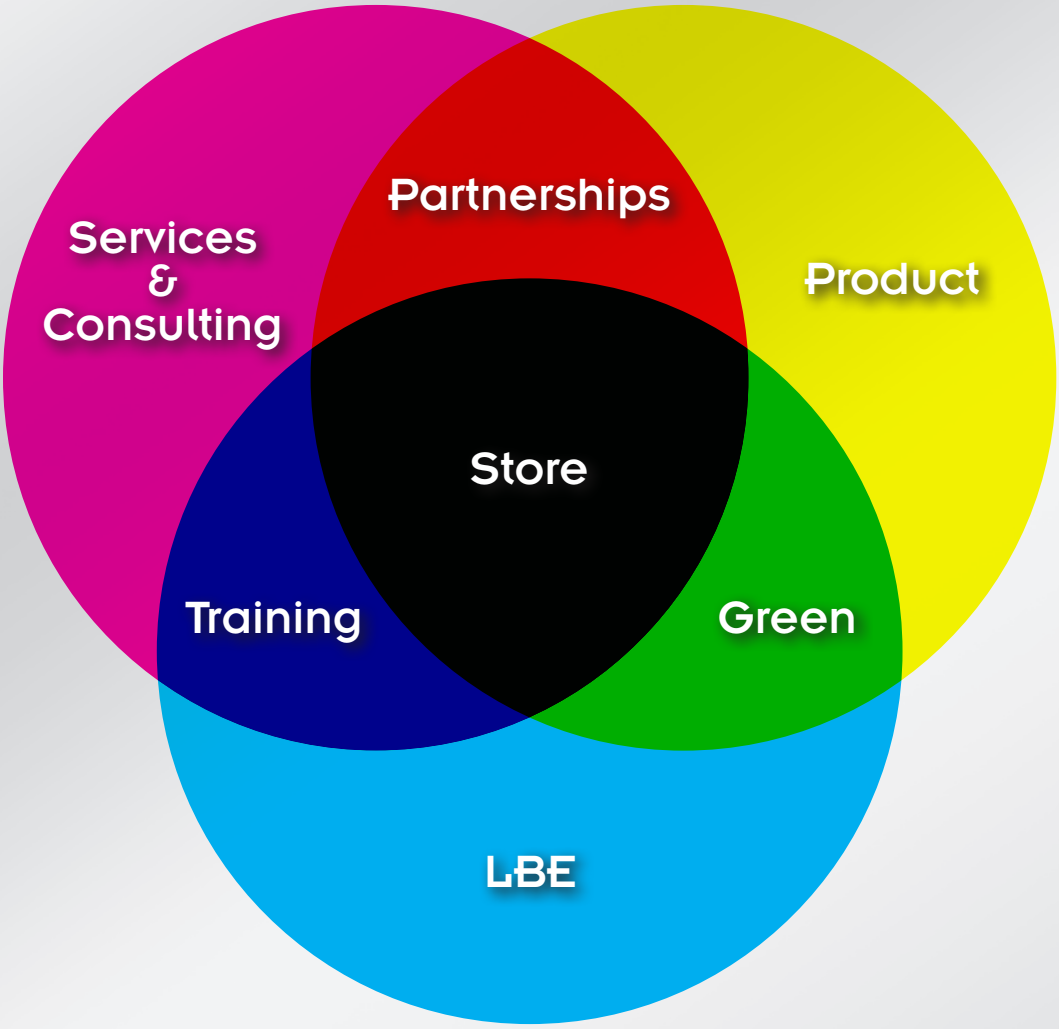
San Francisco Technology Store



User Guide

TABLE OF CONTENTS

SECTION 1 – WELCOME TO THE TECHNOLOGY STORE PAGE

Introduction 2
What is the Technology Store 3
When You Should Use The Technology Store 4

SECTION 2 – ORDERING HARDWARE AND SOFTWARE

General Information 5
Important Things to Know 5

SECTION 3 – ORDERING MAINTENANCE SERVICES

General Information 8
Important Things to Know 9

SECTION 4 – PROFESSIONAL SERVICES

General Information 10
Important Things to Know 11
Project Checklist....15

SECTION 5 – UTILIZING CATEGORY 3 CONTRACTS

General Information 16
Important Things to Know 16

SECTION 6 – LEASING

General Information 18

SECTION 7 – APPENDICES

Appendix A **Category 1 – Products and Services**
Vendor Contact Information 19
Pricing Information 22

Appendix B **Category 2 – Products**
Vendor Contact Information 29
Pricing Information 31

Appendix C **Category 3 – Micro-LBE Set-aside Contracts**
Vendor Contact Information – Products EQ108 36
Vendor Contact Information – Maintenance Services GS093 38
Pricing Information 39

Appendix D OCA/Purchasing (OCA) Contact Information....40

Appendix E Forms and User Guides....41

Appendix F Sample Master Store Contract Category 1....48

SECTION 1

INTRODUCTION

Welcome to the Technology Store. Formerly known as the Computer Store, the first store was established in 1998 to provide a new, more effective process for purchasing technology-related goods and services within the City and County of San Francisco while still remaining compliant with City rules and regulations. The name change reflects the need to facilitate a wider array of technologies and expertise for the City. We hope that you will find the Store a useful tool in maximizing your work efforts.

In this guide, we provide a general overview of what you will need to conduct business with the Store. Every technology need is unique and not all the solutions you are looking for can be found here, so please call the Office of Contract Administration staff for contracting assistance with any question or problem you may have related to the Store. For technical assistance, please contact the Department of Technology.

WHAT IS THE TECHNOLOGY STORE?

The Technology Store is one way for City employees to acquire technology-related goods and services from pre-qualified vendors. Through an RFP process the City has selected and contracted with a number of technology resellers that provide IT goods and services. All the selected vendors are fully compliant with City regulations and requirements. You may do business with any vendor in the Store. We suggest that you contact several of the vendors every time you request a quote. Requesting several quotes encourages the vendors to compete among themselves for your business and saves the City money.

Depending upon your knowledge and skill, purchasing technology for your department can be a difficult and complex process. Using the Store can make this process easier. The Store Staff and vendor representatives are available to assist you through this process and help you get the best possible result for your project.

Although the Technology Store functions largely like the Computer Store of the past, the Technology Store establishes three categories of vendors from the outset.

- **Category 1 Services and Products.** These vendors may provide products, but the major focus of their participation in the Technology Store will be professional and project-related services.

- **Category 2 Products Only.** Theses vendors may provide products only.

- **Category 3 Micro-LBE Set Aside Program.** This is a pilot program in which local small businesses were awarded $100,000 as-needed contracts to provide specific products and maintenance services.

Of course, there are procedures for using the Store and you are expected to comply with these. We recognize that there will always be exceptions to these procedures and we will do our best to assist you in solving your IT-related problems.

The Store exists for your convenience, so please take advantage of it for your technology needs.

WHEN SHOULD YOU USE THE STORE

You can use the Store for most technology purchases/services you make for your department. All departments should use the Store for acquiring computer and IT-related goods. If a Store vendor cannot supply the product you seek, then you may use traditional purchasing methods. If you have any questions, please contact OCA Staff.

Goods: The Store vendors are required to make available to you just about any technology-related hardware or software product that you need.

Professional Services: When planning for a project that will require temporary assistance from specialists in a particular area of technology you should exhaust every effort to obtain these services using CCSF staff first, either with your internal staff or through work ordering staff from another CCSF department.

