requirements section, and the Terms and Conditions section.



The screenshot shows the 'Header' tab of a software interface. Under the 'Attachments' section, there is a table with columns: Title, Type, Description, Category, Last Updated By, Last Updated, Usage, Update, and Delete. The 'Add Attachment...' button is circled in red with the number 1. The table currently shows 'No results found.'

(1) Click on the “Add Attachment..” button in the “Attachments” section on the “Header” tab.



The screenshot shows the 'Add Attachment' dialog box. It has two main sections: 'Attachment Summary Information' and 'Define Attachment'. In the 'Attachment Summary Information' section, the 'Title' field contains 'Attachment - Example 1' (circled 2), the 'Description' field contains 'Attachment - Example 1' (circled 3), and the 'Category' dropdown is set to 'From Supplier: Commercial' (circled 4). In the 'Define Attachment' section, the 'Type' is set to 'File' and the 'Browse...' button is circled 5. At the top right, there are 'Cancel', 'Add Another', and 'Apply' buttons, with 'Apply' circled 6.

(2) In the “Title” field, enter the file name.

(3) In the “Description” field, describe/summarize the file content as clearly as possible.

(4) This is only applicable for Two- Stage RFQ (otherwise, it is disabled). Select one of the following options from the “Category” dropdown menu to provide the information related to the appropriate evaluation. Buyer will not be allowed to see any Commercial Attachments until the technical evaluation has been completed.

Option	Description
From Supplier: Commercial	Select this option to attach Price Lists or documentation for the commercial evaluation.
From Supplier: Technical	Select this option to attach documentation for the technical evaluation.

**IMPORTANT:** Do not provide price information as a technical category attachment.

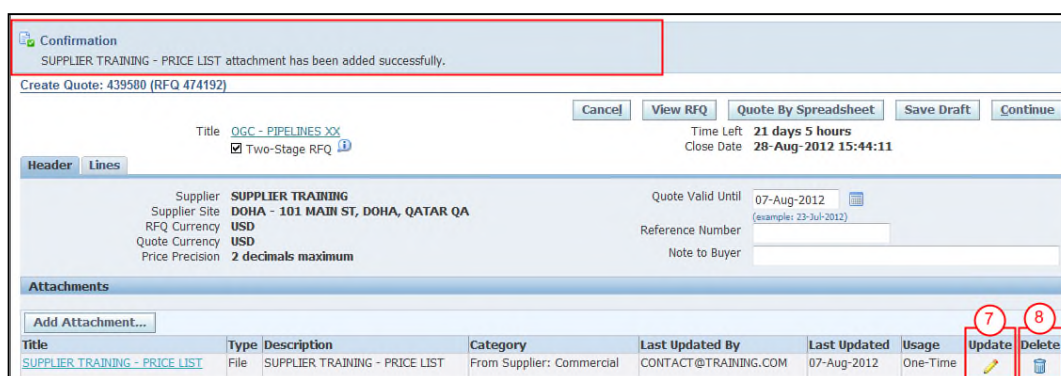
( 5 ) The “**Define Attachment**” section shows the following attachment types.

Type	Description
File	Attach a file by selecting the “ <b>File</b> ” radio button, then click on the “ <b>Browse..</b> ” button and search for the file in your computer.
URL	Attach a URL by selecting the “ <b>URL</b> ” radio button, enter (or paste) the applicable URL address (it must not be a Supplier internal webpage. CRC must be able to access it).
Text	Attach text by selecting the “ <b>Text</b> ” radio button, enter (or paste) the applicable text. This would be used to supply limited information without pictures or tables.



**Note:** As needed, click on “**Add Another**” button to continue attaching documentation by repeating the steps above. Every time an attachment is added a confirmation message will be displayed.

( 6 ) Click on the “**Apply**” button to add the attachments. A confirmation message as shown below will be displayed on the “**Create Quote**” screen to indicate that the attachment has been added.

**Note:** If you do not want to submit the attachment and you have not clicked on the “**Apply**” button, you can return to the previous screen by clicking on the “**Cancel**” button instead.



The screenshot shows a 'Confirmation' message: 'SUPPLIER TRAINING - PRICE LIST attachment has been added successfully.' Below this, the 'Create Quote: 439580 (RFQ 474192)' screen is visible. It includes a title 'OGC - PIPELINES XX', a checked 'Two-Stage RFQ' option, and buttons for 'Cancel', 'View RFQ', 'Quote By Spreadsheet', 'Save Draft', and 'Continue'. The 'Header' section shows supplier details for 'SUPPLIER TRAINING' at 'DOHA - 101 MAIN ST, DOHA, QATAR QA' with a quote valid until '07-Aug-2012'. The 'Attachments' table at the bottom lists the added file:

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
SUPPLIER TRAINING - PRICE LIST	File	SUPPLIER TRAINING - PRICE LIST	From Supplier: Commercial	CONTACT@TRAINING.COM	07-Aug-2012	One-Time		

( 7 ) As needed, update the attachment by clicking on the “**Pencil**” icon on the “**Update**” column.

( 8 ) As needed, to delete the attachment, click on the “**Trash**” icon on the “**Delete**” column.

**Note:** Repeat steps 1 through 5 to attach additional files.



#### 6.4. SUBMIT DELIVERABLES

In the “Create Response” screen, scroll down to the “Deliverables” section and respond to deliverables requesting specific documentation.

**IMPORTANT:** The “Deliverables” section will only appear if the Buyer specifically includes it as part of the RFQ. Skip the steps below if no deliverables are listed.

Deliverable Name	Due Date	Status	Alert	Update
QUALITY CERTIFICATION	06-Aug-2012	Open	⚠	

- (1) The “Deliverable Name” column shows the title of the deliverable.
- (2) Click on the “Pencil” icon in the “Update” column to submit the deliverable. The “Update Deliverable” screen will appear.

Create Quote 439580: Update Deliverable (RFQ 474192)

Deliverable Name: **QUALITY CERTIFICATION** Status: Submitted (4)



Due Date: **06-Aug-2012** Current Status: Open (5)

Description: Please download and complete the Quality Certification

Notes:

Attachments:

Add Attachment... (7)

Title	Type	Description	Last Updated By	Last Updated	Update	Delete
<a href="#">Attachment - Example 1</a> (6)	File	Attachment - Example 1	CONTACT@TRAINING.COM	06-Aug-2012		

- (3) The “Description” field gives the Supplier the instructions for completing and submitting the requested information.

