



OPERATIONAL SERVICES DIVISION

Customizing CLM Templates

Instructional Guide



Objectives

Today You will Learn

- What templates are and how they work in CLM
- How to customize templates to fit Department needs
- How to map Word bookmarks to CLM fields
- How to deploy a newly customized template so that it replaces the global version

What Are Templates?



Template: A preset format for a document or file, used so that the format does not have to be recreated each time it is used

 **Time-saving!**

CLM Templates

The Working Document at each CLM phase is a Template.

Data entered into CLM fields injects into the Template to create a procurement document.

Usually, further editing is necessary before a document is ready for distribution.

Working Document

Document: [BIDPKG1704585 \(Template\)](#) [View PDF](#) [Upload Document](#)

Data Injection: ☒ YES

Sourcing Strategy Details

Document Number: CTR100

Title: Catering and Banquet Services for the Agency Department

Agency: Operational Services Division 1080

Business Unit: OSD07 - OSD TRAINING OSD07

Bid Package Details

COMMBUYS ID: [BD-23-1080-OSD07-OSD07-79038](#)

Predecessor Bid Package:

Title: Catering services Procurement

Description / Scope: Catering and Food Delivery Services for the Training Unit of the Department

Type: Request for Response

Agency: Operational Services Division 1080

Business Unit: OSD TRAINING OSD07

Contract Type: Select Option

Estimated Amount: 300,000.00

SWC #:

Notice Type: ☐ Goods & Services ☐ Construction ☐ HHS/POS

RFR Document

Working Document

Document: [BIDPKG1704585 \(Template\)](#) [View PDF](#) [Upload Document](#)

Data Injection: ☒ YES

Comments:

Document Collaboration

Not Started [EDIT](#) [SHARE](#)

MM - DD - YYYY Comments:

☒ YES

| User | Name | Email | Permission | Status |
|------|------|-------|---------------|-------------|
| | | | Select Option | Not Started |

[Add Row](#) [Remove Row](#)





Available Pre-Award Templates

| CLM Record Type | Associated Template (Working Document) |
|-----------------|---|
| STRTGY | Sourcing Strategy Template |
| BIDPKG | RFI (Request for Information) |
| BIDPKG | Due Diligence |
| BIDPKG | Intent to Procure |
| BIDPKG | Request for Response |

Who can customize templates?



It would be cool to change a template to fit my department's needs, reduce editing time, and be more efficient!

- ☒ COMMBUYS Basic Purchaser
- ☒ CLM Access
- ☒ Document Manager
- ☒ Advanced Microsoft Word user



Step 1: Call the OSD Help Desk



OSD Help Desk
1-888-627-8283
or
617-720-3197
8am - 5pm ET
Monday – Friday

Template for all



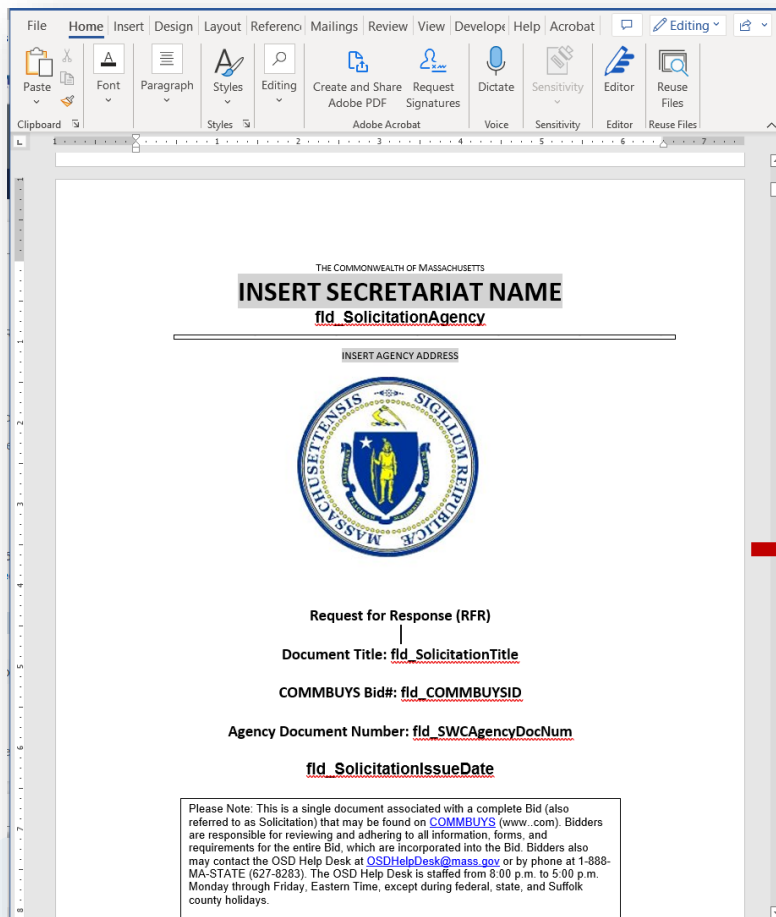
Template for your
department





TIPS: Two Programs


Template editing occurs in
Microsoft Word



THE COMMONWEALTH OF MASSACHUSETTS

INSERT SECRETARIAT NAME
fld_SolicitationAgency

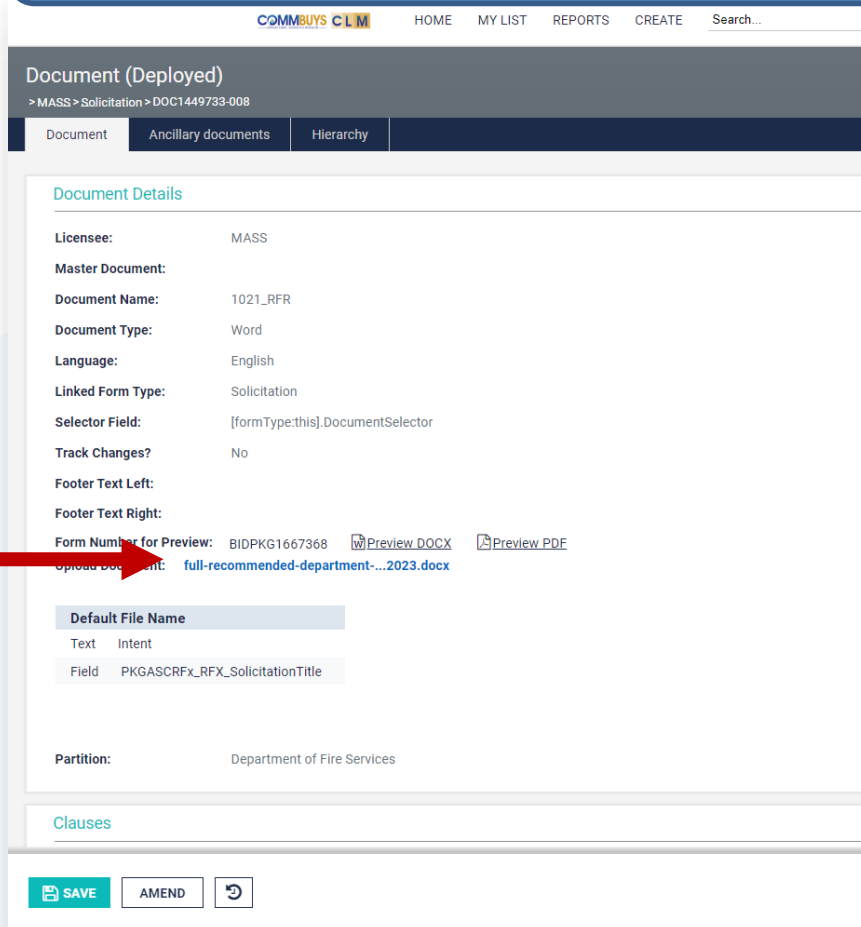
INSERT AGENCY ADDRESS



Request for Response (RFR)
Document Title: fld_SolicitationTitle
COMMBUYS Bid#: fld_COMMBUYSID
Agency Document Number: fld_SWCAgencyDocNum
fld_SolicitationIssueDate

Please Note: This is a single document associated with a complete Bid (also referred to as Solicitation) that may be found on [COMMBUYS \(www.com\)](http://COMMBUYS.com). Bidders are responsible for reviewing and adhering to all information, forms, and requirements for the entire Bid, which are incorporated into the Bid. Bidders also may contact the OSD Help Desk at OSDHelpDesk@mass.gov or by phone at 1-888-MA-STATE (627-8283). The OSD Help Desk is staffed from 9:00 p.m. to 5:00 p.m. Monday through Friday, Eastern Time, except during federal, state, and Suffolk county holidays.

Amended template is uploaded into CLM



COMMBUYS CLM HOME MY LIST REPORTS CREATE Search...