If City staff are not available to work on your project, the Store vendors have staff or subcontracting relationships with other technology companies to provide the required services. Some vendors have core competencies in specific areas and may be better suited to fulfill your requirements. Please note that departments are not allowed to "marry" subcontractors with any of the Store vendors. In other words, you cannot pre-select a subcontractor for a particular project and insist that one of the Store vendors use that subcontractor. It is the Store vendors' responsibility to quote the best possible solution (including a subcontractor) for your requirements. If you are not sure whether or not a project is right for the Store, please consult with the OCA Staff.

Please note that IFPTE Local 21 will review all professional services requests. Section 4 explains the process in detail.

SECTION 2

HARDWARE AND SOFTWARE ORDERING

GENERAL INFORMATION

The process of ordering hardware through the Technology Store is straightforward. There are, of course, guidelines and restrictions about which you should be aware. The purpose of this section is to provide you with information that pertains to most hardware purchases.

Generally speaking, the process flow for ordering hardware through the Store is:

- Determine your requirements.
- Contact the Store vendor(s) of your choice for a quote(s). It is highly recommended that you contact all Category 2 vendors and Category 3 Micro-LBE vendors in group EQ108. (Note: When requesting a quote you may put a time limitation for return of the quote to you from the vendor. Generally, for products only, Store vendors are required to respond within 48 hours excluding weekends. For purchases that are expected to exceed $100,000, 3 quotes are required and you may want to allow the vendors more time to respond.)
- Review the final quote form (Form 1).
- Have the appropriate department representative sign and date the form.
- As of August 15, 2009, enter your requisition into NFAMIS. For technology purchases only the new document type is "RT". Submit the form along with a screen print of the NFAMIS-Purchasing requisition to the CIO for review and approval by fax at (415) 581-3908 or by email to cio.review@sfgov.org. Urgent requests or appeals should be emailed to cio.appeal@sfgov.org. If you have questions regarding the CIO approval, please contact Christine Martin, DT Chief of Staff, at (415) 581-4097.
- Once approved, the CIO will forward all supporting documentation to OCA for review, approval and processing.
- OCA may require additional documentation for review and approval purposes.

There will always be situations that will require individual consideration. If you have a requirement that does not seem to fit into the regulations and guidelines discussed in this manual, please call OCA Staff for advice and guidance.

IMPORTANT THINGS TO KNOW

1. Forms: When requesting hardware or software through the Technology Store, you must provide a valid quote from a Technology Store vendor using Form 1. (See Appendix E for a hardcopy of the form as well as a sample and user guide for completing it. The sample and user guide will assist you in filling out the form and it tells you which party is responsible for completing each field.) The form may be downloaded from the OCA website or the Document Library on the CCSF Intranet. Vendors also have copies of all forms. The vendor will prepare your quote on the form and submit it to you for review

and acceptance. You are responsible for ensuring that the correct form is being used as well as ensuring that all required fields are filled-in completely.

Incomplete forms will be returned to the Department for completion and will not be approved by OCA Staff.

2. Delivery/Invoicing/Payment Address: When completing the Quote Approval form please be sure to fill in all fields for delivery, invoice and payment address information. Even if they are all the same it is important to have the correct information on the form. If the addresses are different it is important that this information be entered correctly into NFAMIS-Purchasing.

3. Competitive bidding: If you are ordering products only, you may call any Category 2 vendor (see Appendix B) that provided pricing during the RFP process for that category of products. Although the Technology Store contract is competitively bid with aggressive price caps identified, we strongly suggest that you contact at least two Category 2 store vendors to receive quotes for your purchase to encourage stronger competition. Departments are required to request 3 quotes for hardware and software purchases exceeding $100,000. A detailed justification is required to reject a low quote.

4. Pricing: See Appendix B.

5. New/Used Products: Generally, vendors are allowed to sell only new products to the City. In extremely rare instances only used or reconditioned products are available. Departments are not allowed to order used products through the Technology Store.

6. Order Cancellations: At any time prior to delivery, your department may cancel orders other than special orders of non-standard items. Cancellations must be requested through OCA.

7. Deliveries:
   a. All orders must be delivered within ten City business days after the vendor receives the purchase order, unless the product is not available from the manufacturer/distributor.
   b. Vendors are required to notify you within 72 hours if there will be a delay in the delivery of your order.
   c. All products purchased through the Technology Store will be delivered free of charge and designated “FOB Destination”.
   d. All deliveries shall be delivered inside the building.

8. Returns:
   a. All unopened products from Cisco, Dell, HP and IBM may be returned within 30 days of delivery and your Department will be credited in full. Your Department will not be responsible for paying any restocking fees.

b. For all other products, vendors may pass through actual restocking fees incurred from a third party supplier. Administrative costs and handling fees are not allowed.

9. Warranties:
   a. As applicable, vendors must be authorized by the manufacturer to sell and provide service on their products, except where the manufacturer retains exclusive service rights to the equipment.
   b. If certified to do so, Vendors must offer to Technology Store customers warranty services for any product they sell through the Store. If Vendors are not certified to provide warranty services; they may be asked to facilitate services for products they have sold through the Technology Store.
   c. Vendors must pass title of product purchased to the City within 48 hours (excluding weekends) of delivery of product in order for the City to receive warranty services (generally this issue relates to the purchase of Dell products).

10. Maintenance: If maintenance is included with your purchase please clearly note the terms of the maintenance on the quote form and in the NFAMIS-Purchasing requisition.

11. Prepayments: Under no circumstances can a Department authorize payment in advance of delivery of goods for orders not delivered in full. No prepayments are allowed.

12. Packing Slips: All deliveries should be accompanied by a packing slip that shows the Purchase Order number, a complete list of items delivered, your department name and a contact person. Please keep all packing slips for your files and provide a copy with the invoice for this order when submitting the invoice for payment following your department procedures. Some departments must also complete a Materials Received Report ("MRR") for each order received.

13. Substitutions: Vendors are not allowed to substitute products without prior approval from the ordering department.

SECTION 3

MAINTENANCE ORDERING

GENERAL INFORMATION

Maintenance for hardware and software can be ordered through the Technology Store. Maintenance of any kind must be ordered separately from a hardware/software order unless it is included with the original purchase. When ordering maintenance services through the Store, use Form 2, which can be found in Appendix E of this manual as well as the OCA website or the Document Library on the Intranet. Vendors also have a copy of the forms for the purpose of preparing quotes.

While most maintenance service requirements are routine in nature, there are always exceptions. If you are not sure about how to order maintenance or have an unusual circumstance, please contact OCA Staff for assistance.

Departments utilizing the Technology Store to contract for maintenance services will provide the vendor(s) with all requirements necessary for the service. The Store vendor will then come back to the Department with a quote and a plan for how the services will be provided under the terms of the Store contract. The solution provided by the Store vendor may consist of staff from their personnel or through subcontracting with another vendor. At no time is the Department allowed to request that a specific subcontractor be utilized for the project ("marrying vendors"). If the Department feels that the solution provided by the Store vendor is not appropriate then they may request another quote/solution from this vendor or request quotes from other Store vendors. For some projects it will be necessary to contract with a specific vendor to provide required services outside of the Store through regular purchasing processes, i.e., proprietary software or hardware.

Generally speaking the process flow for ordering maintenance services through the Store is:

- Determine your requirements (i.e. onsite vs. carry-in, response time, loaners etc.)
- Contact the Store vendor(s) of your choice for a quote(s). (When requesting a quote you may put a time limitation for return of the quote to you from the vendor. Generally, for services only, Store vendors are required to respond within 7 days (excluding weekends). For purchases that are expected to exceed $100,000, Departments are required to request 3 quotes. A detailed justification is required to reject a low quote.)
- Review the final quote form(s) (Form 2).
- Have the appropriate department representative sign and date the form.
- As of August 15, 2009, enter your requisition into NFAMIS. For technology purchases only the new document type is "RT". Submit the form along with a screen print of the NFAMIS-Purchasing requisition to the CIO for review and approval by fax at (415) 581-3908 or by email to cio.review@sfgov.org. Urgent requests or appeals should be emailed to cio.appeal@sfgov.org. If you have questions regarding

the CIO approval, please contact Christine Martin, DT Chief of Staff, at (415) 581-4097.