**IMPORTANT:** Follow the instructions provided in the “Description” field. If instructed to submit the documentation/information through the iSupplier Portal continue with the steps described below, otherwise just follow the instructions provided within the “Description” field.

- (4) In the “Status” dropdown menu, select “Submitted”.
- (5) In the “Notes” field, explain/summarize the documentation/information provided, actions taken or to be taken, actions results, inquiries, clarifications, etc.  
**Note:** If any information is in this field, it is information/clarification provided to the Supplier, just read it and overwrites it. These changes will show up in the status history.
- (6) If files are shown, view, save or print the existing attachments by clicking on the “Attachment Name” hyperlink in the “Title” column.
- (7) Attach the required document files or upload the information/documentation by clicking on the “Add Attachment” button in the “Attachments” section. Then, the following table will appear.

**IMPORTANT:** Suppliers can only add attachments in the Deliverables section. Deletions or updates are not allowed in this section. If any mistakes are made to a file that has been attached, add the corrected file and send the CRC Buyer a request to delete the incorrect file using the “Notes” field in this section.


**OPTIONAL - ATTACH DOCUMENTATION**

**IMPORTANT:** If required to attach documents follow the steps below. Otherwise, skip these steps and go to Step 13.

- ( 8 ) In the “Title” field, enter the file name.
- ( 9 ) In the “Description” field, describe/summarize the file content as clearly as possible.
- ( 10 ) In the “Define Attachment” section, choose the appropriate type of attachment.
- ( 11 ) Click on the “Apply” button to return the specific deliverable screen or click on “Add Another” button to continue attaching documentation by repeating the steps above.

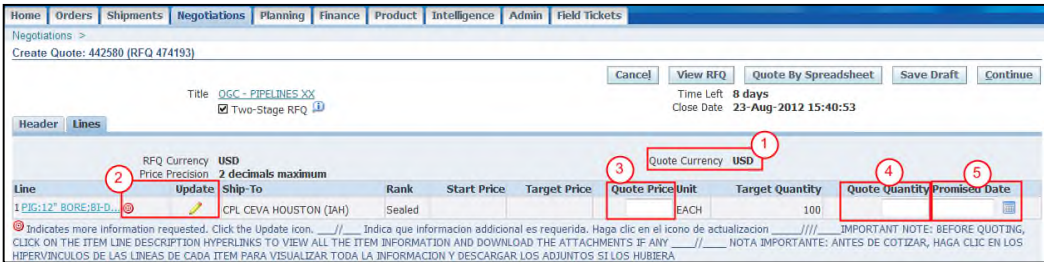
Title	Type	Description	Last Updated By	Last Updated	Update	Delete
Supplier Training - Quality Certification	Short Text	Supplier Training - Quality Certification	CONTACT@TRAINING.COM	07-Aug-2012		
Attachment - Example 1	File	Attachment - Example 1	CONTACT@TRAINING.COM	06-Aug-2012		

- ( 12 ) After attaching documentation, a confirmation message will be shown.  
**Note:** Verify that the status is “Submitted”, any notes showing are correct and attachments are listed.
- ( 13 ) Click on the “Done” button. The RFQ screen will appear and the deliverable status will be “Submitted”.

Deliverable Name	Due Date	Status	Alert	Update
QUALITY CERTIFICATION	06-Aug-2012	Submitted		


## 6.5. COMPLETE LINES TAB – QUOTE RFQ

Click on the **“Lines”** tab to enter your quote for each line on the RFQ. If you prepared your quote by spreadsheet, skip this step.



Buyer can set the RFQ **“Lines”** tab in three different ways:

Case	Supplier Action
One or several RFQ lines – Each line has a detailed description	Supplier needs to quote the specific service/material price in the <b>“Quote Price”</b> field. In addition, CRC may ask Supplier to complete a Quotation Template Spreadsheet to provide additional detailed pricing and/or cost structures. (Check the Header tab, Attachments section)
Only One RFQ line – Line: <b>“Quote Total Amount”</b>	Supplier needs to quote the lump sum or total price in the <b>“Quote Price”</b> field. In addition, CRC may ask Supplier to complete a Quotation Template Spreadsheet to provide detailed pricing and/or cost structures. (Check the Header tab, Attachments section).
Only One RFQ line – Line: <b>“Quote \$1”</b>	Use for complex pricing quotation. Supplier must quote with a <b>“1”</b> in the <b>“Quote Price”</b> field. In addition, CRC asks Supplier to complete a Quotation Template Spreadsheet to provide detailed pricing and/or cost structures. (Check the Header tab, Attachments section).

- (1) Verify that the Quote Currency is correct, otherwise click on the **“Header”** tab and select the currency as shown above in the section [6.1. - Complete the RFQ Header](#)
- (2) If the **“Red”** circle  is displayed in the item description, the Buyer has required additional information for that item and the quote cannot be submitted without providing requested information. Click on the update **“Pencil”** icon in each line to respond to the line level attributes, add cost factors or specific attachments. For further instructions about entering RFQ line details see section [6.5.1. - Complete the RFQ Line Details](#) . Otherwise continue with the next steps.
- (3) If applicable, in the **“Quote Price”** column, enter prices for each line of the RFQ.
- (4) As needed, in the **“Quote Quantity”** column, enter the quantity for the item listed.
- (5) Click on the calendar icon to complete the **“Promised Date”** field.



### 6.5.1. COMPLETE THE RFQ LINES DETAILS

Access this screen by clicking on the update “Pencil” icon that appears next to the line item. In this screen enter the information for the line item and any additional documentation required by the Buyer. Each line item may require different details to be provided.

The screenshot shows the 'Create Quote' interface for Line 1 (RFQ-474192). The description is '3/4\"

- (1) Enter an item quantity in the “Quote Quantity” field. The Quote Quantity must be equal to or less than the Target Quantity.
  - (2) The “Promised Date” is defaulted to the CRC ‘Need-By Date’. If the Promised Date will be a different date, enter the specific “Promised Date” by clicking on the calendar icon and selecting the appropriate date.
  - (3) Click on the “Add Attachments” button to attach any appropriate support documentation related to the line items as it was required by the Buyer. Refer to section [4.2. - Review the RFQ Lines Tab](#) for further information.  
**Note:** For further instructions on how to add attachments, see section [6.3. - Add Attachments](#)
  - (4) As needed, enter a note to the CRC Buyer in the “Note to Buyer” field.
- “Attributes”, “Cost Factors” and “Quantities Based Price Tiers” Sections are shown only if the CRC Buyer has included them in the RFQ line. Otherwise, they will not be displayed in the screen.