Document (Deployed)
> MASS > Solicitation > DOC1449733-008

Document Ancillary documents Hierarchy

Document Details

Licensee: MASS

Master Document:

Document Name: 1021_RFR

Document Type: Word

Language: English

Linked Form Type: Solicitation

Selector Field: [formType:this].DocumentSelector

Track Changes? No

Footer Text Left:

Footer Text Right:

Form Number for Preview: BIDPKG1667368 [Preview DOCX](#) [Preview PDF](#)

Upload Document: [full-recommended-department-...2023.docx](#)

Default File Name

Text Intent

Field PKGASCRFX_RFX_SolicitationTitle

Partition: Department of Fire Services

Clauses

[SAVE](#) [AMEND](#) [Refresh](#)



TIPS: Bookmarks and Fields


Templates include placeholders.
Word calls these “Bookmarks”

CLM has fields.

- CLM has Fields.
- Fields have labels.
- During Bid Package creation, data entered into fields inject into the bookmarked places in the Working Document (template).


Single Sign On to CLM

Sign In


OPERATIONAL SERVICES DIVISION

Login ID:

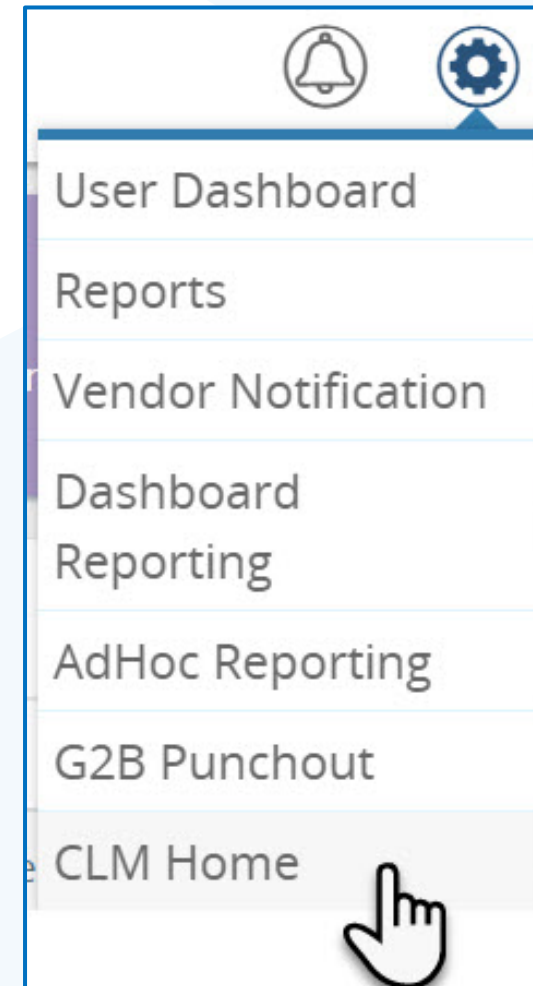
Password:

Login Assistance 

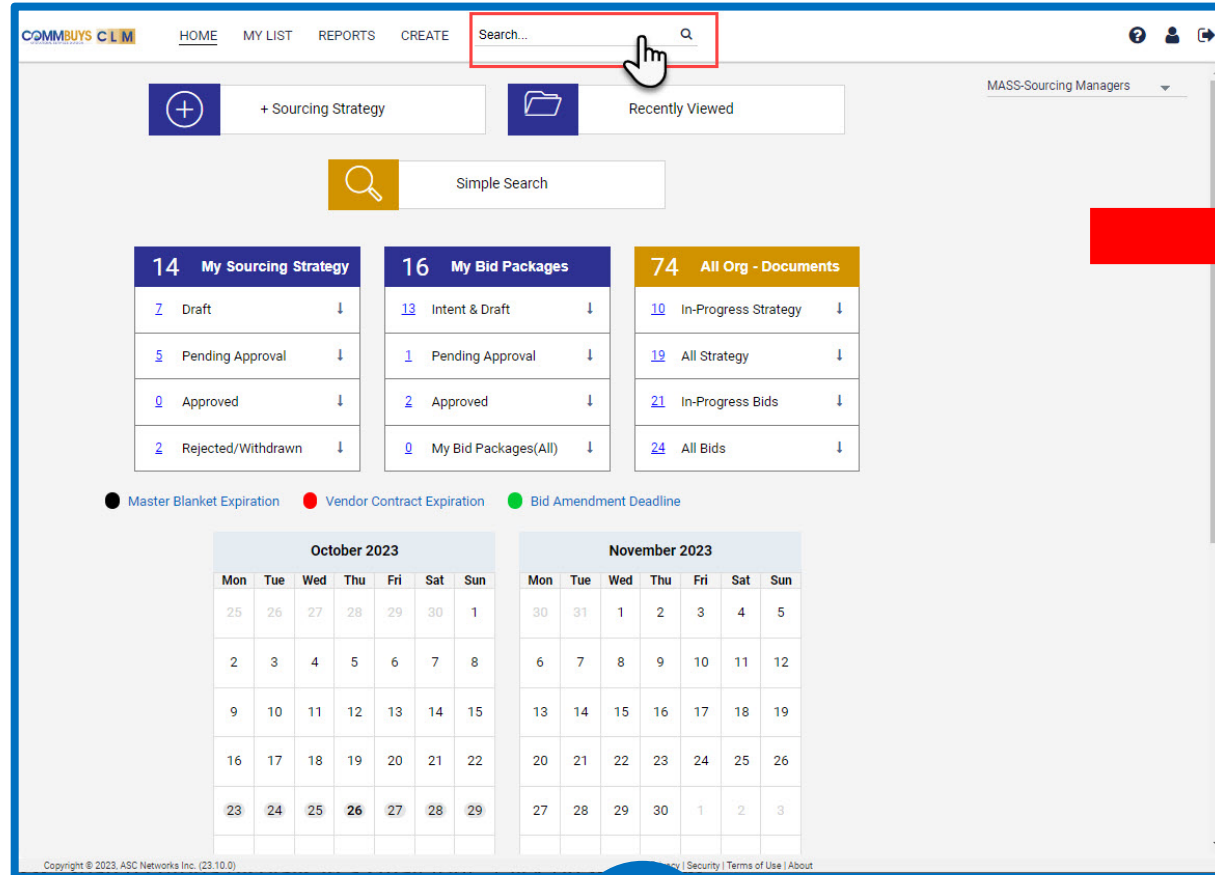
[Forgot User ID](#)
[Forgot Password](#)
[Sign in with SSO](#)

Sign In

S2G line of platform products.



CLM Home Page – Select Search



COMMBUYS CLM

HOME MY LIST REPORTS CREATE Search...

+ Sourcing Strategy Recently Viewed

Simple Search

14 My Sourcing Strategy

- 7 Draft
- 5 Pending Approval
- 0 Approved
- 2 Rejected/Withdrawn

16 My Bid Packages

- 13 Intent & Draft
- 1 Pending Approval
- 2 Approved
- 0 My Bid Packages(All)

74 All Org - Documents

- 10 In-Progress Strategy
- 19 All Strategy
- 21 In-Progress Bids
- 24 All Bids

● Master Blanket Expiration ● Vendor Contract Expiration ● Bid Amendment Deadline

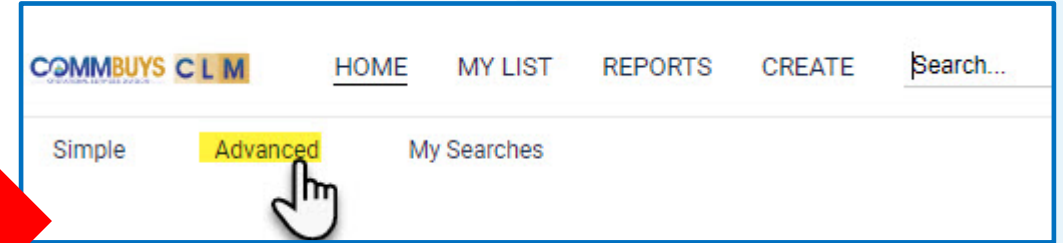
October 2023

| Mon | Tue | Wed | Thu | Fri | Sat | Sun |
|-----|-----|-----|-----|-----|-----|-----|
| 25 | 26 | 27 | 28 | 29 | 30 | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |

November 2023

| Mon | Tue | Wed | Thu | Fri | Sat | Sun |
|-----|-----|-----|-----|-----|-----|-----|
| 30 | 31 | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 1 | 2 | 3 |

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COMMBUYS CLM

HOME MY LIST REPORTS CREATE Search...

Simple **Advanced** My Searches

2

1

Advanced Search Selection

COMMbuys C L M HOME MY LIST REPORTS CREATE

Advanced Search

Search In

Form Document Active

Match ☒ All ☐ Any

| Field | Condition | Value |
|-------------|-----------|-------|
| Form Number | is | % |
| | is | |

+ Add Row - Remove Row

SEARCH SAVE REPORT CLEAR

Select a form or form group, enter search criteria and press the Search button

% =
wildcard

1. Under **Search In** select **Form** and **Document** from the drop-down menu.
2. Under **Field** select **Form Number**.
3. Set the **Condition** to **is**.
4. When the form number is unknown, type the Wildcard (%) into the **Value** field
5. Click the **Search** button.