- Once approved, the CIO will forward all supporting documentation to OCA for review, approval and processing.
- OCA may require additional documentation for review and approval purposes.

IMPORTANT THINGS TO KNOW

1. Forms: When requesting to order maintenance through the Technology Store, you must provide a valid quote from a Technology Store vendor using Form 2. (See Appendix E for a hardcopy of the form as well as a sample and user guide for completing it. The sample and user guide will assist you in filling out the form and it tells you which party is responsible for completing each field.) The form may be downloaded from the OCA website or the Document Library on the CCSF Intranet. Vendors also have copies of all forms for the purpose of preparing quotes. The vendor will prepare your quote on the form and submit it to you for review and acceptance. You are responsible for ensuring that the correct form is being used as well as ensuring that all required fields are filled in completely.

   Incomplete forms will be returned to the Department for completion and will not be approved by OCA Staff.

2. Delivery/Invoicing/Payment Address: When completing the Quote Approval form please be sure to fill in all fields for delivery, invoice and payment address information. Even if they are all the same it is important to have the correct information on the form. If the addresses are different it is important that this information be entered correctly into NFAMIS-Purchasing.

3. Competitive bidding: If you are ordering maintenance only you may call any Category 1 or 2 vendor or Category 3 Micro-LBE (Group GS093 Computer Maintenance and Services vendor). See Appendix A, B and C. Although the Technology Store contract is competitively bid with aggressive price caps identified, we strongly suggest that you contact all applicable store vendors to receive quotes for your purchase in order to encourage stronger competition. Departments are required to request 3 quotes for purchases exceeding $100,000. A detailed justification is required to reject a low quote.

4. Pricing: See Appendix A

5. Authorized provider: As applicable, vendors must be authorized by the manufacturer to maintain their products or to provide maintenance services through an authorized subcontractor, except where the manufacturer retains exclusive service rights to the equipment.

6. Prepayments: Generally, a department cannot authorize payment in advance of products or services. No prepayments are allowed. In some cases, prepayment is allowed for software maintenance services only. Be sure you fully understand the compliance requirements when using the Store for this purpose.

SECTION 4

REQUESTS FOR PROFESSIONAL SERVICES

GENERAL INFORMATION

Professional Services may encompass project management, software development, network installation, system design, training and many other services related to the identification and deployment of technology needs. It excludes sales and routine maintenance of hardware and most software. These are defined elsewhere in this manual.

We suggest that you discuss your project with OCA and DT staff very early in the planning stages to assist you in designing the best process for achieving a successful outcome. You should seek Professional Services through the Technology Store only after you have clearly defined the scope of the project and determined that the services are not available either through your staff or any other City department on a workorder basis. The City requires that all departments must use City personnel whenever and wherever possible. If you don't have the resources on your staff, DT or another department may have staff appropriate for your project.

If you do decide that your project requires the use of an outside vendor, you must be able to justify this decision.

The process for requesting Professional Services through the Technology Store can be lengthy. There are many things to consider as you are making your decision. The intent of this process is to ensure that you receive the maximum results for your project while being compliant with City legislation, policies and procedures.

The Process:

- Determine what services you need for the successful completion of your project.
- Check to see if the resources you need are available in your department or elsewhere in the City (i.e., DT, DPW, DPH, etc.). If not, then proceed to the next step. If you can utilize other City resources to perform the work, stop here.
- Contact the Category 1 Store vendor(s) of your choice for a quote(s). (Note: When requesting a quote you may put a time limitation for return of the quote to you from the vendor. For services, Store vendors are required to respond within 7 days, excluding weekends). It is highly recommended that **all** Category 1 vendors are contacted. For services that are expected to exceed $100,000, departments must request quotes from at least three vendors. A detailed justification is required to reject a low quote.
- Review Form 3 (Appendix E of this guide or on the Document Library on the CCSF Intranet) from the vendor with the description of services and costs. Any other substantiating documentation required should also be created at this time, e.g., Statement of Work.

- If you are satisfied with the quote, make sure all necessary information is on the form and have it signed by the appropriate IT purchasing authority in your Department and your accounting staff will create a requisition in NFAMIS-Purchasing for the order.
- As of August 15, 2009, enter your requisition into NFAMIS. For technology purchases only the new document type is "RT". Submit the form along with a screen print of the NFAMIS-Purchasing requisition and any supporting documentation i.e. Statement of Work to the CIO for review and approval by fax at (415) 581-3908 or by email to cio.review@sfgov.org. Urgent requests or appeals should be emailed to cio.appeal@sfgov.org. If you have questions regarding the CIO approval, please contact Christine Martin, DT Chief of Staff, at (415) 581-4097.
- If your request is for Professional Services you should submit the Local 21 webform at the same time as you submit your requisition for CIO review at http://www.ifpte21.org/sfitchapter/psc_info_request.shtml. Local 21 has 10 business days to raise an objection.
- Once approved, the CIO will forward all supporting documentation to OCA for review, approval and processing.
- If approved by the CIO and no objections are raised by Local 21, OCA will proceed with processing your request.
- OCA may require additional documentation for review and approval purposes.

IMPORTANT THINGS TO KNOW

Preparing for this process so that you get the best result possible for your department will require some "up front" work on your part. Although the Technology Store simplifies the process, you must be diligent in your efforts in making the most informed decisions possible about staffing a project. This includes making sure that you are compliant with all City laws, policies and procedures.

1. Start your planning early. Do not wait until the last minute to begin planning. The earlier you go through the preparatory process, the more smoothly your process will go. If you wait until the last minute to begin this process you will encounter delays.

    a. Determine the requirements for your project.
    b. Determine if the internal staffing resources are available to perform the work.
    c. If the internal staffing resources are not available, determine if there are any other City staff to perform the work through a workorder.
    d. If no other City staff are available for this project, then you may contact one or more Store vendors with your requirements and request a quote for services. Your request for quote should include a request for a plan for the vendor to transition the project to City staff, who will maintain and support the project on an ongoing basis. The plan should include training for this purpose.

2. Local 21: Local 21 will review all requests for Professional Services through the Technology Store. The process will assure Local 21 membership that all efforts are being made to utilize City employees to perform the work before sending the work to an outside provider.

At the same time the Form 3, supporting documentations and NFAMIS-Purchasing requisition is submitted to the CIO, you must complete Local 21's webform designed to assist them in reviewing your project. It can be found at: http://www.ifpte21.org/sfitchapter/psc_info_request.shtml. We suggest that you contact Local 21 at 864-2100 (the current contact is Pam Covington, pcovington@ifpte21.org) to discuss your project as early in the process as possible. Local 21 will have ten business days from the date of receipt to review the project. If Local 21 has no objections they will notify the department and OCA of this by email. If Local 21 does object to the request for services they will contact the department and attempt to resolve the issue directly with you. If the department and Local 21 cannot resolve the disagreement, the Department shall submit the request through the normal Civil Service Commission for determination.

3. "Pass throughs" / "Marrying vendors": This is what happens when a Department decides that it wants to hire a particular vendor for a project that is not part of the Technology Store. The Department contacts a Store vendor and instructs them to subcontract with this pre-determined vendor. This is not allowed**.** If a Department determines that its project requirements can only be filled by a specific vendor because that vendor has a unique set of skills that are not available anywhere else, or there is a proprietary issue, then the Department should consider requesting a Sole Source waiver from OCA/HRC.