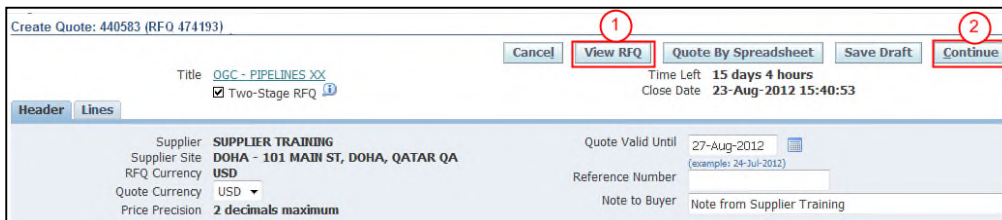
- (5) In the “Attribute” section, enter your response to any attribute in the “Quote Value” field.
- (6) If applicable, in the “Cost Factor” section, enter the “Quote Value” for all the cost factors fields. If there are no cost factors to quote, you are still required to populate this field with a “0”.
- (7) If applicable, in the “Quantity Based Price Tiers” section quote line item prices based on volume.

**Note:** As needed, click on the “Save Draft” button to save a current copy of what you have entered so far.

- (8) Click on the “Apply” button, then the “Create Quote” screen will appear with the fields in the lines populated with the information that you provided.

## 7. VALIDATE AND SUBMIT THE RFQ

After completing all of the RFQ sections, proceed to submit your quotation.



Create Quote: 440583 (RFQ 474193)

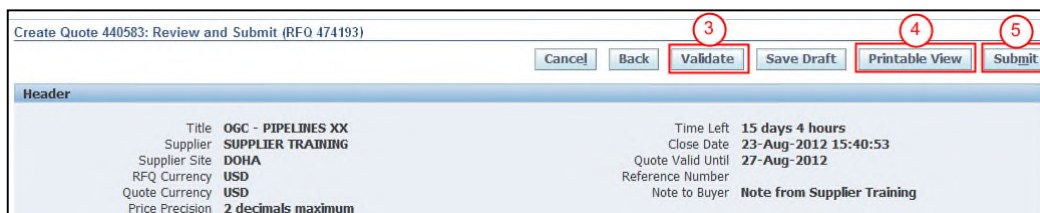
Buttons: Cancel, **1 View RFQ**, Quote By Spreadsheet, Save Draft, **2 Continue**

Title: OGC - PIPELINES XX  
 Time Left: 15 days 4 hours  
 Close Date: 23-Aug-2012 15:40:53  
 Two-Stage RFQ

Supplier: SUPPLIER TRAINING  
 Supplier Site: DOHA - 101 MAIN ST, DOHA, QATAR QA  
 RFQ Currency: USD  
 Quote Currency: USD  
 Price Precision: 2 decimals maximum

Quote Valid Until: 27-Aug-2012  
 Reference Number: (example: 24-Jul-2012)  
 Note to Buyer: Note from Supplier Training

- (1) Review the RFQ before submitting it by clicking on the “View RFQ” button.
- (2) Click on the “Continue” button.



Create Quote 440583: Review and Submit (RFQ 474193)

Buttons: Cancel, Back, **3 Validate**, Save Draft, **4 Printable View**, **5 Submit**

Title: OGC - PIPELINES XX  
 Time Left: 15 days 4 hours  
 Close Date: 23-Aug-2012 15:40:53  
 Supplier: SUPPLIER TRAINING  
 Supplier Site: DOHA  
 RFQ Currency: USD  
 Quote Currency: USD  
 Price Precision: 2 decimals maximum

Quote Valid Until: 27-Aug-2012  
 Reference Number:  
 Note to Buyer: Note from Supplier Training

- (3) Click on the “Validate” button to verify the quotation before submitting it.

**IMPORTANT:** A confirmation message will appear notifying you that the quotation for the RFQ has been validated without any errors. If any errors were present, the errors will be shown above the header section. Errors are usually related to missing information in the header and/or requirements section so this should be reviewed to confirm that it is complete. This confirmation message only validates that all required fields have been populated. This validation does not mean that the quote is approved by CRC.

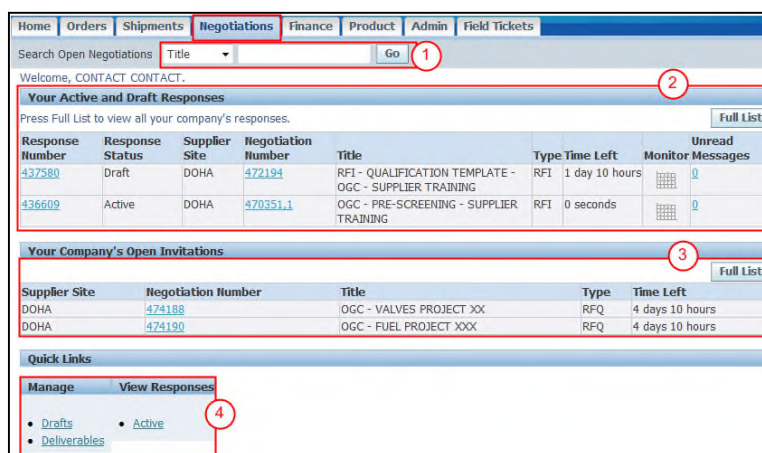
- (4) A draft copy of the RFQ quote can be printed by clicking on the “Printable View” button.  
**Note:** A “Pop-Up” screen will be displayed. Either click on the “Open” button to view the PDF file and print it using the Acrobat Reader or click on the “Save” button to save the PDF file in the computer.
- (5) Click on the “Submit” button. A confirmation message as shown below will appear on the screen to indicate that the RFQ has been submitted.

 **Confirmation**  
 Quote 440583 for RFQ 474193 (OGC - PIPELINES XX) has been submitted.

## 8. ADMINISTRATE THE RFQ AND QUOTES

### 8.1. NAVIGATE THROUGH THE NEGOTIATIONS TAB

Click on the **“Negotiations”** tab to view, acknowledge and respond to the RFQ invitation. This tab displays the following sections.