Search Results

1. Find the RFR document assigned to your agency.
2. Click the Form Number hyperlink.



| | | | | |
|--------------------------------|----|----------|--|----------|
| DOC1449733-008 | 21 | Document | MASS - Solicitation - 1021_RFR | Deployed |
| DOC1449733-007 | 5 | Document | MASS - Solicitation - 1025_RFR | Deployed |
| DOC1449733-006 | 9 | Document | MASS - Solicitation - 1080_RFI | Deployed |
| DOC1449733-005 | 2 | Document | MASS - Solicitation - Default | Deployed |
| DOC1449733-004 | 12 | Document | MASS - Solicitation - 1080_DDP | Deployed |
| DOC1449733-003 | 13 | Document | MASS - Solicitation - 1080_ParticipatingAddendum | Deployed |
| DOC1449733-002 | 31 | Document | MASS - Solicitation - 1080_Intent | Deployed |
| DOC1449733-001 | 45 | Document | MASS - Solicitation - 1080_RFR | Deployed |

Search Results

| Form ↑↓ | Revision | Signed | Form Type ↑↓ | Description ↑↓ | Status ↑↓ |
|--------------------------------|----------|--------|--------------|---|-----------|
| DOC1449954-010 | 11 | | Document | MASS - PackageDocument - DefaultDocument | Deployed |
| DOC1449954-009 | 10 | | Document | MASS - PackageDocument - 1080_ChangeofIdentityForm | Deployed |
| DOC1449954-008 | 9 | | Document | MASS - PackageDocument - 1080_SupplierDiversityPlansDPForm | Deployed |
| DOC1449954-007 | 8 | | Document | MASS - PackageDocument - 1080_ElectronicFundsTransferEFT | Deployed |
| DOC1449954-006 | 22 | | Document | MASS - PackageDocument - 1080_AuthorizedSignatoryListingCASL | Deployed |
| DOC1449954-005 | 62 | | Document | MASS - PackageDocument - 1080_WNine | Deployed |
| DOC1449954-004 | 8 | | Document | MASS - PackageDocument - 1080_CommonwealthTermsandConditionsforInformationTechnologyContracts | Deployed |
| DOC1449954-003 | 8 | | Document | MASS - PackageDocument - 1080_StandardContractFormInstructionsandContractorCertifications | Deployed |
| DOC1449954-002 | 13 | | Document | MASS - PackageDocument - 1080_StandardContractForm | Deployed |
| DOC1449954-001 | 8 | | Document | MASS - PackageDocument - 1080_PromptPayDiscount | Deployed |
| DOC1449905-001 | 7 | | Document | MASS - MasterBlanket - 1080 | Deployed |
| DOC1449814-005 | 14 | | Document | MASS - Contract - 1021_eSignature | Deployed |
| DOC1449814-004 | 4 | | Document | MASS - Contract - 1021_PaperSignatureContract | Deployed |
| DOC1449814-003 | 16 | | Document | MASS - Contract - 1002_eSignature | Deployed |

| | | | | | | |
|--------------------------------|----|----------|--|----------|----------|----------|
| DOC1449733-008 | 21 | Document | MASS - Solicitation - 1021_RFR | Deployed | Contract | Deployed |
| DOC1449733-007 | 5 | Document | MASS - Solicitation - 1025_RFR | Deployed | | Deployed |
| DOC1449733-006 | 9 | Document | MASS - Solicitation - 1080_RFI | Deployed | | Deployed |
| DOC1449733-005 | 2 | Document | MASS - Solicitation - Default | Deployed | | Deployed |
| DOC1449733-004 | 12 | Document | MASS - Solicitation - 1080_DDP | Deployed | | Deployed |
| DOC1449733-003 | 13 | Document | MASS - Solicitation - 1080_ParticipatingAddendum | Deployed | | Deployed |
| DOC1449733-002 | 31 | Document | MASS - Solicitation - 1080_Intent | Deployed | | Deployed |
| DOC1449733-001 | 45 | Document | MASS - Solicitation - 1080_RFR | Deployed | Addendum | Deployed |
| DOC1449733-002 | 31 | Document | MASS - Solicitation - 1080_Intent | Deployed | | Deployed |
| DOC1449733-001 | 45 | Document | MASS - Solicitation - 1080_RFR | Deployed | | Deployed |

Viewing 1 - 25 of 29

Document window

1

Document (Deployed)

> MASS > Solicitation > DOC1449733-008

Revision: 21

Document

Ancillary documents

Hierarchy

Document Details

▼

Licensee:

MASS

Master Document:

Document Name:

1021_RFR

Document Type:

Word

Language:

English

Linked Form Type:

Solicitation

Selector Field:

[formType:this].DocumentSelector

Track Changes?

No

Footer Text Left:

Footer Text Right:

Form Number for Preview:

BIDPKG1667368

Preview DOCX

Preview PDF

Upload Document:

full-recommended-department-...2023.docx

Default File Name

Text

Intent

Field

PKGASCRFx_RFX_SolicitationTitle

Partition:

Department of Fire Services

Clauses

▼

Document Tag

Clause

Inclusion Control field

SAVE

AMEND

↺

3

Document (Amending)

> MASS > Solicitation > DOC1449733-008

Revision: 22

Document

Ancillary documents

Hierarchy

Document Details

▼

Licensee:

MASS

Master Document:

Document Name:

1021_RFR

*

Document Type:

Word

*

Language:

English

*

Linked Form Type:

Solicitation

*

Selector Field:

Document Selector

[formType:this].DocumentSelector

Track Changes?

No

Footer Text Left:

Footer Text Right:

Form Number for Preview:

BIDPKG1667368

Preview DOCX

Preview PDF

Upload Document:

full-recommended-department-...2023.docx

Remove

Default File Name

Text

Intent

Field

Bid Package Title

+ Add Row

Remove Row

Partition:

Department of Fire Services

Clauses

▼

SAVE

DEPLOY

REVERT

↺

4



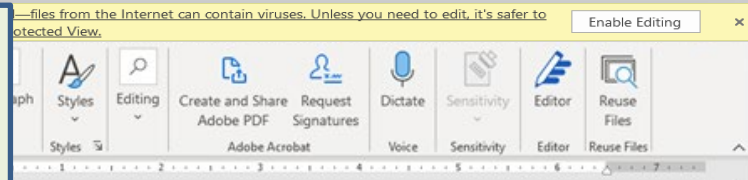
2



Amending in Word: Displaying Bookmarks

The template already includes many Bookmarks that are mapped to fields in CLM.


Be sure to click “Enable Editing”