   If you have any questions about this please contact OCA Staff to discuss before proceeding.

4. Forms: When ordering professional services through the Technology Store, you must use Form 3. (See Appendix E for a hardcopy of the form as well as a sample and user guide for completing it. The sample and user guide will assist you in filling out the form and it tells you which party is responsible for completing each field.) The form may be downloaded from the Document Library on the City Intranet. Vendors also have copies of all forms. The vendor will prepare your quote on the form and submit it to you for review and acceptance. You are responsible for ensuring that the correct form is being used as well as ensuring that all required fields are filled in completely. Incomplete forms will be returned to the Department for completion and will not be approved.

5. Delivery/Invoicing/Payment Address: When completing the Quote Approval form, please be sure to fill in all fields for delivery, invoice and payment address information. Even if they are all the same it is important to have the correct information on the form. If the addresses are different it is important that this information be entered correctly into NFAMIS-Purchasing.

6. Signatures: Every form submitted to OCA for professional services must be signed by the appropriate department representative.

7. Competitive bidding: We encourage you to call all Category 1 Store vendors for a quote on services. Although the Store contract is competitively bid with aggressive rate caps identified (see Appendix A), we strongly suggest that you contact all Category 1 Store

vendors to encourage competition. Departments are required to request three quotes for orders exceeding $100,000.

8. Order Cancellations: Your Department may cancel an order for professional services at any time. However, be aware that you will likely be required to pay for any services or products received prior to cancelling the order.

9. Prepayments: Under no circumstances can a Department authorize payment in advance of delivery of services. No prepayments are allowed.

10. Progress Payments: For large or complex projects that may be long in duration, OCA does recommend as an alternative that progress payments are made based on the receipt of specific deliverables. Departments should carefully schedule payments and deliverables over the life of the project. The size of the progress payment should be related to the deliverable performed. With a final payment upon completion and acceptance of the project.

11. 10% Retention: For professional services projects over $100,000, OCA recommends that departments retain 10% of every invoice submitted for a project. The Store vendor will acknowledge this on every invoice submitted to the Department for payment. At the end of a project, if the Department accepts the project as completed in full, the vendor will submit a final invoice in the amount of the 10% that has been retained by the Department. The Department should carefully review the project and the final invoice before a request for payment is submitted to the Controller. The Department is responsible for tracking the 10% retention and payments. For example: If a vendor submits an invoice for $10,000 the Department will authorize payment for $9,000. The remaining 10% will be encumbered when the final invoice is paid for the total of the 10% retained.

    If a vendor breaches the agreement to provide services in any way, (including not paying subcontractors/vendors), the City retains the right to use whatever monies are in the 10% retained to pay towards the completion of the project. This includes paying monies owed to the subcontractors/vendors by the Store vendor.

12. Vendor Contracts other than Technology Store vendors: A department should never sign a separate contract with a vendor for professional services. The contract between the City and the Technology Store vendors is the governing contract for any goods or services acquired through the Store. Some vendors may request that you sign or initial the Statement or Scope of Work ("SOW"). The SOW may not add, change or delete any of the Technology Store contract terms and conditions.

13. Hourly Rates: See Appendix A

14. Bonds: Projects that are high in dollar value, complex, long term or high risk, may merit a Performance Bond or Labor and Materials Bond. A performance bond is requested when the City requires guarantee of performance of all obligations in a contract. A labor and materials bond is requested when the City requires guarantee that a vendor will pay

for all labor and materials and subcontracted work under the contract. Bonds should be considered on a project by project basis weighing added cost, risk factors and the protection offered by various bonding options. Departments may consult with the Risk Manager, City Attorney or OCA for assistance in determining whether or not a bond would be recommended for your situation.

PROJECT CHECKLIST

No two Professional Service requests are alike, however for every request there are documents to submit and procedures to follow.

To assist you in your preparation of a request for services, we have prepared a checklist for your use.

SAMPLE PROJECT CHECKLIST

CHECK	ACTION ITEM
	Meet with Department staff affected by this project.
	Complete a preliminary Scope of Work with project requirements.
	Review the project requirements with DT.
	Discuss project requirement with Store vendor(s).
	Request quote and supporting documentation from Store vendor(s).
	Review the quote for content accuracy and form.
	Complete Form 3.
	Have Form 3 signed by the Department IT Manager and/or Department Head.
	Prepare all required supporting documentation.
	Submit the project to CIO and Local 21 for review.
	No objections raised by Local 21 or issues resolved.
	No objections raised by CIO or issues resolved.
	Prepare a milestones to payments schedule.
	If required, Store vendor submits a Bond.
	If required, prepare a Cost Benefit Analysis.
	If required, prepare a Risk Analysis
	If required, submit a detailed list of subcontractors with contact information, names of staff working on project and payment schedule from Store vendor to subcontractor.
	If required, submit a copy of the Agreement between the subcontractor(s) and the Store vendor.
	If required, notify the Store vendor that the 10% retention policy will be in effect for this project.

While we have attempted to include as much information in this section as possible to assist you in your project preparations, you may still have questions. As always, we encourage you to contact OCA Staff if you have any questions about the process or how you should proceed.

SECTION 5

UTILIZING CATEGORY 3 CONTRACTS

MICRO – LBEs

GENERAL INFORMATION

The City's LBE Ordinance includes a Pilot Set Aside program for competitive award to local businesses certified as Micro-LBEs. As part of the Technology Store, the City has awarded several contracts of up to $100,000 to small local business certified as Micro-LBEs as providers of: 1) Computer Hardware, Software and Peripheral Equipment (EQ108) and 2) Computer Maintenance and Repair Services (GS093). See APPENDIX C for a list of Category 3 vendors.

Although the same forms are used by vendors to quote products and maintenance purchased from Category 3 vendors, the process flow differs as follows:

- Determine your requirements for products or maintenance.
- Contact the Category 3 Store vendor(s) of your choice for a quote(s). (Note: When requesting a quote you may put a time limitation for return of the quote to you from the vendor. For products, that time limit is 48 hours and for services only, Store vendors are required to respond within 7 days (excluding weekends).
- Review the final quote form(s) (Form 1 or 2).
- Follow your department's internal procedure for purchase approvals.
- As of August 15, 2009, enter your requisition into NFAMIS. For technology purchases only the new document type is "RT". Submit the form along with a screen print of the NFAMIS-Purchasing requisition to the CIO for review and approval by fax at (415) 581-3908 or by email to cio.review@sfgov.org. Urgent requests or appeals should be emailed to cio.appeal@sfgov.org. If you have questions regarding the CIO approval, please contact Christine Martin, DT Chief of Staff, at (415) 581-4097.
- Once approved, the CIO will forward all supporting documentation to OCA for review, approval and processing.
- OCA may require additional documentation for review and approval purposes.

IMPORTANT THINGS TO KNOW

Please note that Category 3 set aside contracts are limited to orders totaling $100,000. The blanket purchase orders associated with these contracts will not be increased to exceed this amount. At no time can BPO Releases exceed the amount remaining on the blanket.

Example:

City departments submit releases against Vendor X's BPO in the following order:

DPW	$ 5,000	
PUC	$ 75,000	
Controller	$ 19,000	subtotal: $99,000
DT	$ 8,000	

The first three orders total $99,000. DT's order is in excess of the $100,000 contract cap. DT has the option of decreasing their order to $1,000 or less, or purchasing from another vendor.