- (1) The **“Search Open Negotiations”** section allows searching you to search documents in the portal
- Select one of the following search criteria in the dropdown menu:

Criteria	Description
Title	RFQ Title
Number	RFQ number
Contact	CRC’s contact (usually CRC Buyer)
Line	Documents CRC’s material/service item number
Category	Documents that include a particular category
Event	Documents associated with a particular event

- Enter the applicable value (RFQ number, Contact name, etc.)
  - Click on the **“Go”** button.
- (2) The **“Your Active and Draft Responses”** section shows only the events in which the current user is participating in and has already created a draft or submitted a quote for.
- Note:** To view all active and draft quotes that your company is participating, including the events responded by other users, click on the **“Full List”** button.

Column	Description
Response Number	Your company’s response number associated with a Negotiation Number (CRC’s document). To view the response, click on the <b>“Response Number”</b> hyperlink. The negotiation summary screen will be shown.
Response Status	RFQ response statuses. <ul style="list-style-type: none"> <li>Active: Response successfully submitted by Supplier</li> <li>Draft: Response not submitted, it is under Supplier review.</li> </ul>

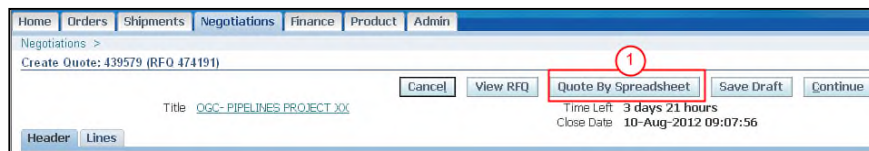
	CALIFORNIA RESOURCES CORPORATION AND ITS AFFILIATES (COLLECTIVELY, CRC)	
	User Guide – Quote Request for Quotation (RFQ)	Version 1.0 December 1, 2014

Column	Description
Supplier Site	CRC's Internal identification of a Supplier's office.
Negotiation Number	RFQ number associated with your company's quote number. To view the CRC document, click on the " <b>Negotiation Number</b> " hyperlink. The " <b>Document Summary</b> " screen will be shown.
Title	RFQ Title.
Type	The type of document such as Request for Information (RFI) or Request for Quotation (RFQ)
Time Left	The remaining time available before the document will be closed. Supplier can submit a quote until CRC document is closed.
Unread Messages	The number of unread messages that were sent through the Online Discussion functionality. To view the message, click on the " <b>Number</b> " hyperlink. For further information, see section <a href="#">8.4. - Online Discussions (Inquires, Clarifications, etc.)</a>

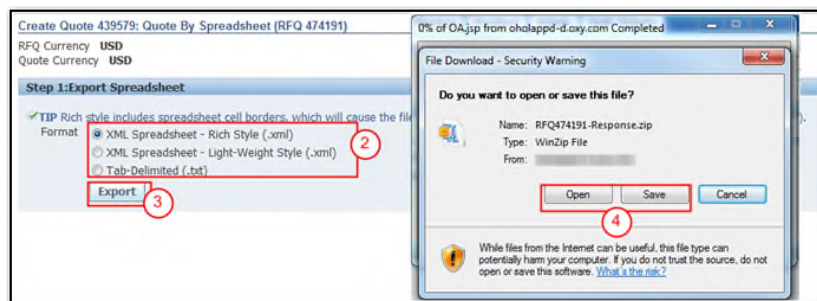
- ( 3 ) The "**Your Company's Open Invitations**" section shows the negotiations that your company has been invited to participate in but has not yet submitted or created a draft quotation for.  
**Note:** To view all open invitation click on the "**Full List**" button.
- ( 4 ) The "**Quick Links**" panel provides quick access to drafts, deliverables and active quotes.

## 8.2. QUOTE BY SPREADSHEET

The functionality **“Quote by Spreadsheet”** allows you to quickly populate the quotation in an Excel spreadsheet. This method is helpful if there are a large number of lines items that are being quoted in the RFQ.

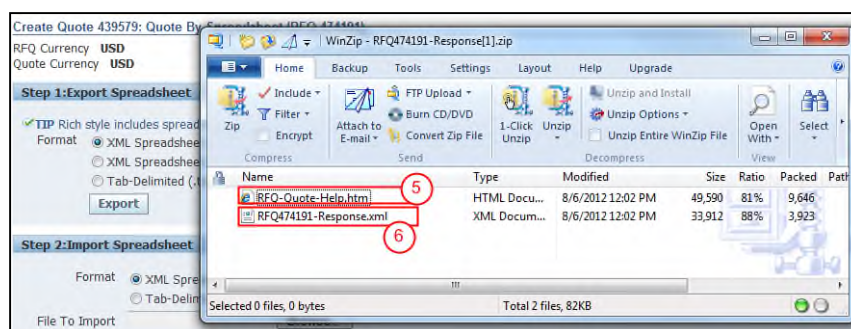


- (1) After executing the **“Create Quote”** action, the screen above is displayed, click on the **“Quote by Spreadsheet”** button.



- (2) In the **“Export Spreadsheet”** section, select a **“Format”** radio button (i.e.: XML spreadsheet- rich style, XML spreadsheet – light weight style, Tab- delimited).
  - (3) Click on the **“Export”** button. A pop-up screen will appear.
  - (4) Click on the **“Save”** button, and save the file on the desired location in your computer.
- Note:** The file is saved in your computer as a zip file.

- Open the downloaded zip file, this file contain the spreadsheet and the instructions for completing the information.



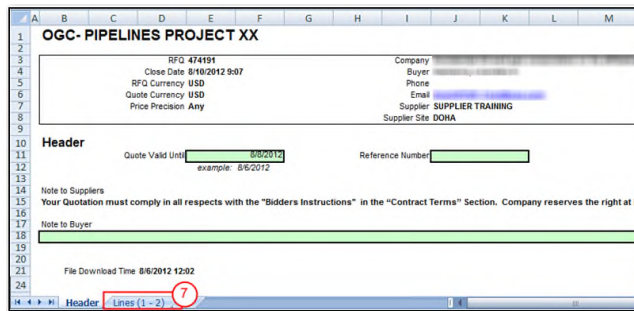
- (5) The **“RFQ – Quote – Help.htm”** file describes the information contained in the spreadsheet and provides the instructions for creating quotes and importing them to RFQs using the spreadsheet.
- (6) The **“RFQXXX-Response.xml”** file is the Excel spreadsheet. Extract the file to your computer or double click the **“File”** icon to open it. Save this file to your computer for future access.