THE COMMONWEALTH OF MASSACHUSETTS

INSERT SECRETARIAT NAME
fld_SolicitationAgency

INSERT AGENCY ADDRESS



Request for Response (RFR)
|
Document Title: fld_SolicitationTitle

COMMBUYS Bid#: fld_COMMBUYSID

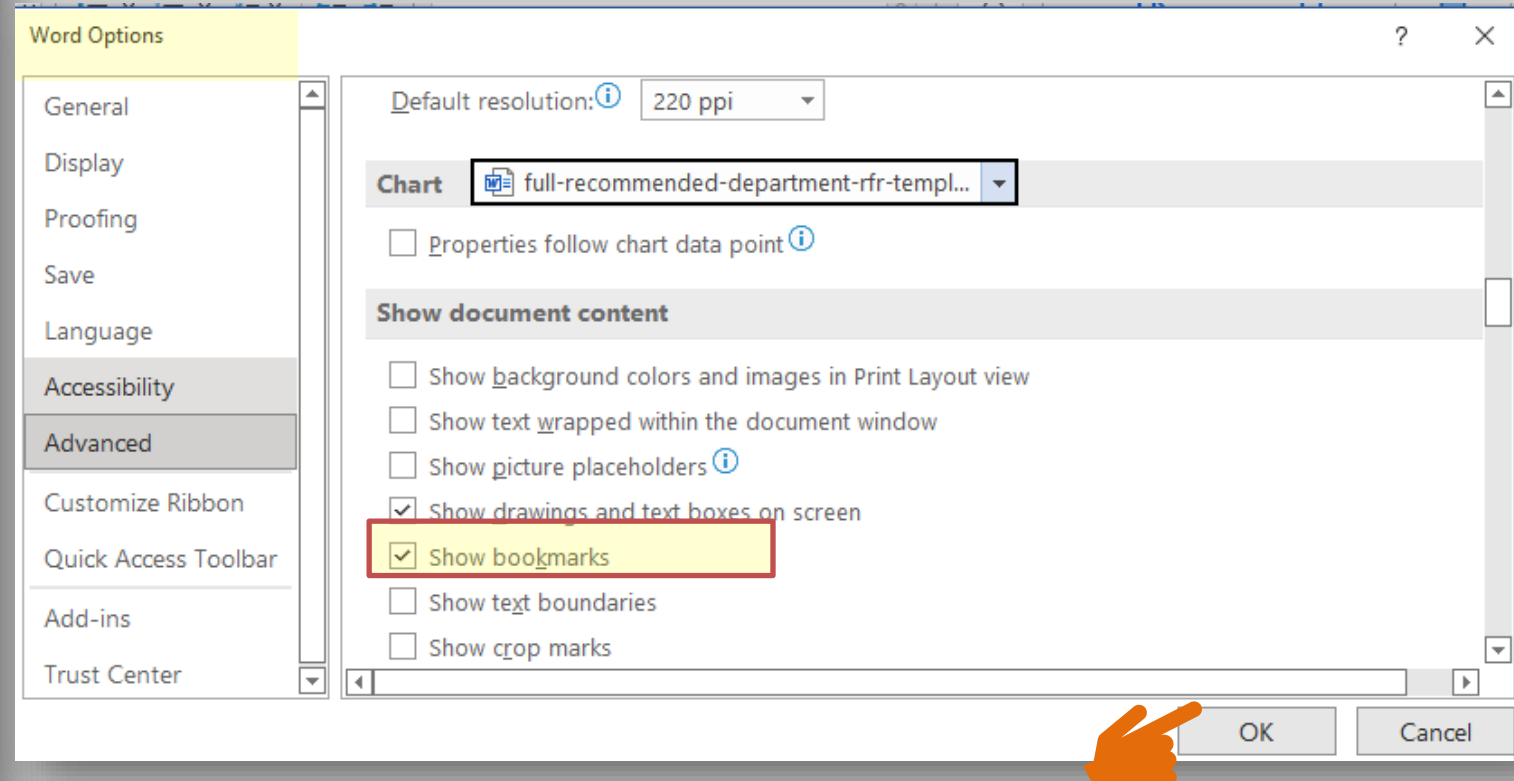
Agency Document Number: fld_SWCAgencyDocNum

fld_SolicitationIssueDate

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Make Bookmarks Visible:

1. Click **Enable Editing** at the top of the page.
2. Click the **File** menu, select **Options**, then select **Advanced**.
3. Scroll down to the section **Show document content**
4. Check the box to **Show Bookmarks**
5. Click **OK** at the bottom of the page.



Begin Editing the Document

INSTRUCTIONS FOR PURCHASERS:

This template document may be used to create Request for Response (RFR) documents for complex small ($\leq \$250,000$ in estimated annual value) and large ($> \$250,000$ in estimated annual value) procurements. It identifies the minimum contents required for an RFR as well as a wide range of suggested additional content.

Departments are responsible for reviewing and completing the RFR in compliance with OSD regulation, 801 CMR 21.00, and associated guidance and policies contained in OSD's [Conducting Best Value Procurements Handbook](#). For simple, small procurements, Departments may utilize the [Minimum Recommended Department RFR Template](#) available on the [OSD Forms](#) page.

Color coding explanation for purchasers:

This template uses color highlighting to identify the following:

- **Items required for all Bids** – shown in **red**. Highlighting should be removed before RFR publication.
- **Optional items** that may apply to some Bids – shown in **gray**, may be deleted. Highlighting should be removed before RFR publication if those items remain in the document.
- **Instructions** – shown in **yellow** should be deleted before RFR publication.

Please delete this instructions page and remove highlighting after document completion and before publication.

Note on document accessibility: This document uses highlighting, which may present accessibility challenges for some readers. If you are developing an RFR and require an accessible version of this document for editing, please email your request to osdlegal@state.ma.us.

Changes to your Departmental RFR Template may be simple or complex. This guide will demonstrate how to :

1. replace the logo;
2. add text that will always be in the new template;
3. add a placeholder bookmark where you would like data entered in CLM to inject into the document;
4. map Word Bookmarks to CLM fields.

Add a Custom Logo


To substitute the official Commonwealth seal with one for your agency:

1. Right click on the logo
2. Select **Change Picture** from the menu
3. Select the location of the logo file from the menu.

Click **SAVE** in Word to save that change.

THE COMMONWEALTH OF MASSACHUSETTS
INSERT SECRETARIAT NAME
fld_SolicitationAgency

INSERT AGENCY ADDRESS



Request for Response

Document Title: fld_Sol...

COMMBUYS Bid#: fld_CO...

Agency Document Number: fld_S...

fld_SolicitationIss...

Please Note: This is a single document associated with a solicitation (referred to as Solicitation) that may be found on the Commonwealth's website. Bidders are responsible for reviewing and adhering to all information and requirements for the entire Bid, which are incorporated by reference into this Request for Response. For more information, you may contact the OSD Help Desk at OSDHelpDesk@state.ma.us (627-8283). The OSD Help Desk is staffed Monday through Friday, Eastern Time, except during county holidays.

Table of Contents
ii

Document Sensitivity Level: High during development; Low once published.

OSD
OPERATIONAL SERVICES DIVISION



1 RFR INTRODUCTION AND GENERAL DESCRIPTION

1.1 Procurement Scope and Description

The Commonwealth of Massachusetts **<fld_SolicitationAgencyTwo>** is soliciting Bidders for the acquisition of **<fld_SolicitationDescriptionScope>**.

1.2 Background information

<If necessary, provide a background description, if and when an existing Contract will be ending, and the need for this procurement, etc.>

1.3 Applicable Procurement Law

This Bid is issued under the following law(s):

<Select one and delete all others>

- MGL c. 7, § 22; c. 30, § 51, § 52; and 801 CMR 21.00 (Goods and Services)
- MGL c. 7, § 22, § 22N; c. 30, § 51, § 52; 801 CMR 21.00; 808 CMR 1.00 (Human and Social Services)
- MGL c. 30, § 51, § 52 and § 65; c. 7, § 22; and 801 CMR 21.01(2) (b) (Legal Services)
- MGL c. 7A, § 7; St. 1986 c. 206, § 17; 815 CMR 2.00 (Grants)

1.4 Number of awards

<Describe the estimated number of Contract awards and any conditions/categories for having more or fewer awards. The sample language provides maximum flexibility. > The target maximum number of Contractors is <enter number>. This is a target number; the Strategic Sourcing Services Team (SSST) may award more or fewer Contracts if it is in the best interests of the Commonwealth to do so.

1.5 Adding Contractors after initial Contract award

<Describe how additional Contractors may be added. The sample language provides maximum flexibility. > If, over the life of the Contract, the SSST determines that additional Contractors should be added, these may first be drawn from qualified companies that responded to this Bid but were not awarded contracts. If necessary to meet the requirements of the Commonwealth, the Bid may be reopened to obtain additional Quotes.

1.6 Eligible Entities

<This template is designed for large Departmental Contracts only, and a template for Statewide Contracts should be requested from OSD after OSD's permission has been obtained to conduct a procurement of a Designated Statewide Contract. Select one of the following two options:>

<Option 1> **Limited User Contract – Restricted to Use by Defined Entities Only.** Any contract resulting from this Bid will be open for use by the Issuing Entity as well as the following other entities <Insert the list of eligible entities by name>.

<NOTE: If a Department issues a bid/contract that allows other named users, that Department accepts responsibility of contract management on behalf of those named users. Each named user is responsible for the execution of purchase orders, Statements of Work (SOW), or other engagement-specific documents and their retention, retrieval, archiving, and disposal; however, the named users may not execute separate contract documents.

|

RFR **<fld_SWCAgencyDocNumFootnote>** / COMMBUYS Bid# **<fld_COMMBUYSIDFootnote>**

Page 1

Document Sensitivity Level: High during development; Low once published.

Add or
remove
text

RFR INTRODUCTION AND GENERAL DESCRIPTION

1.1 Procurement Scope and Description

The Commonwealth of Massachusetts **<fld_SolicitationAgencyTwo>** is soliciting Bidders for the acquisition of **<fld_SolicitationDescriptionScope>**. Edit in any text that is always included in this section.

1.2 Background information

<If necessary, provide a background description, if and when an existing Contract will be ending, and the need for this procurement, etc.>

1.3 Applicable Procurement Law

This Bid is issued under the following law(s):

- MGL c. 7, § 22; c. 30, § 51, § 52; and 801 CMR 21.00 (Goods and Services)

1.4 Number of awards

<Describe the estimated number of Contract awards and any conditions/categories for having more or fewer awards. The sample language provides maximum flexibility. > The target maximum number of Contractors is <enter number>. This is a target number; the Strategic Sourcing Services Team (SSST) may award more or fewer Contracts if it is in the best interests of the Commonwealth to do so.

1.5 Adding Contractors after initial Contract award

<Describe how additional Contractors may be added. The sample language provides maximum flexibility. > If, over the life of the Contract, the SSST determines that additional Contractors should be added, these may first be drawn from qualified companies that responded to this Bid but were not awarded contracts. If necessary to meet the requirements of the Commonwealth, the Bid may be reopened to obtain additional Quotes.