SECTION 6

LEASE ORDERING THROUGH THE COMPUTER STORE

GENERAL INFORMATION

IN DEVELOPMENT

APPENDIX A

CATEGORY 1

SERVICES AND PRODUCTS
VENDOR CONTACT INFORMATION
PRICING INFORMATION

Category 1 – Products and Services

CCT Technologies, Inc. **dba ComputerLand of Silicon Valley** 478 West San Carlos St. San Jose, CA 95110 SF Branch: 580 California St., Ste. 500 San Francisco, CA 94104 Main Fax: 415-283-3387 All quote requests to: SFGovSales@cland.com Vendor ID #: 67883 **Category 1 – Products and Services** TC95251	Gilbert Kwong, Acct. Mgr. Ph: 415-283-3388 Cell: 415-601-4273 Email: gkwong@cland.com Wilson Tang, Acct. Rep. 2 Ph: 415-283-3389 Cell: 415-359-6028 Email: wtang@cland.com

Cornerstone Technology Partners, JV 44 Montgomery St., Ste. 3360 San Francisco, CA 94104-4806 Main Fax: 415-705-7801 Vendor ID #: 78020 **Category 1 – Products and Services** TC95252	Derek Lawson, Acct. Rep. 1 Ph: 415-705-7800 x228 Cell: 650-722-1924 Email: dlawson@cornerstoneconcilium.com Martin Banas, Acct. Rep. 2 Ph: (415) 705-7800 ext 231 Email: mbanas@cornerstoneconcilium.com

Category 1 – Products and Services

En Pointe Technology Sales, Inc. 1 California St., Ste. 2800 San Francisco, CA 94111-5429 So. Cal Branch: 18701 S. Figueroa Street Gardena, CA 90248-4506 Main Fax: 415-765-7121 Vendor ID #: 58893 **Category 1 – Products and Services** TC95253	Mac McConnell, Sr. Acct. Exec. Ph: 415-765-7104 Toll Free: 866-457-1383 Cell: 650-996-7269 Email: mmcconnell@enpointe.com Katheleen Jackson, Inside Acct. Mgr. Ph: 310-337-5206 Toll Free: 800-800-4214 x5206 Email: kjackson@enpointe.com

Xtech JV 1275 Fairfax Ave., Ste. 201 San Francisco, CA 94124-1759 Fax: 415-643-0108 Toll Free:866-983-2458 All quote requests to: **Sales@XtechJV.com** Vendor ID #: 64607 **Category 1 – Services and Products** TC95254	Brad Baker, Acct. Mgr. (Services) Ph: 415-355-9090 Cell: 415-385-6785 Email: bbaker@XtechJV.com Todd Sparks, Acct. Mgr. (Infrastructure) Ph: 415-285-3292 Cell: 415-238-2594 Email: tsparks@XtechJV.com David Harmon, Acct. Rep. 3 Ph: 415-285-3292 Email: dharmon@XtechJV.com James Finley, Acct. Rep. 4 Ph: 415-285-3292 Cell: 415-264-3407 Email: jfinley@XtechJV.com

Dell

Percent Discounts off Manufacturer's List Prices

	ComputerLand of Silicon Valley	Cornerstone Consulting & Technologies	En Pointe	Xtech
Workstations	23	8	19.25	25
Laptops	18	8	14	23
Printers	3	8	2	25
Peripheral Equipment	39	8	25	25
Routers	39	N/B	20	28
Servers	28	8	24	25
Fiber Switches	39	N/B	20	24
Storage Network Devices	39	8	20	24
Network Attach Storage	39	8	20	24
Network Software	39	5	25	22
Tape Libraries	39	8	20	18

N/B = No bid, vendor is ineligible to quote these products

Hewlett Packard

Percent Discounts off Manufacturer's List Prices

	ComputerLand of Silicon Valley	Cornerstone Consulting & Technologies	En Pointe	Xtech
Workstations	32	12	30	30
Laptops	22	3	19	20
Printers	25	20	22.50	25
Peripheral Equipment	31	6	19	20
Routers	25	22	34	34
Servers	26	6	21	25
Fiber Switches	31	35	11	24
Storage Network Devices	31	8	3.25	22
Network Attach Storage	31	8	14	22
Network Software	31	17	27	24
Tape Libraries	31	10	12	20

N/B = No bid, vendor is ineligible to quote these products

Cisco
Percent Discounts off Manufacturer's List Prices

	ComputerLand of Silicon Valley	Cornerstone Consulting & Technologies	En Pointe	Xtech
Routers	38	35	33.5	34
Servers	38	N/B	33.5	38
Fiber Switches	38	35	33.5	34
Storage Network Devices	38	N/B	33.5	38
Network Attach Storage	38	N/B	33.5	38
Network Software	38	10	33.5	34
Tape Libraries	38	N/B	33.5	38

IBM
Percent Discounts off Manufacturers' List Prices

	ComputerLand of Silicon Valley	Cornerstone Consulting & Technologies	En Pointe	Xtech
Routers	39	N/B	11	29
Servers	39	N/B	11	25
Fiber Switches	39	N/B	11	28
Storage Network Devices	39	N/B	14	28
Network Attach Storage	39	N/B	14	25
Network Software	39	N/B	12	28
Tape Libraries	39	N/B	12	29

N/B = No bid, vendor is ineligible to quote these products

Percentage Markups for all other Manufacturer's Products

	ComputerLand of Silicon Valley		Cornerstone Consulting & Technologies		En Pointe		Xtech	
	1-23 units	24 units and up	1-23 units	24 units and up	1-23 units	24 units and up	1-23 units	24 units and up
Laptops	2	2	8	5	7.5	5.25	8	5
Desktops	2	2	8	5	6.5	4.25	8	5
Servers	2	2	8	5	6.5	4.25	10	6
Printers	2	2	8	5	8.5	6.50	6	4
Monitors	2	2	8	5	7.5	6.50	8	5
Accessories	2	2	10.5	7.5	10	7.50	10	8
Software	2	2	10.5	7.5	8.75	6.50	9	7
Surveillance cameras	2	2	10.5	7.5	10	8.50	8	6
Enterprise Networking Equipment	2	2	8	5	10	7.50	6	4
Other	2	2	10.5	7.5	10	7.50	6	4

Hourly Rates for Technical Services

	ComputerLand of Silicon Valley	Cornerstone Consulting & Technologies	En Pointe	Xtech
Onsite installation of a stand alone PC	$65	$85	$65	$60
On site installation of a networked PC	$65	$85	$65	$80
Installation of a small LAN (Under $25,000)	$100	$130	$115	$110
Installation of a large LAN ($25,000 or more)	$110	$150	$125	$125
Depot Services repair of out of warranty PC	$65	$90	$77	$90
Depot Services repair of out of warranty printer	$65	$90	$77	$90
On-site service repair of out of warranty PC	$90	$100	$100	$90
On-site service for server	$110	$135	$135	$165
Network installation Onsite	$110	$135	$125	$125
4 hour on-site response for network server	$150	$160	$110	$165
2 hour on-site response for network server	$175	$205	$160	$195
Network design consulting	$150	$205	$140	$225
End-user training	$80	$125	$75	$125
Network administrator training	$120	$150	$100	$80
Custom programming (Ms-Access, Visual Basic, etc.)	$100	$135	$147	$125

