

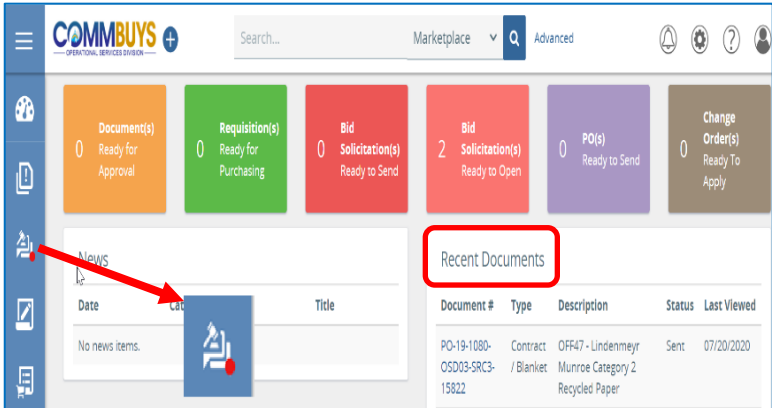

Job Aid: How to Add Bidder Notification to a Bid Posting

This Job Aid shows how to:

- Add bidder notification to a bid
- Generate an email notification to selected bidders in COMMBUYS

Of Special Note:

COMMBUYS has functionality that enables the buyer to select all vendors who have registered in COMMBUYS and who have designated United Nations Standard Products and Services Codes (UNSPSC) for their vendor profile. If you have already issued a bid and did not select vendors to notify of the bid opportunity or need to add additional vendors to notify, please utilize this job aid. Email notification of bid opportunities in COMMBUYS now requires the buyer to indicate the vendors/bidders who will receive an email bid notification. This step is taken on the Bidders screen of the bid.

Screenshot	Directions
	<p>Step 1: Clicking the Bid Solicitations Icon</p> <p>After logging in, click on the Bid Solicitation icon found on the left panel of your homepage, or select the desired bid from the Recent Documents box by clicking on the blue hyperlink in the Document # column.</p> <p>NOTE: If found in the Recent Documents box, skip to Step 4.</p>
	<p>Step 2: Clicking the Tab Hyperlink</p> <p>The Bid Solicitations page displays. To send notification, the bid can be in the following statuses:</p> <ul style="list-style-type: none"> • In Progress • Ready for Approval • Ready to Send • Sent (even after the bid has been posted, bidders can be added and notified by following the next steps) <p>Click on the desired tab.</p>

In Progress Ready for Approval Returned Ready to Send **Sent** Ready to Open Opened Evaluated Approved Gone to PO

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Bid Solicitation #	Description	Bid Type Code	Buyer	Dep / Loc	Bid Opening Date	Bid Holder
BD-21-1990-BIDS1-BIDS1-52106	water safety program_test	NS	Bill O'Malley15	BIDS1/BIDS1	07/16/2020 12:30:00	List
BD-21-1990-BIDS1-BIDS1-52105	test export	NS	Bill O'Malley15	BIDS1/BIDS1	07/16/2020 11:30:00	List

1-2 of 2 << 1 >>

Step 3: Clicking the Bid Solicitation # Hyperlink

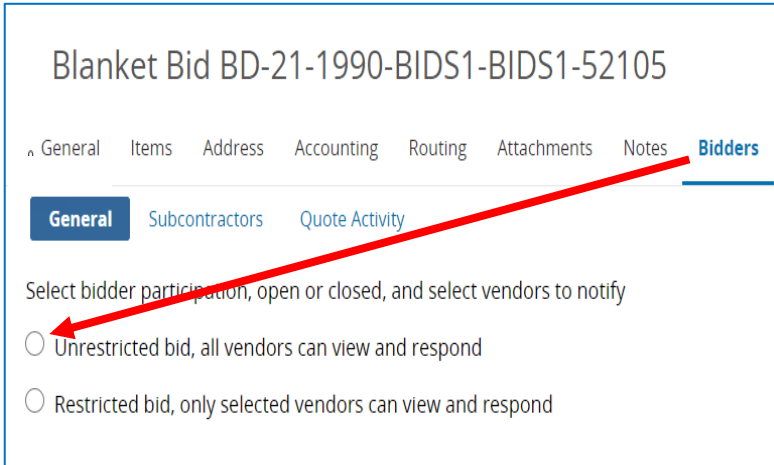
Click on the blue hyperlink for the desired bid in the **Bid Solicitation #** column.

Blanket Bid BD-21-1990-BIDS1-BIDS1-52105

General Items Address Accounting Routing Attachments Notes **Bidders** Questions Amendments(1) Q&A Reminders Summary

Step 4: Clicking the Bidders Tab

The Summary tab of the Bid displays. Click on the **Bidders** tab.