1.6 Eligible Entities

Limited User Contract – Restricted to Use by Issuing Entity Only. Any contract resulting from this Bid will be open for use by the Issuing Entity Only.

1.7 Acquisition Method(s)

<Choose from the following selection of acquisition methods and delete the others.>The acquisition method(s) to acquire goods and/or services from this Bid are Outright Purchase, Tax Exempt Lease Purchase (TELP), Term Lease, Fee for Service, Rental (Not to exceed six months), License, and Other **[if using Other, describe the acquisition method]**.

1.8 Performance and Payment Timeframes Which Continue Beyond Duration of the Contract.

All term leases, rentals, maintenance, or other agreements for services **<entered into>** during the duration of this contract and whose performance and payment timeframes extend beyond the duration of this contract shall remain in effect for performance and payment purposes no longer than **X** months after final contract end date. No new leases, rentals, maintenance, or other agreements for services may be executed after the contract has expired. Any contract termination or suspension pursuant to this section shall not automatically terminate any leases, rentals, maintenance, or other agreements for services already in place unless the department also terminates said leases, rentals, maintenance, or other agreements for service, which were executed pursuant to the main contract.

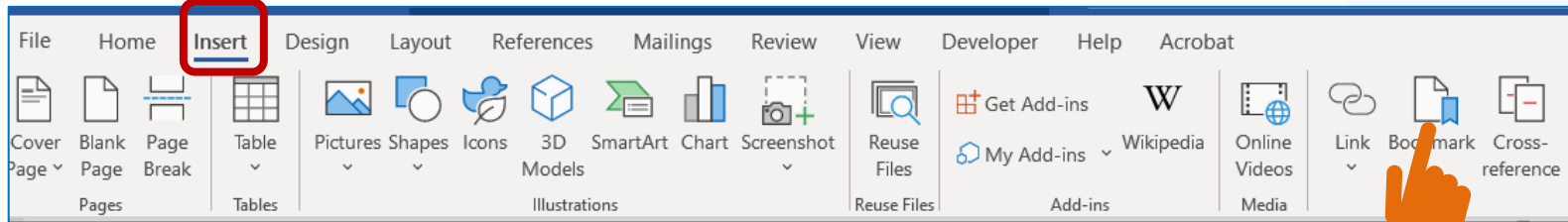
1.9 Contract Duration

RFR **<fld_SWCAgencyDocNumFootnote>** / COMMBUYS Bid# **<fld_COMMBUYSIDFootnote>**

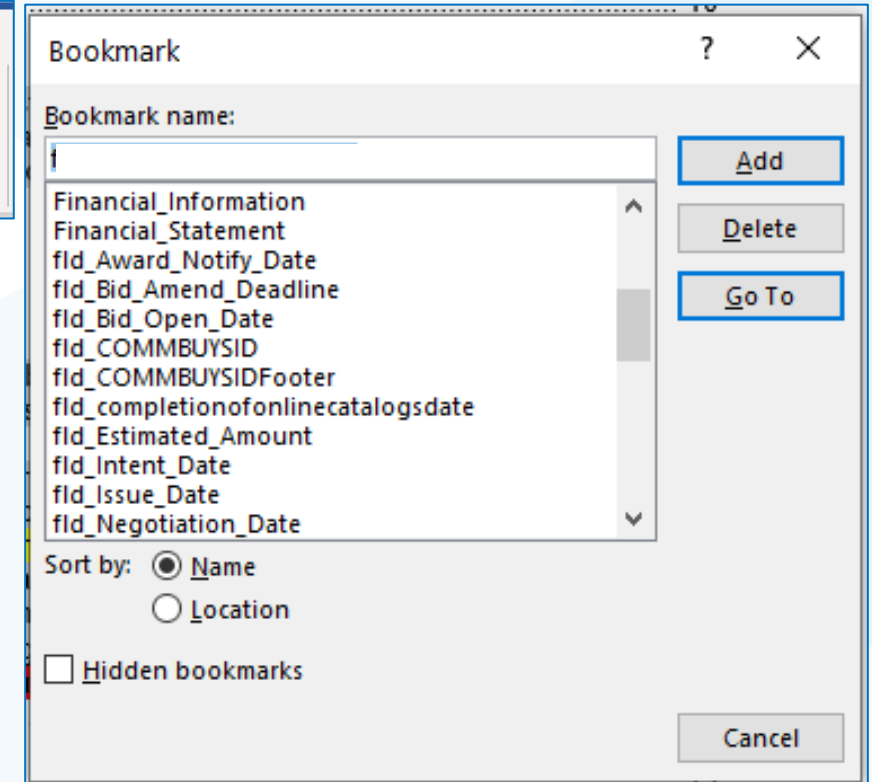
Page 1

Document Sensitivity Level: High during development; Low once published.

What bookmarks are already in the template?



1. Click the **Insert** tab on the Word Ribbon.
2. Click the **Bookmarks** icon.
3. Scroll to see all the bookmarks included in the template.
4. Highlight a **Bookmark Name** and click the **GoTo** Button to see where the bookmark leads.



NOTE: Only those bookmark beginning with **fld_** are placeholders/injection points for data from CLM. Other bookmarks may be labels for Section Titles or other information.

Adding Bookmarks... Easy as 1...2...3!

Scenario

A department wants the **Procurement Title** to appear in the Description area as well as on the Title Page.

1

Go to the spot in your document where you want to place a bookmark.

2

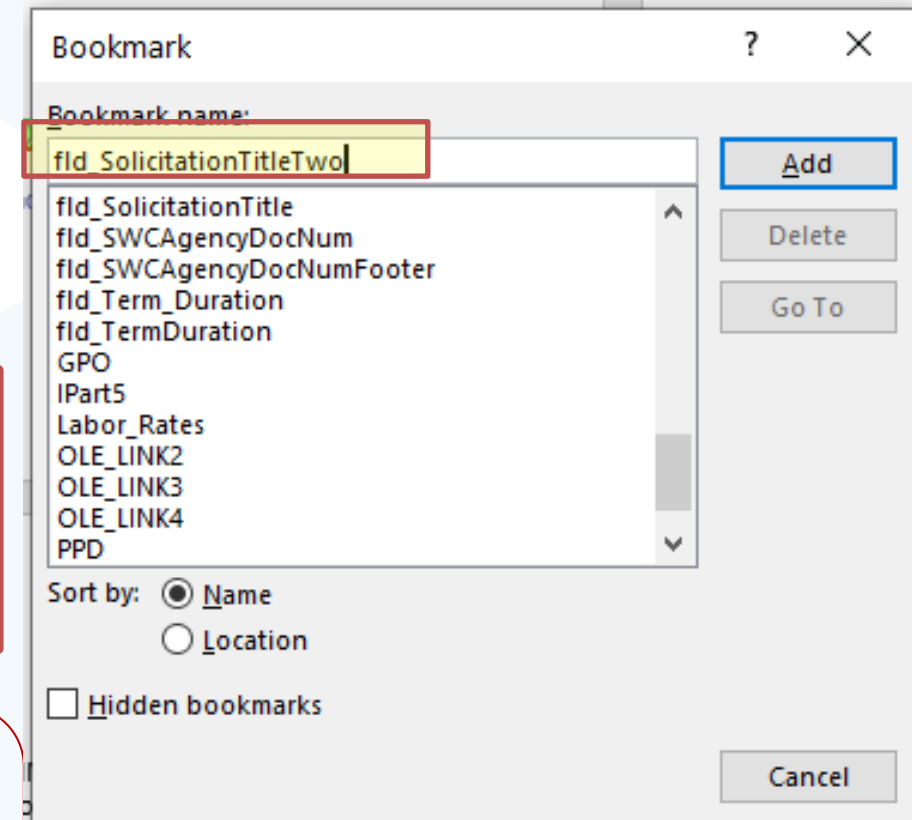
Type the name of the new bookmark, then highlight the text. **Click CNTRL+C**

3

Access the bookmarks (insert>bookmarks). Paste the text into the name box. Click **Add**.

NOTES:

- A bookmark may only point to 1 location in the document.
- Bookmark name that link to CLM fields must begin with **fld_**
- Bookmark names may not contain spaces, special characters, or numerals at the end.



How does that look in the document?

1

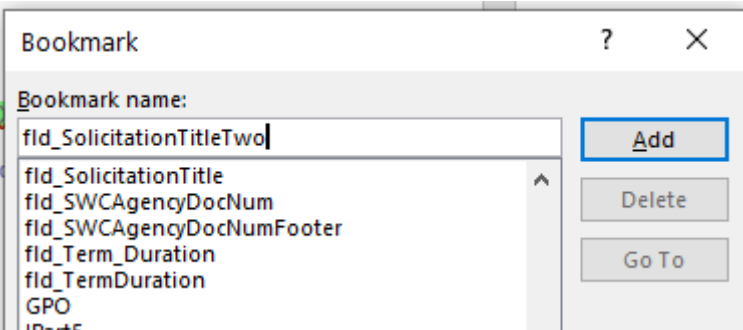
1 RFR INTRODUCTION AND GENERAL DESCRIPTION

1.1 Procurement Scope and Description

With this Request for Response fld_SolicitationTitleTwo, The Commonwealth of Massachusetts fld_SolicitationAgencyTwo is soliciting Bidders for the acquisition of fld_SolicitationDescriptionScope

Text for new Bookmark typed and highlighted . CNTRL+C to copy.