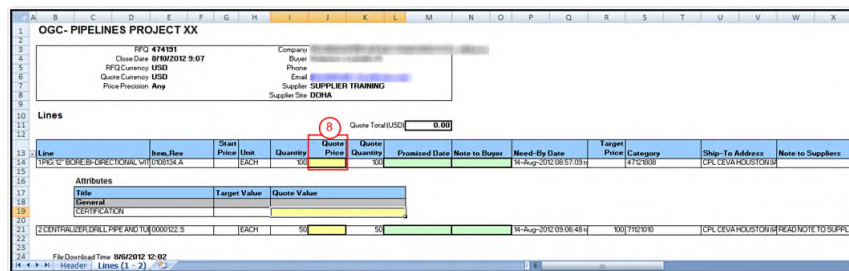
**Note:** This file will contain any quote that was previously saved in the “Quote” screen. These fields can be updates, as needed.

**Note:** The screenshot above is for illustration purposes only, in this example the spreadsheet is in XML Spreadsheet – Rich Style (.xml) format. However, you can choose a different format when creating the document as seen in Step 2 above.

- Follow the instructions to populate the fields and make sure to respond all the required fields among the “RFQ Header” and the “RFQ Lines” tab.



( 7 ) Click on the “Lines (1- X)” tab to enter the quote per line.



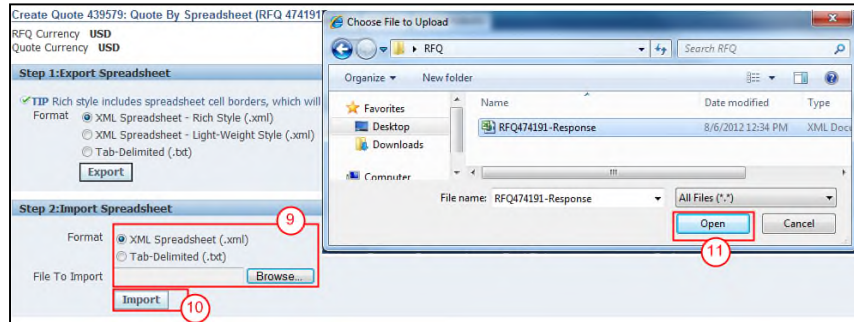
( 8 ) In the “Quote” column (column J), enter the quote price. **In general, the Excel spreadsheet will not have all the response values required.** Therefore, check the RFQ for the available response values for each requirement.

**Note:** Save the file in your desktop,

**IMPORTANT:** Do not modify the remaining columns.



- After you have entered your quotes, save the spreadsheet, log in to the portal and open the response associated with the spreadsheet. And then, open the **“Create Quote”** screen by clicking on the **“Quote by Spreadsheet”** button.



- ( 9 ) In the **“Import Spreadsheet”** section, select the appropriate **“Format”** radio button and click on the **“Browse”** button. A pop-up screen will appear.
- ( 10 ) Search for the completed spreadsheet, and then click on the **“Open”** button.
- ( 11 ) Click on the **“Import”** button to upload the spreadsheet. The **“Quote”** screen will appear with the uploaded quotation.

**Note:** If errors are detected during the import process a message will be displayed and the file will not be uploaded. See screenshot below.

Import Errors					
Worksheet Name	Spreadsheet Row Number	Table	Column Title	Error Value	Error
Header	11		Quote Valid Until	08-Aug-2012	Quote expiration date must be later than close date
Lines (1 - 2)	19	Attributes	Quote Value		A quote value is required for line 1: attribute CERTIFICATION.




8.3. RECEIVE AND ADDRESS RFQ ADDITIONAL EVENT NOTIFICATIONS

During the negotiation process, Suppliers can receive email notifications for the following events.

Event Notification	Description	Supplier Action	Notification Subject
Extended RFQ	CRC has extended the event's close date.	Verify that response to the Request for Quote (RFQ) has been submitted.	<p>From: CRC - Notification - Staging [mailto:notification@crc.com]</p> <p>To: CONTACT CONTACT</p> <p>Cc:</p> <p>Subject: <b>FYI: Extended: RFQ 474191 (OGC- PIPELINES PROJECT XX)</b></p>
Paused RFQ	CRC has paused an event.	Optionally, create a draft quote but it cannot be submitted.	<p>From: CRC - Notification - Staging [mailto:notification@crc.com] Sent: Wed 8/8/2012 3:52 PM</p> <p>To: CONTACT CONTACT</p> <p>Cc:</p> <p>Subject: <b>FYI: Sent: Online Discussion Message for RFQ 474191 (OGC- PIPELINES PROJECT XX)</b></p>
Early Close	CRC has closed the event to receive quotes.	No additional action is required.	<p>From: CRC - Notification - Staging [mailto:notification@crc.com]</p> <p>To: CONTACT CONTACT</p> <p>Cc:</p> <p>Subject: <b>FYI: Closed Early: RFQ 474192,1 (OGC - PIPELINES XX)</b></p>
Amend Negotiation	CRC has amended the RFQ document.	View, Re-acknowledge the document and re-submit a quote.	<p>From: CRC - Notification - Staging [mailto:notification@crc.com] Sent:</p> <p>To: CONTACT CONTACT</p> <p>Cc:</p> <p>Subject: <b>FYI: Acknowledgement Required: Amendment 1 to RFQ 474192 (OGC - PIPELINES XX)</b></p>
Canceled Negotiation	CRC has cancelled an event.	No additional action is required.	CRC Buyer will notify the Supplier.
New Round	CRC has reviewed the Supplier's quotes and has decided to conduct a new round to get new quotes.	Acknowledge the new round and document and submit a new quote.	<p>From: CRC - Notification - Staging [mailto:notification@crc.com] Sent: Wed 8/8/2012</p> <p>To: CONTACT CONTACT</p> <p>Cc:</p> <p>Subject: <b>Action Required: You are invited: Additional round of RFQ 474192-2 (OGC - PIPELINES PROJECT XX)</b></p>

**IMPORTANT:** Even though notifications provide basic deliverable status information, it is necessary to access the specific deliverable within the iSupplier Portal to view and open for additional information.