Hourly Rates by Job Titles

	ComputerLand of Silicon Valley		Cornerstone Consulting & Technologies		En Pointe		Xtech	
	Emp. or Sub.	Hourly Rate	Emp. or Sub.	Hourly Rate	Emp. or Sub.	Hourly Rate	Emp. or Sub.	Hourly Rate
Network Engineer	E	$120	E	$130	E/S	$125	E/S	$165
PC IMAC Tech	S	$65	S	$90	E/S	$65	E	$110
Desktop Support	S	$65	S	$90	E/S	$65	E/S	$110
Help Desk Support	S	$40	E	$90	E/S	$65	E	$80
Project Manager	E	$100	E	$135	E	$135	E	$150
Field Installer and Support	S	$65	S	$95	E/S	$65	E/S	$80
Web Engineer and Support	E	$80	E	$125	E/S	$125	E	$80
Network Operations Support	S	$75	E	$125	E	$115	E	$110
System Integrator	S	$100	E	$130	E/S	$115	E/S	$80
Technical Consultant	E	$120	E/S	$205	E/S	$140	E/S	$225
Applications Installer and Support	S	$100	E	$160	E/S	$85	E	$80
Internet Technology Strategist	E	$120	E/S	$160	E/S	$140	E	$80
Systems Analyst	E	$80	E	$150	E/S	$160	E	$100
E-Business Strategist	E	$120	E	$160	E	$100	E	$80
Internet Security Specialist	E	$150	E/S	$160	E	$125	E	$80
Requirements Analyst	S	$90	E	$135	E/S	$160	E	$150
Software Developer	S	$95	E/S	$130	E/S	$147	E	$150

APPENDIX B

CATEGORY 2

PRODUCTS

VENDOR CONTACT INFORMATION
PRICING INFORMATION

Category 2 – Products

CCT Technologies, Inc.
dba ComputerLand of Silicon Valley
478 West San Carlos St.
San Jose, CA 95110

SF Branch:
580 California St., Ste. 500
San Francisco, CA 94104

Main Fax: 415-283-3387

All quote requests to:

SFGovSales@cland.com

Vendor ID #: 67883

Category 2 – Products

TC95255

Gilbert Kwong, Acct. Mgr.

Ph: 415-283-3388
Cell: 415-601-4273
Email: gkwong@cland.com

Wilson Tang, Acct. Rep. 2

Ph: 415-283-3389
Cell: 415-359-6028
Email: wtang@cland.com

En Pointe Technology Sales, Inc.
1 California St., Ste. 2800
San Francisco, CA 94111-5429

So. Cal Branch:
18701 S. Figueroa Street
Gardena, CA 90248-4506

Main Fax: 415-765-7121

Vendor ID #: 58893

Category 2 – Products

TC95256

Mac McConnell, Sr. Acct. Exec.

Ph: 415-765-7104
Toll Free: 866-457-1383
Cell: 650-996-7269
Email: mmcconnell@enpointe.com

Katheleen Jackson, Inside Acct. Mgr.

Ph: 310-337-5206
Toll Free: 800-800-4214 x5206
Email: kjackson@enpointe.com

Xtech JV 1275 Fairfax Ave., Ste. 201 San Francisco, CA 94124-1759 Fax: 415-643-0108 Toll Free: 866-983-2458 All quote requests to: **Sales@XtechJV.com** Vendor ID #: 64607 **Category 2 – Products** TC95257	Brad Baker, Acct. Mgr. (Services) Ph: 415-355-9090 Cell: 415-385-6785 Email: bbaker@XtechJV.com
	Todd Sparks, Acct. Mgr. (Infrastructure) Ph: 415-285-3292 Cell: 415-238-2594 Email: tsparks@XtechJV.com
	David Harmon, Acct. Rep. 3 Ph: 415-285-3292 Email: dharmon@XtechJV.com
	James Finley, Acct. Rep. 4 Ph: 415-285-3292 Cell: 415-264-3407 Email: jfinley@XtechJV.com

Hewlett Packard

Percent Discounts off Manufacturer's List Prices

	ComputerLand of Silicon Valley	En Pointe	Xtech
Workstations	32	30	30
Laptops	22	19	20
Printers	25	22.50	25
Peripheral Equipment	31	19	20
Routers	25	34	34
Servers	26	21	25
Fiber Switches	31	11	24
Storage Network Devices	31	3.25	22
Network Attach Storage	31	14	22
Network Software	31	27	24
Tape Libraries	31	12	20

Dell

Percent Discounts off Manufacturer's List Prices

	ComputerLand of Silicon Valley	En Pointe	Xtech
Workstations	23	19.25	25
Laptops	18	14	23
Printers	3	2	25
Peripheral Equipment	39	25	25
Routers	39	20	28
Servers	28	24	25
Fiber Switches	39	20	24
Storage Network Devices	39	20	24
Network Attach Storage	39	20	24
Network Software	39	25	22
Tape Libraries	39	20	18

Cisco
Percent Discounts off Manufacturer's List Prices

	ComputerLand of Silicon Valley	En Pointe	Xtech
Routers	38	33.5	34
Servers	38	33.5	38
Fiber Switches	38	33.5	34
Storage Network Devices	38	33.5	38
Network Attach Storage	38	33.5	38
Network Software	38	33.5	34
Tape Libraries	38	33.5	38

IBM
Percent Discounts off Manufacturers' List Prices

	ComputerLand of Silicon Valley	En Pointe	Xtech
Routers	39	11	29
Servers	39	11	25
Fiber Switches	39	11	28
Storage Network Devices	39	14	28
Network Attach Storage	39	14	25
Network Software	39	12	28
Tape Libraries	39	12	29

Percentage Markups for all other Manufacturer's Products

	ComputerLand of Silicon Valley		En Pointe		Xtech	
	1-23 units	24 units and up	1-23 units	24 units and up	1-23 units	24 units and up
Laptops	2	2	7.5	5.25	8	5
Desktops	2	2	6.5	4.25	8	5
Servers	2	2	6.5	4.25	10	6
Printers	2	2	8.5	6.50	6	4
Monitors	2	2	7.5	6.50	8	5
Accessories	2	2	10	7.50	10	8
Software	2	2	8.75	6.50	9	7
Surveillance cameras	2	2	10	8.50	8	6
Enterprise Networking Equipment	2	2	10	7.50	6	4
Other	2	2	10	7.50	6	4

APPENDIX C

CATEGORY 3

MICRO-LBE SET-ASIDE VENDORS

VENDOR CONTACT INFORMATION
PRICING INFORMATION

Category 3 – Micro-LBE Set-Aside Vendors

Products – EQ108

Ameritech Computer Services, Inc. 2688 Third Street. San Francisco, CA 94107 Main Fax: 415-282-7788 Vendor ID #: 62025	Herrick Loi, Managing Principal Ph: 415-282-6500 Email: herrick@ameritechcomputer.com **Products:** TC95258

Bridge Micro 2091 – 22nd Avenue San Francisco, CA 94116 Main Fax: 415-902-1075 Vendor ID #: 46149	Byron Ling, President Ph: 415-902-1075 Email: byron.ling@sbcglobal.net **Products:** TC95259

Category 3 – Micro-LBE Set-Aside Vendors

Products – EQ108

Now Electronics dba Sweet Memory **Now Electronics dba Sweet Memory** 115 Sansome St. #101, Ground Floor San Francisco, CA 94104 Main Fax: 415- 288-9468 Vendor ID #: 34542	Sam Zaghbaba Ph: Ph: 415-288-9470 Email: sales@sweetmemory.com **Products:** TC95260

Toptek Micro Center Inc. 1520 Taraval Street San Francisco, CA 94116 Main Fax: 415-564-4732 Vendor ID #: 18565	Julian Lee Ph: 415-564-3500 Email: toptek@pacbell.net **Products:** TC95261

Category 3 – Micro-LBE Set-Aside Vendors

Maintenance Services – GS093

Ameritech Computer Services, Inc. 2688 Third Street. San Francisco, CA 94107 Main Fax: 415-282-7788 Vendor ID #: 62025	Herrick Loi, Managing Principal Ph: 415-282-6500 Email: herrick@ameritechcomputer.com **Maintenance Services:** TC95262