2



Bookmark name:
fld_SolicitationTitleTwo

fld_SolicitationTitle
fld_SWCAgencyDocNum
fld_SWCAgencyDocNumFooter
fld_Term_Duration
fld_TermDuration
GPO
ID-45

Add
Delete
Go To

Bookmark name pasted into the name box. Click Add.

3

1 RFR INTRODUCTION AND GENERAL DESCRIPTION

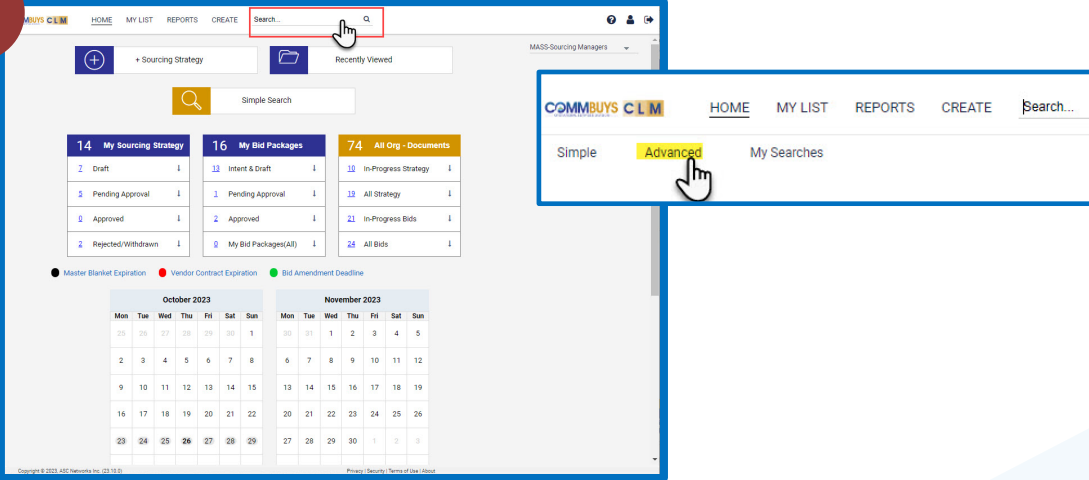
1.1 Procurement Scope and Description

With this Request for Response fld_SolicitationTitleTwo, The Commonwealth of Massachusetts fld_SolicitationAgencyTwo is soliciting Bidders for the acquisition of fld_SolicitationDescriptionScope

Brackets show that the text is now a Bookmark.

Uploading the Template to CLM

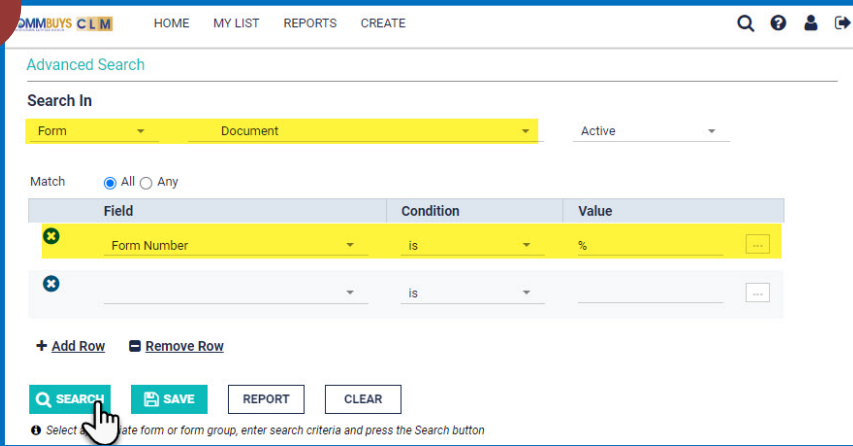
1



COMM-BUYS C.L.M. HOME MY LIST REPORTS CREATE Search...

Simple Advanced My Searches

2



COMM-BUYS C.L.M. HOME MY LIST REPORTS CREATE

Advanced Search

Search In
Form Document Active

Match ☒ All ☐ Any

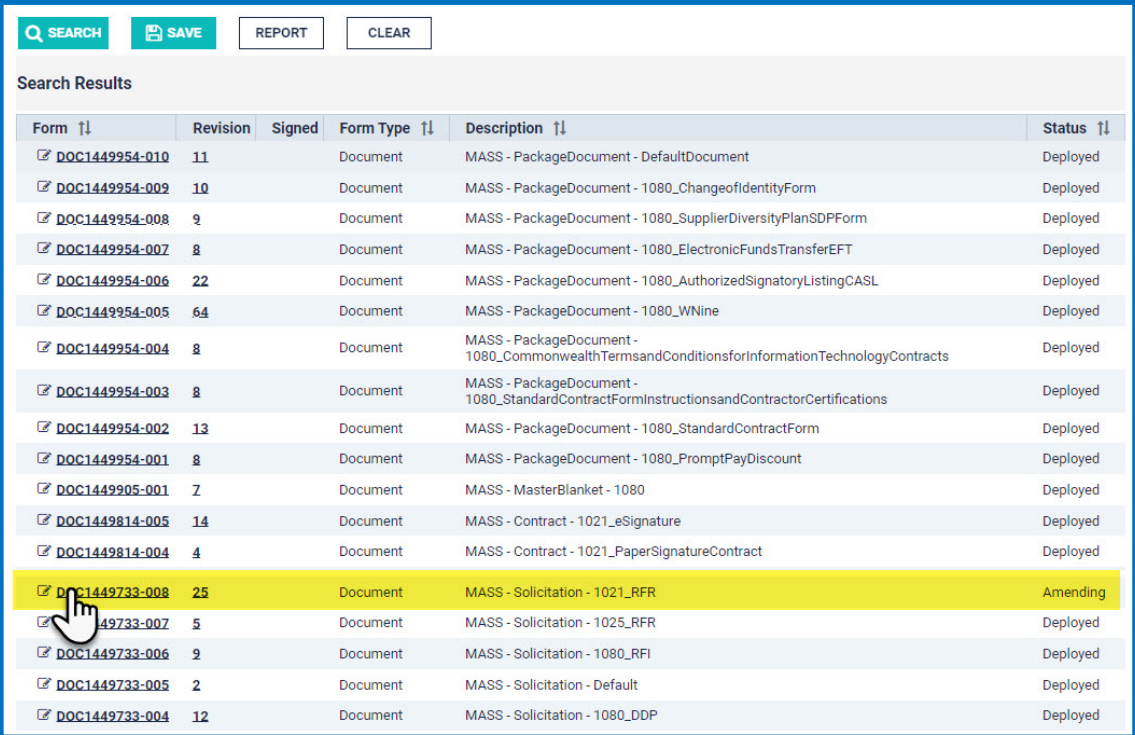
| Field | Condition | Value |
|-------------|-----------|-------|
| Form Number | is | % |
| | is | |

+ Add Row - Remove Row

SEARCH SAVE REPORT CLEAR

Select a form or form group, enter search criteria and press the Search button

3



SEARCH SAVE REPORT CLEAR

Search Results

| Form | Revision | Signed | Form Type | Description | Status |
|----------------|----------|--------|-----------|---|----------|
| DOC1449954-010 | 11 | | Document | MASS - PackageDocument - DefaultDocument | Deployed |
| DOC1449954-009 | 10 | | Document | MASS - PackageDocument - 1080_ChangeofIdentityForm | Deployed |
| DOC1449954-008 | 9 | | Document | MASS - PackageDocument - 1080_SupplierDiversityPlansDPForm | Deployed |
| DOC1449954-007 | 8 | | Document | MASS - PackageDocument - 1080_ElectronicFundsTransferEFT | Deployed |
| DOC1449954-006 | 22 | | Document | MASS - PackageDocument - 1080_AuthorizedSignatoryListingCASL | Deployed |
| DOC1449954-005 | 64 | | Document | MASS - PackageDocument - 1080_WNine | Deployed |
| DOC1449954-004 | 8 | | Document | MASS - PackageDocument - 1080_CommonwealthTermsandConditionsforInformationTechnologyContracts | Deployed |
| DOC1449954-003 | 8 | | Document | MASS - PackageDocument - 1080_StandardContractFormInstructionsandContractorCertifications | Deployed |
| DOC1449954-002 | 13 | | Document | MASS - PackageDocument - 1080_StandardContractForm | Deployed |
| DOC1449954-001 | 8 | | Document | MASS - PackageDocument - 1080_PromptPayDiscount | Deployed |
| DOC1449905-001 | 7 | | Document | MASS - MasterBlanket - 1080 | Deployed |
| DOC1449814-005 | 14 | | Document | MASS - Contract - 1021_eSignature | Deployed |
| DOC1449814-004 | 4 | | Document | MASS - Contract - 1021_PaperSignatureContract | Deployed |
| DOC1449733-008 | 25 | | Document | MASS - Solicitation - 1021_RFR | Amending |
| DOC1449733-007 | 5 | | Document | MASS - Solicitation - 1025_RFR | Deployed |
| DOC1449733-006 | 9 | | Document | MASS - Solicitation - 1080_RFI | Deployed |
| DOC1449733-005 | 2 | | Document | MASS - Solicitation - Default | Deployed |
| DOC1449733-004 | 12 | | Document | MASS - Solicitation - 1080_DDP | Deployed |

Uploading the Newly Edited Template

In the field labeled **Upload Document** is the current version which needs to be replaced.