**IMPORTANT:** For automatic notifications the email sender will be "CRC – Notification" not a specific CRC Buyer. If you do not receive a notification in your mailbox, please check your mailbox spam, trash or delete folders, or see if it might have been filtered by your company spam filtering services. Make sure to set "CRC – Notification" as a valid email sender to avoid any issue for subsequent notifications. Yahoo and Hotmail email account users might NOT receive some notifications correctly. If an email notification contains an error message, contact the CRC Buyer.

	CALIFORNIA RESOURCES CORPORATION AND ITS AFFILIATES (COLLECTIVELY, CRC)	
	<b>User Guide – Quote Request for Quotation (RFQ)</b>	Version 1.0 December 1, 2014

**Note:** For more information about Notifications, view the [User Guide – Overview Access and Passwords, Navigations and Notifications](#)

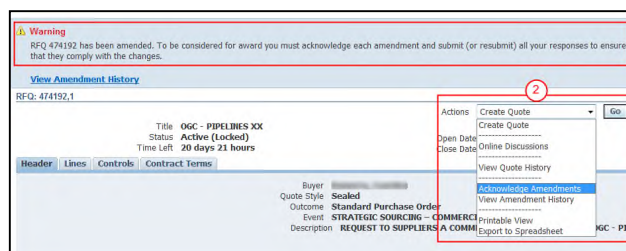
### 8.3.1. MANAGE AMENDED RFQ

CRC can amend a RFQ document and request re-acknowledge and re-submitting a quote. The amended RFQ will be shown in the **“Your Company’s Open Invitation”** section. Access the portal to review and acknowledge the amended RFQ to be considered for the negotiation.

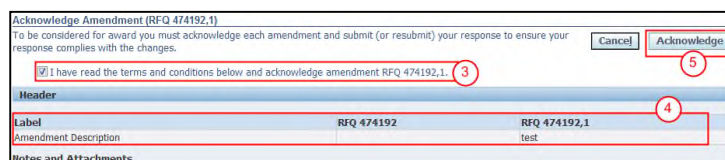
Your Company's Open Invitations				
Supplier Site	Negotiation Number	Title	Type	Time Left
DOHA	<a href="#">474188</a>	OGC - VALVES PROJECT XX	RFQ	3 days 1 hour
DOHA	<a href="#">474192.1</a>	OGC - PIPELINES XX	RFQ	20 days 22 hours

- Identify the document’s negotiation number and click on the **“Negotiation Number”** hyperlink to re-acknowledge the amended RFQ.

**Note:** The negotiation number of amended RFQs is composed of its legacy negotiation number and the amendment number. i.e.: XXXXXX, 1; XXXXXX, 2; etc..



- Select the **“Acknowledge Amendments”** option from the **“Action”** dropdown menu and then click on the **“Go”** button.



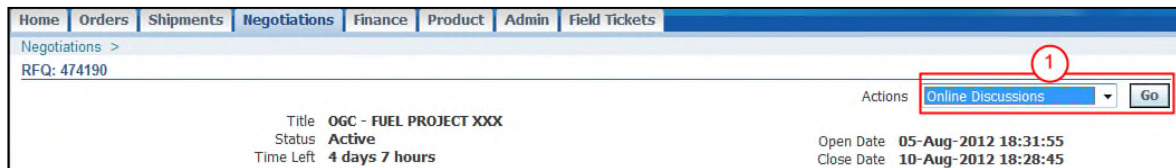
- Check on the **“I have read the terms and conditions below and acknowledge amendment RFQ XXXXXX, X”** checkbox to confirm acknowledgement.
- Read the description of the amendment to see what action is required. Click on the **“Acknowledge”** button. A confirmation message will appear.



- Click on the **“Yes”** button to respond the amended negotiation. Then, the **“Quote”** screen will appear. For further instructions on how to quote a RFQ, see section [6. - Create a Quote](#).

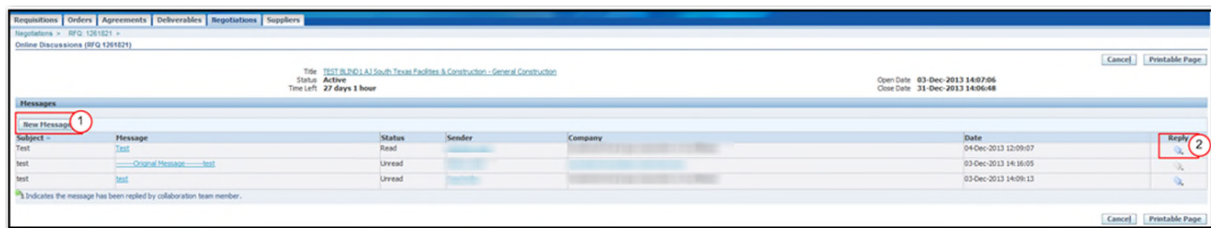
#### 8.4. ONLINE DISCUSSIONS (INQUIRES, CLARIFICATIONS, ETC)

After reviewing the RFQ, you can use the Online Discussion functionality to communicate with the Buyer for any further clarification or to provide additional information to CRC regarding the RFQ. This functionality replaces any email communication. To create or access Online Discussions, find the RFQ document as described in section [3. - Search for the RFQ.](#)



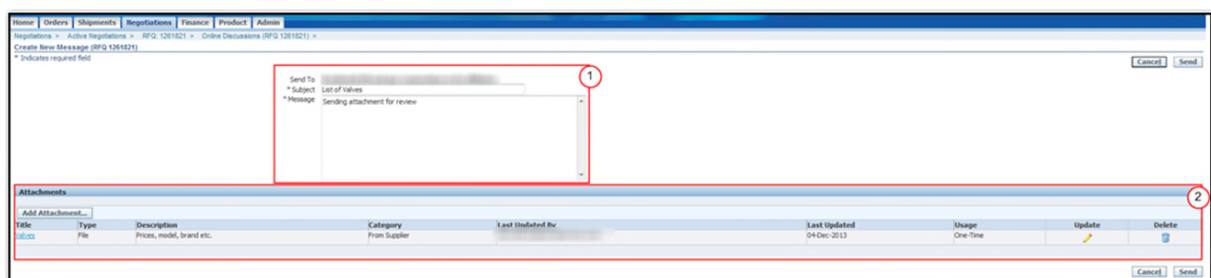
- (1) Select the option “**Online Discussion**” from the “**Actions**” dropdown menu, and click on the “**Go**” button.