Beta Nineties Computer Inc. 120 Howard Street, Suite B San Francisco, CA 94105 Main Fax: 415-974-1575 Vendor ID #: 24602	James Tang Ph: 415-974-1188 Email: jimt@beta90.com **Maintenance Services:** TC95263

Now Electronics dba Sweet Memory 115 Sansome St. #101, Ground Floor San Francisco, CA 94104 Main Fax: 415-288-9468 Vendor ID #: 34542	Sam Zaghbaba Ph: 415-288-9470 Email: sales@sweetmemory.com **Maintenance Services:** TC95264

EQ108 Hardware/Software and Peripheral Equipment
Percentage Markups

	Ameritech Computer Services	Bridge Micro	Now Electronics dba Sweet Memory	Toptek Micro Center, Inc.
Computer Hardware & Peripherals	5	10	5	5
Software	5	10	5	4
Supplies	5	12	5	7
Accessories	5	12	5	7

GS093 Computer Maintenance and Repair Services
Hourly Rates

	Ameritech Computer Services	Beta Nineties Computer Inc.	Now Electronics dba Sweet Memory
On-site installation of a stand-alone PC	$79	$50	$65
On-site installation of a networked PC	$79	$55	$85
Depot service repair of out-of-warranty PC	$65	$45	$65
Depot service repair of out-of-warranty printer	$65	$60	$95
On-site service repair of out-of-warranty PC	$95	$55	$85
On-site service repair of out-of-warranty printer	$125	$75	$105
On-site service for server	$99	$90	$115
4-hour on-site response for network server	$125	$95	$135
2-hour on-site response for network server	$150	$100	$155

APPENDIX D
OFFICE OF CONTRACT ADMINISTRATION
CONTACT INFORMATION

CITY AND COUNTY OF SAN FRANCISCO
CITY HALL
1 DR. CARLTON B. GOODLETT PLACE
ROOM 430
SAN FRANCISCO, CA. 94102

Diane Handa Purchaser 415-554-6913 phone 415-554-4047 fax diane.handa@sfgov.org	Patrick Rice Senior Purchaser 415-554-6734 phone 415-554-4047 fax patrick.rice@sfgov.org
Jaci Fong Manager IT Purchasing 415-554-6701 phone 415-554-4047 fax jaci.fong@sfgov.org	James Flowers Senior Purchaser 415-554-6740 415-554-4047 fax james.flowers@sfgov.org
Bill Jones Assistant Director 415-554-6730 phone 415-554-4807 fax bill.jones@sfgov.org	Naomi Kelly Director 415-554-6743 phone 415-554-4807 fax naomi.kelly@sfgov.org

Appendix E

FORMS

- **Form 1 – Products**
- **Form 2 – Maintenance**
- **Form 2 – Professional Services**

OFFICE OF CONTRACT ADMINISTRATION

GUIDE FOR TECHNOLOGY STORE FORM 1
FOR PRODUCT ORDERING

The purpose of this User Guide is to assist you (Dept. Contact and Vendor Contact) in completing the necessary Quote Request/Approval Form. The following chart defines what information is required in each field of the form for the purchase of hardware/software ordering. The department representative should verify all information before submission to OCA for review/approval.

FORM 1 FIELD DEFINITIONS:

BOX #	FIELD NAME	COMPLETED BY	FIELD DEFINITION
1	Dept./Agency & #	**Vendor/Dept.**	Name & number of department, division, commission, office, etc., placing the order.
2	Ordered By:	**Vendor/Dept.**	Name of the department representative responsible for the order.
3	Dept. Contact Phone #:	**Vendor/Dept.**	Phone number of the department contact placing the order.
4	Index Code:	**Dept.**	Budget account number.
5	Subobject:	**Dept.**	Budget detail number.
6	Requisition #:	**Dept.**	Generated by the department purchasing staff/NFAMIS-PURCHASING.
7	Department Approval (Signature & Date):	**Dept.**	Signature of an appropriate department representative with authority to sign off on IT purchases.
8	Other Approval (Signature & Date):	**Dept.**	Optional – 2nd department signature.
9	CIO/DT Approval (Signature & Date):	**CIO/DT**	Signature and date signed by the CIO/DT
10	COIT Project/Folio No.:	**COIT**	Assigned by COIT Staff.
11	Quote Date:	**Vendor**	Date the quote is made by the Store vendor.
12	Quote #:	**Vendor**	Assigned by the vendor.
13	Quote Expiration Date:	**Vendor**	Actual date the quote will no longer be valid. Usually 30 days after Quote Date.
14	Quoted By:	**Vendor**	Name of the vendor representative responsible for the quote.
15	Vendor Phone #:	**Vendor**	Phone number of the vendor representative responsible for the order.
16	Vendor ID#/ Contract #:	**Vendor**	Unique identifying number in NFAMIS-PURCHASING assigned to each vendor.
17	Vendor Signature:	**Vendor**	Signature of the vendor representative responsible for the order.
18	Vendor Information:	**Vendor**	Name, address, phone number and contact name of the vendor from whom the purchase is being made.
19	Deliver To:	**Dept.**	Name, address, phone number and contact name where products will be delivered.
20	Dept. Bill To Address:	**Dept.**	Address to which the vendor will mail the invoice.
21	Vendor Remittance Address:	**Vendor**	Address information where the City should mail payment for this order.
22	Special Instructions/ Requirements:	**Vendor/Dept.**	Optional – use if there are any instructions for the order other than Delivery Instructions
23	Item No.:	**Vendor**	Sequence number assigned to each individual item ordered.
24	Quantity:	**Vendor**	Amount of each item purchased.
25	Price Per Unit:	**Vendor**	Dollar amount of each individual item being ordered.
26	Part Number:	**Vendor**	Part number assigned by manufacturer/provider.
27	Description:	**Vendor**	Detailed description of the product being purchased.
28	Extended Amount:	**Vendor**	Amount extended from the Quantity and the Price Per Unit.
29	Total of this page:	**Vendor**	The dollar amount of items listed on this page only.
30	Subtotal of Following Pages:	**Vendor**	The subtotaled dollar amount of any pages other than page one.
31	Quote Subtotal:	**Vendor**	Enter the total dollar amount of all pages.
32	Sales Tax:	**Vendor**	Enter the California state sales tax percentage for the “Quote Subtotal” .
33	Calif. Recycle Fee:	**Vendor**	Fee required by State law to be added to each monitor purchase. Amount varies
34	Grand Total of Quote:	**Vendor**	Final order amount by combining the “Quote Subtotal” and the “Sales Tax”.
35	Calculate 1.9%Fee:	**Vendor**	Administrative Fee.

To be inserted

OFFICE OF CONTRACT ADMINISTRATION

GUIDE FOR TECHNOLOGY STORE FORM 2
FOR MAINTENANCE ORDERING

The purpose of this User Guide is to assist you (Dept. Contact and Vendor Contact) in completing the necessary Quote Request/Approval Form. The following chart defines what information is required in each field of the form for the acquisition of hardware/software maintenance. The department representative is responsible for verifying all information before submission to OCA for review/approval.