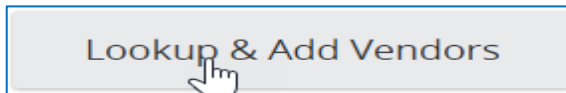


Step 5: Looking up Vendors

In this example, the bid is in Sent status and has been posted in COMMBUYS without selecting or notifying bidders. You must select bidders in order for them to receive an email notification.

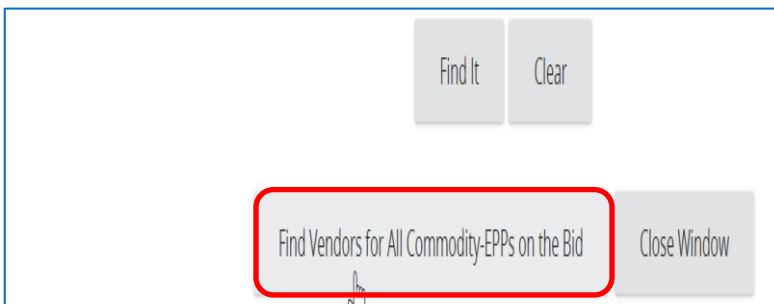
Select the radio button for **Unrestricted bid, all vendors can view and respond**. This will allow all vendors to view and respond.

NOTE: Selecting Unrestricted bid is a best practice since the notification will be sent to all vendors who have registered in COMMBUYS under the designated UNSPSC. This maintains a fair, open, and competitive bid process. If you do not click either Unrestricted or Restricted, COMMBUYS will default to Unrestricted status. Click the **Save & Continue** button if a change is made here.



Step 6: Searching for Vendors

After selecting Unrestricted bid, click on the **Lookup and Add Vendors** button at the bottom of the page to add bidders and notify vendors via email of a bid posting.



Step 7: Finding Vendors

The Lookup & Add Reference Vendors screen displays.

Scroll to the bottom of the screen and click on the **Find Vendors for All Commodity-EPPs on the Bid** button.

COMMBUYS automatically matches the vendors who have correctly registered with UNSPSC codes and their email to the bid.

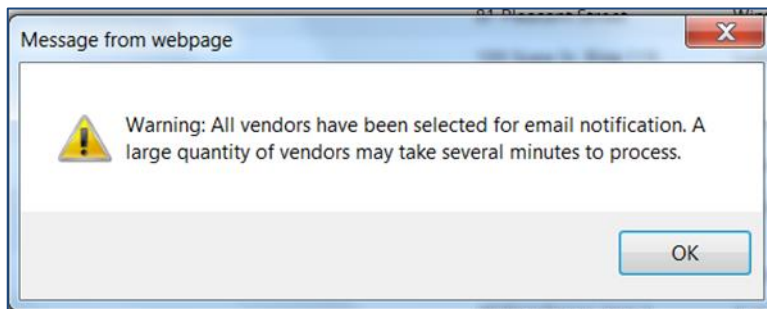
Buyers can also add vendors by name and also use the other search parameters listed and filter as appropriate.

Lookup & Add Reference Vendors - Bid BD-21-1990-BIDS1-BIDS1-52105

Vendor Lookup ⊞

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1 2 3 4

Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	PO Date	Address	City	State	Contact Name	Phone	Reference Vendor
<input type="checkbox"/>	00017178	2-Way Communications Service, Inc.				23 River Road	Newington	NH	Nicholas Hamel	(123)456-7890	No
<input type="checkbox"/>	00000862	7 Generations Inc.		May 1, 2015		P.O. Box 713	Pepperell	MA	Loretta Marino Sanford	(123)456-7890	No
<input type="checkbox"/>	200146	A and A Industrial Supply / ALBECCO Fastener, Inc.		Sep 15, 2016	Mar 24, 2016	792 Main Street	Tewksbury	MA	Ted Noble Morang, Sr.	(123)456-7890	No



Step 8: Selecting Vendors

All vendors from the search display.

1. To select all vendors, check the box at the top of the **Select** column. This will, in turn, check all the vendor boxes in the column. This is the best practice for adding multiple vendors.

NOTE: Vendors may also be selected one-by-one by selecting the checkboxes in the appropriate rows. Doing so constitutes a restricted bid and is no longer a best practice.

2. A dialog box displays when selecting all vendors. If this is satisfactory, click on the **OK** button.
3. Once the vendors have been selected, click on the **Save & Exit** button at the bottom of the screen.