The online discussion screen will be displayed.



- (1) Click on the “**New Message**” button to create a new message.
- (2) Click on the “**Reply**” icon to reply to a message.  
**Note:** Click on the “**Printable Page**” button to print all messages or click on the “**Cancel**” button to return to the “**Negotiations**” screen.

In the specific online discussion screen, complete the message and as needed, add attachments.



- (1) Under the Online Discussion header section, the “**Send To**” field displays CALIFORNIA RESOURCES corporation or its affiliates:
  - Enter the subject line in the “**Subject**” field.
  - Enter a brief message to send out to the receiver in the “**Message**” field.

**IMPORTANT:** When replying to a message the subject of the message will be pre-populated, you can change the subject by typing over the pre-populated information.

(2) As needed, under the “Attachments” section, add, remove or update attachments.

- Click on the “Delete” Trash Can icon to remove an attachment
- Click on the “Update” Pencil icon to change the attachment
- Click on the “Add Attachment” button to add a new attachment.

(1) From the “Add” dropdown menu, select the **Desktop File/Text/URL** option.

(2) Under the “Attachments Summary Information” section, complete the following:

- In the “Title” field, enter the name of the attachment.
- In the “Description” field, enter the description of the attachment.

(3) The “Category” field displays **From Supplier**. Under the “Define Attachment” section, select the applicable “Type”.

- If “Type” is **File**, click on the **Browse** button to attach the document.
- If “Type” is **URL**, enter the URL in the URL field.
- If “Type” is **Text**, type the message in the text box.

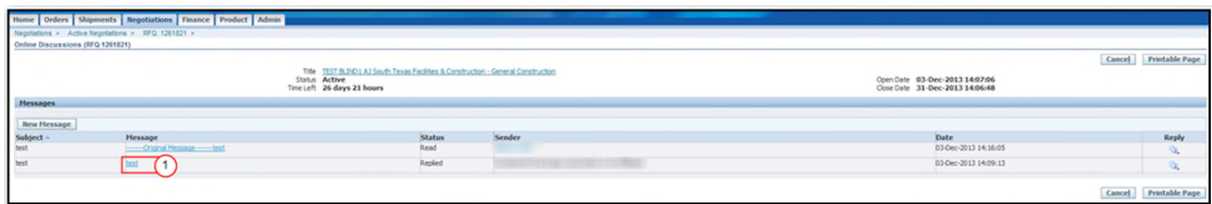
(4) Click on the “Apply” button to return to the message or to add additional attachments, click on the “Add Another” button.

(1) Click on the “Send” button to send the message. System will return to the Online Discussions screen, displaying the sent message under the “Messages” section.

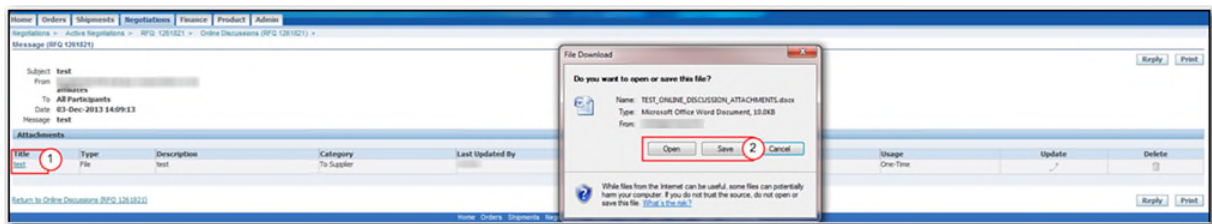
(1) Click on the “Cancel” button to return to the “Negotiations” screen.

#### 8.4.1. View Sent Online Discussion Attachments

When attachments are included with the online discussion message, the attachments are displayed under the body of the specific online discussion message. Open the online discussion message to access the specific attachments.



(1) Locate and click on the title of the online discussion message hyperlink to view the message and attachment.



- (1) If attachments have been included in the online discussion it will be displayed under the “Attachments” section as a hyperlink. Click on the title hyperlink.
- (2) The system will display the “File Download” window, click on the “Open” button to view the attachment. Or click on the “Save” button to save the attachment.



### 8.5. MANAGE DRAFTS RESPONSES

If a draft copy of the RFQ quote was created, you can open the draft and resume completing the quotation by clicking on the **“Drafts”** hyperlink in the **“Quick Links”** panel at the bottom of the **“Negotiations”** tab, as shown in section [8.1. - Navigate through the Negotiations Tab](#).

- (1) In the **“Search”** section, populate the search criteria and click on the **“Go”** button. The **“Draft Response”** table will be displayed.
- (2) In the **“Draft Response”** table select the applicable draft quotation by checking the radio button next to the Response Number. This table shows the following key columns.

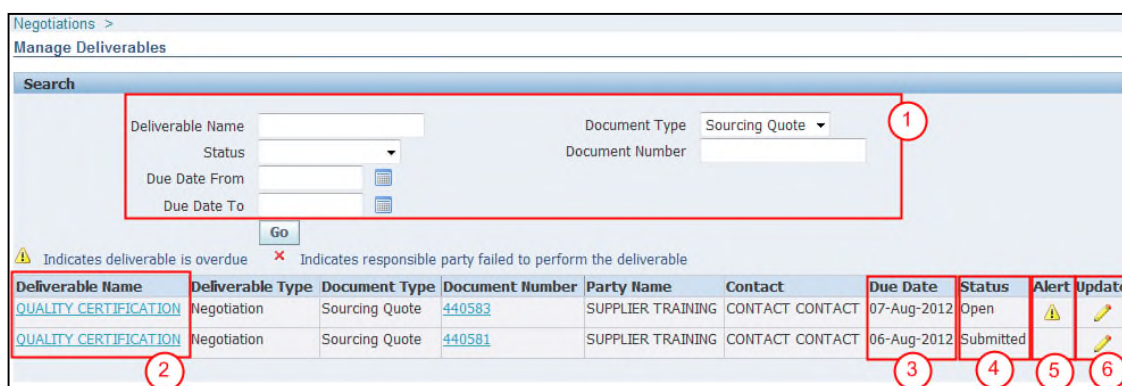
Key Column	Description
Locked by	Name of user working on the draft quote
Locked date	Date when the user created the quote
Response Created by	Name of user who created the draft quote

- (3) Click on one of the following action buttons.

