

Job Aid: How to Clone a Bid

This Job Aid shows how to:

- Clone a Bid in COMMBUYS

Of Special Note:

Bids (solicitations) are published documents that request price quotes on goods and services from potential vendors. Cloning will allow you to copy (or clone) a previously created bid in order to create a new bid, thus eliminating the need to re-enter much of the data. This job aid focuses on cloning a bid created in COMMBUYS.

Keep in mind: When cloning a Bid in COMMBUYS, you may need to do the following:

- All documents required should be added to the bid using the Attachments tab in COMMBUYS.

Remember to review all attachments and make changes, specifically to all time-sensitive information. The new bid will have a new bid number and allow you to edit data in any way you need to in order to update the bid information.

This job aid will provide you with the minimum information about cloning a bid. More detailed steps can be found in other bid job aids – *How to Create a Bid Using a Requisition* and *How to Create a Bid from Scratch*.


There are multiple ways to search for and display an existing bid from which to clone. One way is to click on the Bid Solicitations icon located on the left side of the home page.



A second way is to search for the bid solicitation using the Advanced Search functionality.



The third way is described and displayed in this job aid

Screenshot	Directions
	<p>Step 1: Creating a New Bid</p> <ol style="list-style-type: none">1. After logging in to COMMBUYS, click on the Add Documents (plus sign) icon.2. Select Bid Solicitation from the dropdown menu.

Screenshot

Directions

Create a New Bid

Please select the method to create a new bid:

Create a bid from scratch.

Clone a bid from another document.

Copy Contracts For Renewal.

Continue Cancel & Exit

Step 2: Cloning a New Bid From Another Document

1. Click on the radio button next to **Clone a bid from another document**.
2. Click on the **Continue** button.

COMMBUYS +
OPERATIONAL SERVICES DIVISION

Search

Search Documents to Clone to Bid

Search for: Requisitions Bids

Search Using: ALL of the criteria

Find It Clear

Step 3: Finding the Bid

1. The Search screen displays. Next to the Search for: field, click on the radio button for **Bids**.
2. Enter the search criteria for the bid that you wish to clone.

Some Search Options include:

- **Bid #:** COMMBUYS bid number
- **Bid Description:** information that was added in the Description field of the original bid (e.g.department number schema)
- **Purchaser**
- **Organization**
- **Department**

3. Click on the **Find It** button at the bottom of the page.

Results

Select	Bid #	Description	Purchase Method	Bid Opening Date	Dept/Loc	Purchaser	Total	Status	Alternate Id
<input checked="" type="radio"/>	BD-21-1990-BIDS1-BIDS1-60720	camping program_pm_04_15_21	Blanket	04/15/2021 10:30:00 AM	BIDS1 / BIDS1	Bill O'Malley15	\$0.00	Bid to PO	



Bid Solicitations View Mine

[In Progress](#)
[Ready for Approval](#)
[Returned](#)
[Ready to Send](#)
[Sent](#)
[Ready to Open](#)
[Opened](#)
[Evaluated](#)
[Approved](#)
[Gone to PO](#)

Bid Solicitation #	Description	Bid Type Code	Buyer	Dep / Loc	Bid Opening Date	Bid Tabulation	Quote History	Bid Holder
BD-21-1990-BIDS1-BIDS1-60720	camping program_pm_04_15_21	NS	Bill O'Malley15	BIDS1/BIDS1	04/15/2021 10:30:00	Bid Tab	Quote History	List

Bid Award Approval Path:

There are no approval paths found for this Bid.

System Warning(s)

Cloned bid is [BD-21-1990-BIDS1-BIDS1-60723](#)

Step 4: Selecting the Bid to Clone

1. The Search Results page appears with a list of bids created in COMMBUYS. Click on the **radio button** next to the Bid you wish to clone.
2. Click on the **Clone Bid & Exit** button.

If you want to add items to the cloned bid, click on the **Clone Bid & Add More Items** button.

NOTE: Another way to find your bid is to click on the **Bid Solicitation** icon in the left column of the home page.

When the screen displays, click on the status of the bid you are trying to locate, then click on the desired hyperlink in the **Bid Solicitation #** column

When the next screen displays, scroll to the bottom of the Summary page and click on the **Clone Bid** button.

A new Systems Warning box is displayed. Click on the new Cloned bid hyperlink that was created.

COMMBUYS

Open Market Bid BD-17-1080-OSD01-OSDEP-8685

General | Items | Address | Accounting | Billing | Measurement | News | Orders | Quotes | Attachments | E&A | Services | Summary

General Validation Errors
The following required fields are missing bid opening date available date
The following required fields are missing SBPP (Small Business Purchasing Program) Eligible?