General Items Address Accounting Routing Attachments(2) Notes **Bidders** Questions Amendment(1) Q&A Reminders Summary

General Subcontractors Quote Activity

Select bidder participation, open or closed, and select vendors to notify

Unrestricted bid, all vendors can view and respond

Restricted bid, only selected vendors can view and respond

Disable	Add	Vendor ID	Vendor Name	Vendor Address	Preferred Delivery Method	Bid Acknowledgment Time	Notifications
<input type="checkbox"/>	All To Master List						
<input type="checkbox"/>	<input type="checkbox"/>	00000000	City Point Partners LLC	11 Elkins Street Suite 470 Boston, MA 02127 US			

General Mailing Address - Colleen Moore 11 Elkins Street Suite 470... v

Add Manual Delivery
Delivery Date
Delivery Method

Step 9: Notifying Vendors

After selecting the vendors, the **Bidders General** screen displays, listing the Vendor ID, Name, Address and Preferred Delivery Method.

The process in Steps 5-8 can be repeated multiple times to ensure that vendors with different commodity codes relevant to your bid are included. COMMBUYS will create a combined notification list of all vendors you select through multiple vendor searches. If a vendor appears multiple times, COMMBUYS will keep the vendor's name on the list once to avoid duplicate notification.

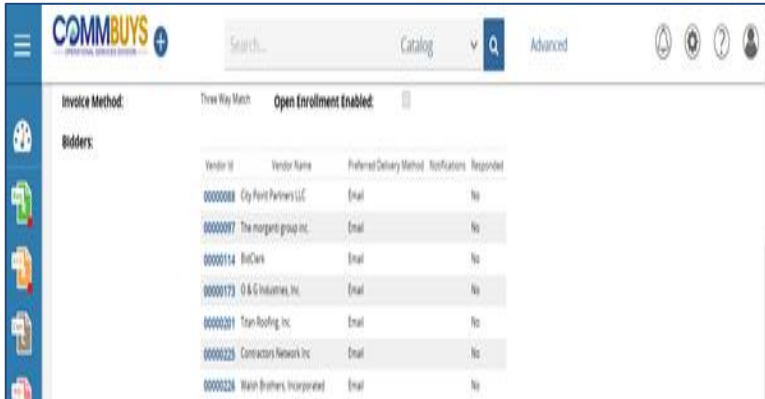
For Bids in Sent Status:

COMMBUYS will ask how you want to notify each vendor – simply select the contact date (the date you would like them to receive notification) and the method for each vendor you wish to add (email).

Once you have added vendors and notification information, the best practice is to issue an amendment to the original bid and include the following message: **“Issued additional bidder notification about this bid.”** This amendment will trigger an email notification to all vendors listed on the bid, including those who received previous notifications or if they were previously listed as bidders. To do this:

1. Click on the **Bid Amendment Summary** tab.
2. In the **Comment for the whole bid amendment** field enter: **Issued additional bidder notification about this bid.**
3. Click on the **Save & Continue** button.
4. When the screen redisplay, click on the **Apply Bid Amendment** button.
5. When the list of vendors displays click on the **OK** button.

The Bid summary tab displays.



Step 10: Reviewing the Vendors

On the Summary tab there is now a **Bidders** field in the middle of the **Header Information** section.

If you have already issued the bid (Sent status), and did not select vendors to notify of the bid opportunity, or need to add additional vendors to notify, you have now added bidders and you can stop at this step.

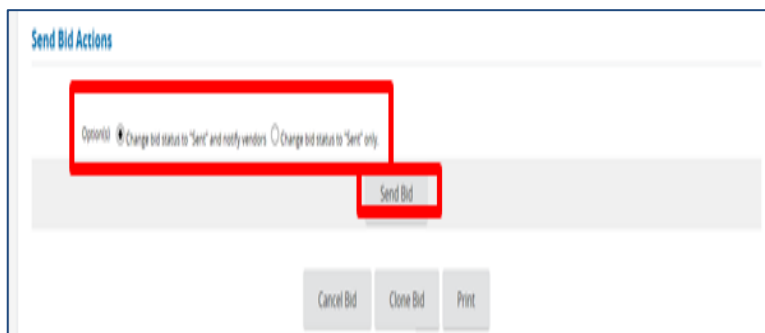


Step 11: Reviewing the Item Information

Review the Item Information section of the Summary tab to ensure that the correct UNSPSC codes were added.

If the bid was already in Sent status, you will not need to submit this for approval.

If the bid is in one of the other statuses, click on the **Submit for Approval** button at the bottom of the Summary tab.



Step 12: Sending the Bid

1. If the bid was not in Sent status, once the bid has been approved, search for it, then open it up to the Summary tab and scroll to the bottom of the Summary page.

The Buyer will have two radio button options in the **Send Bid Actions** section:

- Option 1: COMMBUYS defaults to **Change bid status to "Sent" and notify vendors**. The best practice is to keep the default (Option 1).
 - Option 2: **Change bid status to "Sent" only**. This does not send an email notification to the bidders.
2. Click on the **Send Bid** button. The document status changes to **2BS - Sent** status.