Action Button	Functionality
Respond by Spreadsheet	To respond the RFQ by importing an excel spreadsheet. For further information see section <a href="#">8.2. - Quote by Spreadsheet</a>
Delete	To delete a draft quote
Unlock	To allow another Supplier user to complete and submit the quote
Review and submit	To review and submit the draft quote
Update	To add additional information to a draft quote

## 8.6. MANAGE DELIVERABLES

View and manage deliverables related to RFQ documents by clicking on the **“Deliverables”** hyperlink in the **“Quick Links”** section on the **“Negotiations”** tab, as shown in section [8.1 – Navigate through the Negotiations Tab](#).



Search

Deliverable Name:  Document Type: Sourcing Quote

Status:  Document Number:

Due Date From:  Due Date To:

Go

Indicates deliverable is overdue (Warning icon) Indicates responsible party failed to perform the deliverable (Error icon)

Deliverable Name	Deliverable Type	Document Type	Document Number	Party Name	Contact	Due Date	Status	Alert	Update
<a href="#">QUALITY CERTIFICATION</a>	Negotiation	Sourcing Quote	440583	SUPPLIER TRAINING	CONTACT CONTACT	07-Aug-2012	Open		
<a href="#">QUALITY CERTIFICATION</a>	Negotiation	Sourcing Quote	440581	SUPPLIER TRAINING	CONTACT CONTACT	06-Aug-2012	Submitted		

- (1) In the **“Search”** section, populate the applicable criterion (i.e.: Deliverable Name, Status, Due Date From, etc) or leave it blank, and then click on the **“Go”** button. The **“Deliverables”** table will be displayed.
- (2) View the deliverable details by clicking on the appropriate title hyperlink in the **“Deliverable Name”** column.
- (3) The **“Due Date”** column shows the date that the action needs to be completed by.  
**Note:** **“Prior to”** and **“Overdue”** automatic notifications are based on this date.
- (4) The **“Status”** column can show the following deliverable statuses.

Status	Description
<b>Open</b>	Deliverable has not been submitted. It is expected that the Responsible Party takes actions before the due date.
<b>Submitted</b>	Deliverable related documentation/information has been submitted/updated by the Responsible Party. It is possible for CRC submit a deliverable on behalf of the Supplier if the Supplier submitted the documentation to CRC. However, it is preferable that the Supplier will submit their assigned deliverables themselves.
<b>Rejected</b>	Deliverable related documentation/information was reviewed by CRC and it was found to be inaccurate, incomplete or not satisfactory. It is expected that Supplier will re-submit the documentation addressing CRC’s comments and requirements.
<b>Completed</b>	Final Status - Deliverable related documentation/information was reviewed by CRC and it is satisfactory. No additional action is required from the Responsible Party.
<b>Cancelled</b>	Final Status - Deliverable no longer needed. No additional action is required from the Responsible Party.
<b>Failed to Perform</b>	Final Status - Deliverable related documentation/information was reviewed by CRC and it is NOT satisfactory. It is NOT expected that the Responsible Party will take any additional action.

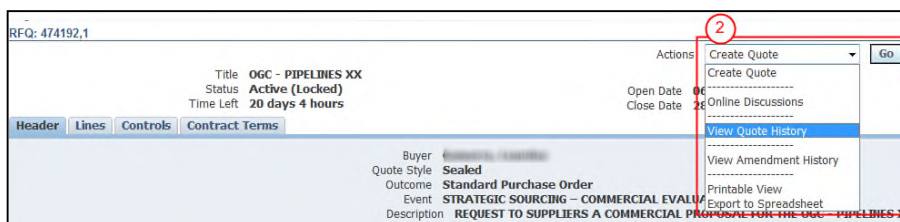
- (5) The **“Alert”** icon is displayed if the deliverable is overdue.
- (6) Click on the **“Pencil”** icon on the **“Update”** column to upload deliverables documentation.

## 8.7. VIEW QUOTE HISTORY

If multiple quotes have been submitted in response to an RFQ, access and view them using the “**View Quote History**” functionality.

Your Active and Draft Responses							
Press Full List to view all your company's responses. <span style="float: right;">Full List</span>							
Response Number	Response Status	Supplier Site	Negotiation Number	Title	Type	Time Left	Unread Monitor Messages
<a href="#">439579</a>	Draft	DOHA	<a href="#">474191</a>	OGC- PIPELINES PROJECT XX	RFQ	1 day 21 hours	0
<a href="#">440583</a>	Active	DOHA	<a href="#">474193.1</a>	OGC - PIPELINES XX	RFQ	15 days 3 hours	0
<a href="#">440585</a>	Active	DOHA	<a href="#">474192.1</a>	OGC - PIPELINES XX	RFQ	20 days 4 hours	0

- (1) Click on the “**Negotiation Number**” hyperlink to access to the all activity related to the quote.



- (2) In the “**Action**” dropdown menu, select the “**View Quote History**” option, and then click on the “**Go**” button. The “**Quote History**” screen will appear.

Quote History (RFQ 474192,1)							
<div style="text-align: right;"> <span>Online Discussions</span> <span>Create Quote</span> </div>							
Title <a href="#">OGC - PIPELINES XX</a> Status <b>Active (Locked)</b> Time Left <b>20 days 3 hours</b>				Status <b>Active (Locked)</b> Close Date <b>28-Aug-2012 15:44:11</b>			
Supplier	Supplier Site	Contact	Quote	Status	Quote Total (USD)	Time of Quote	Quote Valid Until
SUPPLIER TRAINING	DOHA	<a href="#">CONTACT, CONTACT</a>	<a href="#">440585</a>	Active	19,100.00	08-Aug-2012 11:38:14	29-AUG-2012
SUPPLIER TRAINING	DOHA	<a href="#">CONTACT, CONTACT</a>	<a href="#">440581</a>	Archived	19,150.00	07-Aug-2012 18:51:34	29-AUG-2012

- (3) The “**Quote**” column allows access to the quote by clicking on the respective “**Quote Number**” hyperlink.  
 (4) The “**Status**” column can show the following statuses.

Status	Description
Active	Current quote sent to CRC
Archived	Past quote sent to CRC. Archived quotes are not considered for the negotiation

- (5) From the “**Quote History**” screen you can create another quote by clicking on the “**Create Quote**” button if necessary.