FORM 2 FIELD DEFINITIONS:

BOX #	FIELD NAME	COMPLETED BY	FIELD DEFINITION
1	Dept./Agency & #	**Vendor/Dept.**	Name & number of department, division, commission, office, etc., placing the order.
2	Ordered By:	**Vendor/Dept.**	Name of the department representative responsible for the order.
3	Dept. Contact Phone #:	**Vendor/Dept.**	Phone number of the department contact placing the order.
4	Index Code:	**Dept.**	Budget account number.
5	Subobject:	**Dept.**	Budget detail number.
6	Requisition #:	**Dept.**	Generated by the department purchasing staff/NFAMIS-PURCHASING.
7	Department Approval (Signature & Date):	**Dept.**	Signature of an appropriate department representative with authority to sign off on IT purchases.
8	Other Approval (Signature & Date):	**Dept.**	Optional – 2nd department.
9	CIO/DT Approval (Signature & Date):	**CIO/DT**	Signature and date signed by the CIO/DT.
10	COIT Project/Folio No.:	**COIT**	Assigned by the COIT Staff.
11	Quote Date:	**Vendor**	Date the quote was prepared by the Store vendor.
12	Quote #:	**Vendor**	Assigned by the Store vendor.
13	Quote Expiration Date:	**Vendor**	Actual date the quote will no longer be valid. Usually 30 days after Quote Date.
14	Quoted By:	**Vendor**	Name of the Store vendor representative responsible for the quote.
15	Vendor Phone #:	**Vendor**	Phone number of the Store vendor representative responsible for the order.
16	Vendor ID#/Contract#:	**Vendor**	Unique identifying number in NFAMIS-PURCHASING assigned to each vendor.
17	Vendor Signature:	**Vendor**	Signature of the Store vendor representative responsible for the order.
18	Vendor Information:	**Vendor**	Name, address, phone number and contact name of the Store vendor from whom the purchase is being made.
19	Deliver To:	**Dept.**	Name, address, phone number and contact name where services will be provided.
20	Dept.Bill To Address:	**Dept.**	Address to which the Store vendor will mail the invoice.
21	Vendor Remittance Address:	**Vendor**	Address information where the City should mail payment for this order.
22	Special Instructions/ Requirements:	**Vendor/Dept.**	Optional – use if there are any instructions for the order other than Delivery Instructions
23	Service History:	**Dept.**	Indicate if this is a new order or a renewal of an existing order.
24	Start Date:	**Dept.**	Enter the anticipated beginning and ending dates of this service.
25	Subcontractor Information:	**Vendor**	Enter all subcontractor contact information. If more than one, attach a separate document.
26	Additional Documents:	**Dept.**	Enter Yes or No to indicate if you are submitting supporting documentation.
27	Item No.:	**Vendor**	Sequence number assigned to each individual item ordered.
28	Quantity:	**Vendor**	Amount of each item performed.
29	Price Per Unit:	**Vendor**	Dollar amount of each individual item being ordered.
30	Part Number:	**Vendor**	Part number assigned by manufacturer/provider.
31	Description:	**Vendor**	Detailed description of the maintenance product/service being ordered.
32	Amount:	**Vendor**	Amount extended from the Quantity and the Price Per Unit.
33	Total of this page:	**Vendor**	The dollar amount of items listed on this page only.
34	Subtotal of Following Pages:	**Vendor**	The subtotaled dollar amount of any pages other than page one.
35	Quote Subtotal:	**Vendor**	Enter the total dollar amount of all pages.
36	Sales Tax:	**Vendor**	Enter the California state sales tax percentage for the “Quote Subtotal”.
37	Grand Total of Quote:	**Vendor**	Final order amount by combining the “Quote Subtotal” and the “Sales Tax”.
38	Calculate 1.9%Fee:	**Vendor**	Administrative Fee.

To be inserted

OFFICE OF CONTRACT ADMINISTRATION

GUIDE FOR TECHNOLOGY STORE FORM 3

FOR PROFESSIONAL SERVICES

The purpose of this User Guide is to assist you (Dept. Contact and Vendor Contact) in completing the necessary Quote Request/Approval Form. The following chart defines what information is required in each field of the form for the ordering professional services. The department representative is responsible for verifying all information before submission for review/approval.

FORM 3 FIELD DEFINITIONS:

BOX #	FIELD NAME	COMPLETED BY	FIELD DEFINITION
1	Dept./Agency & #	**Vendor/Dept.**	Name & number of department, division, commission, office, etc., placing the order.
2	Ordered By:	**Vendor/Dept.**	Name of the department representative placing the order.
3	Dept. Contact Phone #:	**Vendor/Dept.**	Phone number of the department contact placing the order.
4	Index Code:	**Dept.**	Budget account number.
5	Subobject:	**Dept.**	Budget detail number.
6	Requisition #:	**Dept.**	Generated by the department purchasing staff/NFAMIS-PURCHASING.
7	Department Approval (Signature & Date):	**Dept.**	Signature of an appropriate department representative with authority to sign off on IT purchases
8	Other Approval (Signature & Date):	**Dept.**	Optional – 2nd department signature and date.
9	CIO/DTApproval (Signature & Date):	**CIO/DT**	Signature and date signed by the CIO.
10	COIT Project/Folio No.:	**COIT**	Assigned by the COIT Staff.
11	Quote Date:	**Vendor**	Date the quote was prepared by the Store vendor.
12	Quote #:	**Vendor**	Assigned by the Store vendor.
13	Quote Expiration Date:	**Vendor**	Actual date the quote will no longer be valid. Usually 30 days after Quote Date.
14	Quoted By:	**Vendor**	Name of the Store vendor representative responsible for the quote.
15	Vendor Phone #:	**Vendor**	Phone number of the Store vendor representative responsible for the order.
16	Vendor ID#/Contract#:	**Vendor**	Unique identifying number in NFAMIS-PURCHASING assigned to each vendor.
17	Vendor Signature:	**Vendor**	Signature of the Store vendor representative responsible for the order.
18	Vendor Information:	**Vendor**	Name, address, phone number and contact name of the Store vendor from whom the purchase is being made.
19	Deliver To:	**Dept.**	Name, address, phone number and contact name where services will be delivered.
20	Dept. Bill To Address:	**Dept.**	Address to which the Store vendor will mail the invoice.
21	Vendor Remittance Address:	**Vendor**	Address information where the CCSF should mail payment for this order.
22	Special Instructions/ Requirements:	**Vendor/Dept.**	Optional – use if there are any instructions for the order other than Delivery Instructions
23	Contract History:	**Dept.**	Complete boxes for a new or renewed agreement as well as beginning and end dates.
24	10% Retention Required	**Dept.**	Whether or not the 10% Retention is required for this project please enter Yes or No.
25	Local 21 Review:	**Dept.**	Indicate the correct response to each question by entering Yes or No.
26	Bond Required	**Dept./OCA**	If a bond is required for this project, please enter Yes or No.
27	Subcontractor Information	**Vendor**	Enter all subcontractor contact information. If more than one, attach a separate document.
28	Additional Documents:	**Dept.**	If you have to attach supporting documentation, please enter Yes or No.
29	Project Summary:	**Vendor**	Provide an executive summary of the project. Attach separate document if necessary.
30	Detailed Scope of Work:	**Vendor**	Attach a separate, detailed Scope of Work for the entire project. Please see Appendix ___ for details as to required documentation. Include an itemized list of subcontractor/vendor deliverables.
31	Funding Source:	**Vendor**	Itemize the source of all funds (including external to the CCSF) for this project.
32	Project Costs:	**Vendor**	Attach a separate document itemizing all costs associated with this project. Include all subcontractor/vendor rates and payment schedules.
33	Subtotal of Following Pages:	**Vendor**	The subtotaled dollar amount of any pages other than page one.
34	Quote Subtotal:	**Vendor**	Enter the total dollar amount of all pages.
35	Grand Total of Quote:	**Vendor**	Final order amount by combining the “Quote Subtotal” and the “Sales Tax”.
36	Calculate 1.9%Fee:	**Vendor**	Administrative Fee of 1.9%.

Technology Store
Quote Approval Form 3 for Professional Services Ordering

To be inserted

APPENDIX F

INSERT COPY OF MASTER STORE CONTRACT