1. Click the **green** icon to substitute the old document with the new one.
2. A document selection box displays. Select the newly edited document from the list and click **open**.
3. The new document title displays as the uploaded document.
4. Click **Save**. The document title now displays as a hyperlink.

Document (Amending) Revision: 25
> MASS > Solicitation > DOC1449733-008

Document Ancillary documents Hierarchy

Document Details

Licensee: MASS

Master Document:

Document Name: 1021_RFR *

Document Type: Word *

Language: English *

Linked Form Type: Solicitation *


Selector Field: Document Selector [formType:this].DocumentSelector

Track Changes? No





Footer Text Left:

Footer Text Right:

Form Number for Preview: BIDPKG1667368 [Preview DOCX](#) [Preview PDF](#)

Upload Document: [1021-department-rfr-template...2723.docx](#)  * ☐ Remove


Default File Name

| | | |
|---|-------|-------------------|
|   | Text | Intent |
|   | Field | Bid Package Title |

+ Add Row - Remove Row

Partition: Department of Fire Services

Clauses

 * ☐ Remove

Replace

SAVE DEPLOY REVERT

Mapping Word Bookmarks to CLM Fields



Variables

| | Document Tag | Field | Extract? |
|----|------------------------------|--|----------|
| 1 | SolicitationAgency | [formType:this] Agency [formType:this].Agency | No |
| 2 | SolicitationTitle | [formType:this] Bid Package Title [formType:this].PKGASCRFx_RFX_SolicitationTitle | No |
| 3 | COMMBUYSID | [formType:this] COMMBUYS ID [formType:this].COMMBUYSBid | No |
| 4 | SWCAgencyDocNum | [formType:this] SWC # [formType:this].SWC | No |
| 5 | SolicitationIssueDate | [formType:this] Issue Date [formType:this].PKGASCRFx_RFX_SolicitationIssueDate | No |
| 6 | SWCAgencyDocNumFooter | [formType:this] SWC # [formType:this].SWC | No |
| 7 | COMMBUYSIDFooter | [formType:this] COMMBUYS ID [formType:this].COMMBUYSBid | No |
| 8 | SolicitationTitleTwo | Select Option Select Option | No |
| 9 | SolicitationAgencyTwo | [formType:this] Agency [formType:this].Agency | No |
| 10 | SolicitationDescriptionScope | [formType:this] Bid Package Description / Scope [formType:this].PKGASCRFx_RFX_SolicitationDescriptionScope | No |
| 11 | TermDuration | [formType:this] Bid Package Description / Scope [formType:this].PKGASCRFx_RFX_SolicitationDescriptionScope | No |
| 12 | Term_Duration | Select Option Select Option | No |
| 13 | Estimated_Amount | Select Option Select Option | No |
| 14 | Renewal | Select Option Select Option | No |
| 15 | Intent_Date | Select Option Select Option | No |
| 16 | Issue_Date | Select Option Select Option | No |
| 17 | PreBid_Date | Select Option Select Option | No |
| 18 | Question_Accept_Date | Select Option Select Option | No |



Mapping Word Bookmarks to CLM Fields – *cont'd 1*



Variables

| | Document Tag | Field | Field | Extract? |
|----|------------------------------|------------------------------------|---------------------------------|----------|
| 1 | SolicitationAgency | [formType:this] | Agency | No |
| 2 | SolicitationTitle | [formType:this] | Bid Package Title | No |
| 3 | COMMBUYSID | [formType:this] | COMMBUYS ID | No |
| 4 | SWCAgencyDocNum | [formType:this] | SWC # | No |
| 5 | SolicitationIssueDate | [formType:this] | Issue Date | No |
| 6 | SWCAgencyDocNumFooter | [formType:this] | SWC # | No |
| 7 | COMMBUYSIDFooter | [formType:this] | COMMBUYS ID | No |
| 8 | SolicitationTitleTwo | Select Option | Select Option | No |
| 9 | SolicitationAgencyTwo | Select Option | Agency | No |
| 10 | SolicitationDescriptionScope | AgencyHead | Bid Package Description / Scope | No |
| 11 | TermDuration | CCPO | Bid Package Description / Scope | No |
| 12 | Term_Duration | Legal | Select Option | No |
| 13 | Estimated_Amount | PKGASCRFx_Solicitation_Approver | Select Option | No |
| 14 | Renewal | PKGASCRFx_Solicitation_Creator | Select Option | No |
| 15 | Intent_Date | PKGASCRFx_Solicitation_Parent | Select Option | No |
| 16 | Issue_Date | PKGASCRFx_Solicitation_Procurement | Select Option | No |
| 17 | PreBid_Date | PKGASCRFx_Solicitation_Revisor | Select Option | No |
| 18 | Question_Accept_Date | SourcingManager | Select Option | No |

- Select Option
- ACPO
- AgencyHead
- CCPO
- Legal
- PKGASCRFx_Solicitation_Approver
- PKGASCRFx_Solicitation_Creator
- PKGASCRFx_Solicitation_Parent
- PKGASCRFx_Solicitation_Procurement
- PKGASCRFx_Solicitation_Revisor
- SourcingManager
- Solicitation
- [formType:this]



Mapping Word Bookmarks to CLM Fields – *cont'd 2*

Variables























| | Document Tag | Field | | |
|---|-----------------------|-----------------|-------------------|---|
| 1 | SolicitationAgency | [formType:this] | Agency | [formType:this].Agency |
| 2 | SolicitationTitle | [formType:this] | Bid Package Title | [formType:this].PKGASCRFx_RFX_SolicitationTitle |
| 3 | COMMBUYSID | [formType:this] | COMMBUYS ID | [formType:this].COMMBUYSBid |
| 4 | SWCAgencyDocNum | [formType:this] | SWC # | [formType:this].SWC |
| 5 | SolicitationIssueDate | [formType:this] | Issue Date | [formType:this].PKGASCRFx_RFX_SolicitationIssueDate |
| 6 | SWCAgencyDocNumFooter | [formType:this] | SWC # | [formType:this].SWC |
| 7 | COMMBUYSIDFooter | [formType:this] | COMMBUYS ID | [formType:this].COMMBUYSBid |
| 8 | SolicitationTitleTwo | [formType:this] | Select Option | |

In the scenario, bookmarks [fld_SolicitationTitle] and [fld_SolicitationTitleTwo] were place holders for the same CLM data: **Bid Package Title**

- Select Option
- Announcement or Awarded Bidder(s)
- Approval Method
- Approver Due Date
- Approver Name
- Approver Notes
- Approver Row ID
- Approver Status
- Approver User Form
- Approver User Title
- Average
- Bid Amendment Deadline
- Bid Package Description / Scope
- Bid Package Title**
- Bid Package Type
- Business Unit
- Business Unit Code
- CCPO Approval
- CCPO Approver
- CCPO Due Date
- CCPO Notes



Mapping Word Bookmarks to CLM Fields – *last*

| | Document Tag | Field | | |
|----|--|-----------------|-------------------------------------|--|
| 1 |  SolicitationAgency | [formType:this] | Agency | [formType:this].Agency |
| 2 |  SolicitationTitle | [formType:this] | Bid Package Title | [formType:this].PKGASCRFx_RFX_SolicitationTitle |
| 3 |  COMMBUYSID | [formType:this] | COMMBUYS ID | [formType:this].COMMBUYSBid |
| 4 |  SWCAgencyDocNum | [formType:this] | SWC # | [formType:this].SWC |
| 5 |  SolicitationIssueDate | [formType:this] | Issue Date | [formType:this].PKGASCRFx_RFX_SolicitationIssueDate |
| 6 |  SWCAgencyDocNumFooter | [formType:this] | SWC # | [formType:this].SWC |
| 7 |  COMMBUYSIDFooter | [formType:this] | COMMBUYS ID | [formType:this].COMMBUYSBid |
| 8 |  SolicitationTitleTwo | [formType:this] | Bid Package Title | [formType:this].PKGASCRFx_RFX_SolicitationTitle |
| 9 |  SolicitationAgencyTwo | [formType:this] | Agency | [formType:this].Agency |
| 10 |  SolicitationDescriptionScope | [formType:this] | Bid Package Description / Scope | [formType:this].PKGASCRFx_RFX_SolicitationDescriptionScope |
| 11 |  TermDuration | [formType:this] | Bid Package Description / Scope | [formType:this].PKGASCRFx_RFX_SolicitationDescriptionScope |
| 12 |  Term_Duration | [formType:this] | Term Duration | [formType:this].PKGASCRFx_RFX_TermDuration |
| 13 |  Estimated_Amount | [formType:this] | Estimated Amount | [formType:this].PKGASCRFx_RFX_EstimatedAmount |
| 14 |  Renewal | [formType:this] | Renewal | [formType:this].PKGASCRFx_RFX_Renewal |
| 15 |  Intent_Date | [formType:this] | Intent to Procure Date | [formType:this].IntenttoProcureDate |
| 16 |  Issue_Date | [formType:this] | Issue Date | [formType:this].PKGASCRFx_RFX_SolicitationIssueDate |
| 17 |  PreBid_Date | [formType:this] | Pre-Bid Conference Date | [formType:this].PreBidConferenceDate |
| 18 |  Question_Accept_Date | [formType:this] | Questions Acceptance Deadline | [formType:this].PKGASCRFx_RFX_SolicitationQuestionsDueDate |
| 19 |  QA_Answer_Date | [formType:this] | Questions Answered Date | [formType:this].QuestionsAnsweredDate |
| 20 |  Bid_Amend_Deadline | [formType:this] | Bid Amendment Deadline | [formType:this].BidAmendmentDeadlineDate |
| 21 |  Bid_Open_Date | [formType:this] | Presentation for Selected Bidder(s) | [formType:this].PresentationforSelectedBiddersDate |
| 22 |  Presentation_Date | [formType:this] | Closing Date | [formType:this].PKGASCRFx_RFX_SolicitationDueDate |



BEST PRACTICE

All Document Tags (Word Bookmarks) are linked to CLM fields.

The first four columns are complete for each item.



Deploy the Template

Click the **DEPLOY** button

Document status changes to Deployed.

All newly created Bid Packages will employ this new RFR Template.

Whenever additional customizations are needed, come back to the document screen, click AMEND, and start again



Each Agency gets just one customized RFR template



SAVE DEPLOY REVERT ↺

Document (Deployed) Revision: 29
> MASS > Solicitation > DOC1449733-008

Document Ancillary documents Hierarchy

Document Details

Licensee: MASS
Master Document:
Document Name: 1021_RFR
Document Type: Word
Language: English
Linked Form Type: Solicitation
Selector Field: [formType:this].DocumentSelector
Track Changes? No
Footer Text Left:
Footer Text Right:
Form Number for Preview: BIDPKG1667368 [Preview DOCX](#) [Preview PDF](#)
Upload Document: 1021-department-rfr-template... (1).docx

Default File Name
Text Intent
Field PKGASCRFx_RFX_SolicitationTitle

Partition: Department of Fire Services

Clauses

Document Tag¹ Clause¹ Inclusion Control field

Variables

SAVE AMEND ↺



New Bid Packages

The Working Document employs the customized template (highlighted).

Data entered into Bid Package Details and other Bid Package Sections injects into the RFR template upon download.

The downloaded document should be further refined to reflect the needs of the specific procurement.

Bid Package (Draft)
BIDPKG1704586

IntentDraftApproval

Revision: 3

Bid PackagesPackage Documents

Sourcing Strategy Details

Bid Package Details

COMMBUYS ID:BD-23-1021-DFS-DFS02-79039

Predecessor Bid Package:

Title:Catering Services Procurement

Description / Scope:catering services for two Stowe locations. Estimated number of events is about ten per year of the contract

Type:Request for Response

Agency:Department of Fire Services - 1021

Business Unit:Finance - DFS

Contract Type:Blanket Purchase Agreement

Estimated Amount:30,000.00

SWC #:

Notice Type:☒ Goods & Services ☐ Construction ☐ HHS/POS

Goods and Services Details

Purchase Type:Term

Term Type:☐ Dates ☒ Duration

Term Duration:3 years

Bid Package Dates

RFR Document

Working Document

Document: **BIDPKG1704586 (Template)** View PDF Upload Document

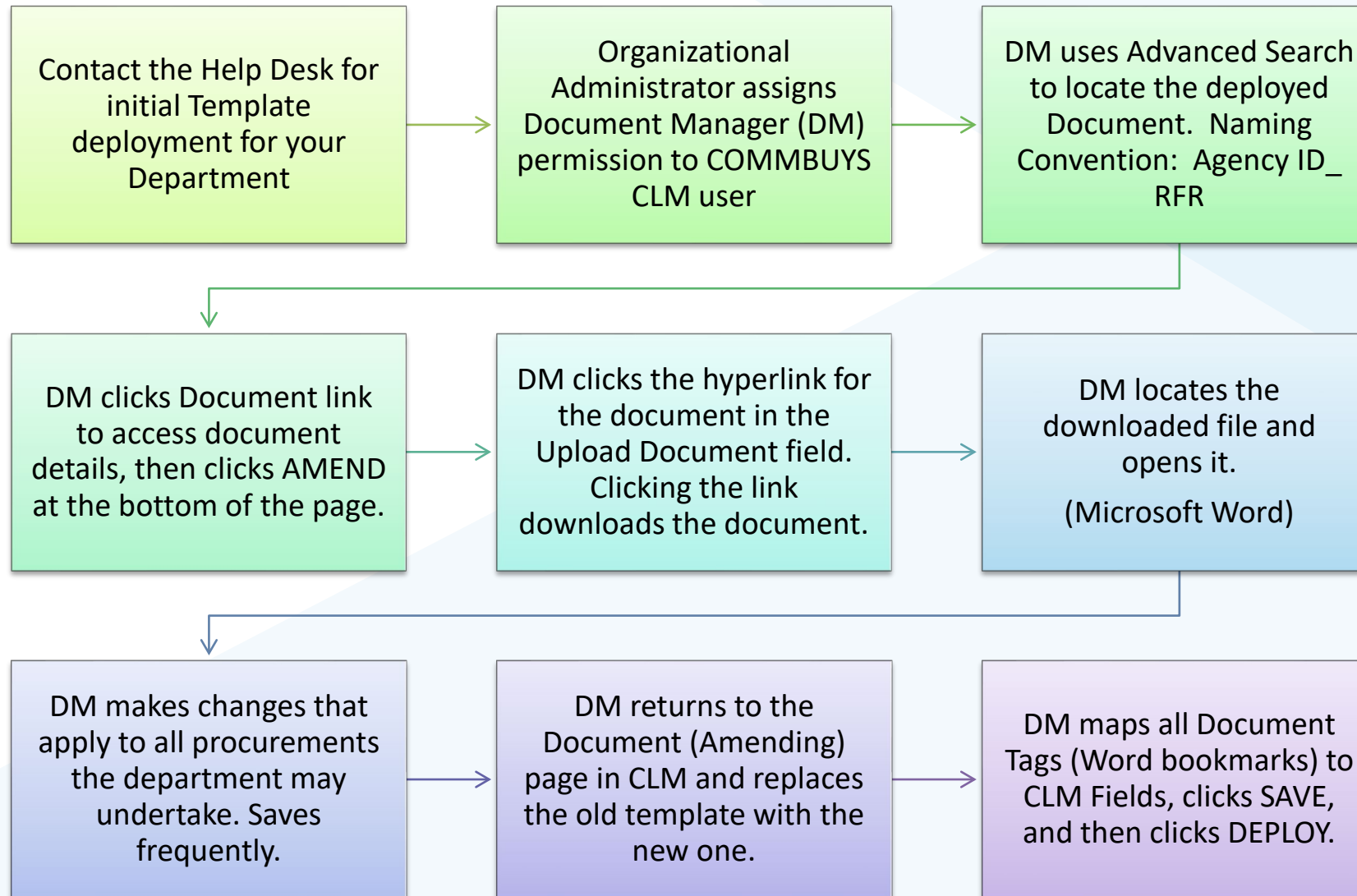
Data Injection: YES

Comments:

Working Document Collaboration

Status: Not Started EDIT SHARE

Basic Workflow for Customizing the RFR Template





Resources and Contact Information

Operational Services Division

- Phone: 617-720-3300
- Website: www.mass.gov/osd

Resources

- [Best Value Procurement Handbook](#)
- [COMMBUYS CLM Resource page](#)
- [How to Use Templates in COMMBUYS CLM \(Video Demo\)](#)

OSD Helpdesk

- Phone: 617-720-3197
- Toll-free: 888-627-8283
- Email: OSDHelpDesk@mass.gov
- Website: www.commbuys.com