Bid Number: BD-17-1080-OSD01-OSDEP-8685
Status: 20 - In Progress
How Selected: Email
Description: [Red Box]
Purchase: Martin, Paul
Type Code: NS - Non Statewide Solicitation
Fiscal Year: 2017
Department: OSD01 - Operational Services Division
Location: OSDEP - Congress St
Organization: Operational Services Division
Bid Opening Date: 11/08/2016 04:30:12 PM
Bid Type: Open Bid
Internal Bid: []
General Code: []
Estimated Cost: \$0.00
Purchase Method: Open Market
Bid Format: Bid Print
SBPP (Small Business Purchasing Program) Eligible?: Yes
User Last Updated: Paul Martin

Save & Continue

Copyright © 2016 Perceps Holdings, Inc. All Rights Reserved

Current Org: Operational Services Division | November 8, 2016 4:30:12 PM EDT

Step 5: Completing the New Bid General Tab

A new bid is created and opens to the **General** tab where important information about the bid is entered such as setting the bid dates and bid type.

NOTE: Red Validation errors display upon initial creation of the bid. These will resolve after entry of all required information.

Mandatory fields for the cloned bid:

- **Department:** select from the department from dropdown, if not automatically populated
- **Location:** select the location dropdown; if not automatically populated
- **Available Date:** date the bid will be viewable on COMMBUYS
- **Purchase Method:** select from the dropdown
 - a. **Open Market** – one-time bid
 - b. **Contract** – do not use
 - c. **Blanket** – results in a contract (departmental or statewide)
- **SBPP (Small Business Purchasing Program) Eligible?**
- **Description:** is a searchable field; enter short bid description (option to use your agency's Bid numbering schema)
- **Purchaser:** defaults to designated purchaser
- **Type Code:** dropdown; only use the two options below
 - a. **SS** – Statewide Solicitation (only OSD is authorized to create statewide contracts)
 - b. **NS** – Non-Statewide Solicitation
- **Fiscal Year:** will auto populate but can be changed
- **Bid Opening Date:** use the calendar icon to select the scheduled date to open the bid for review and award, which closes the bid to vendors. COMMBUYS will no longer accept quotes for that Bid and the Buyer is able to open and view quotes
- **Print Format:** defaults to Bid Print; ignore

Mandatory fields for a Blanket (contract):

- **Purchase Method:** dropdown; if Blanket is selected, two additional fields requiring input populate
- **Blanket Begin Date:** beginning date of the blanket, use the calendar icon to select date
- **Blanket End Dates:** blanket end date, use the calendar icon to select date

When data entry is complete, click on the **Save & Continue** button.

Step 6: Completing the Items Tab

1. Click on the **Items** tab. The Items tab opens.
2. If you would like to view the existing items, click on the **blue hyperlink** for the item in the Item # column.
3. Delete the item(s) if they do not apply to this new cloned bid by clicking the **checkbox** next to the item, or to delete all, click the top **Delete All** box.
4. Click on the **Save & Continue** button.
5. To add an item, click on the **Add Item** button.

Ensure that all changes are saved. You will also want to ensure that all information applies to this new bid and is verified prior to sending the bid to the vendor.

Open Market Bid BD-17-1080-RR001-RR001-8368

General Items **Address** Accounting Routing Attachments(0) Home Bidders Questions Attachments Q&A Resolvers Summary

Ship-to Address Bill-to Address

OOD Training OOD Training

OOD Training
1 Appleton Place
Suite 1017
Boston, MA 02108
US
Email: sa@percscopeholdings.com
Phone: (724)95-7900

OOD Training
1 Appleton Place
Suite 1017
Boston, MA 02108
US
Email: sa@percscopeholdings.com
Phone: (724)95-7900

Save & Continue Apply Ship-to to All Items Apply Bill-to to All Items

Copyright © 2014 Percscope Holdings, Inc. - All Rights Reserved.

Step 7: Reviewing Addresses

1. Click on the top-level **Address** tab.
2. The Address page should prefill. Update the Address page by clicking on the **magnifying glass icon** if items are being shipped to, or billed to, a different address than the default.

If no change is required go to Step 8.

3. If there is an error message indicating that no valid ship-to address exists, click on the **magnifying glass icon** to select a Ship-to address.

NOTE: If you want the option to ship to multiple addresses, go back to the Items tab and select the **Address sub tab**.

Open Market Bid BD-17-1080-RR003-RR003-8386

General Items Address Accounting Routing **Attachments** Home Bidders Questions Attachments Q&A Resolvers Summary

Files

Click Add File to add file attachments.

No File Attachments

Add File

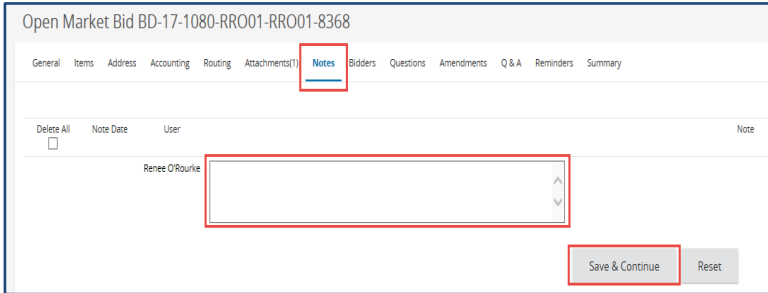
Copyright © 2014 Percscope Holdings, Inc. - All Rights Reserved.

Step 8: Adding Attachments

NOTE: The Accounting tab is not currently used in COMMBUYS. The Routing tab is not activated until after you submit it for approval.

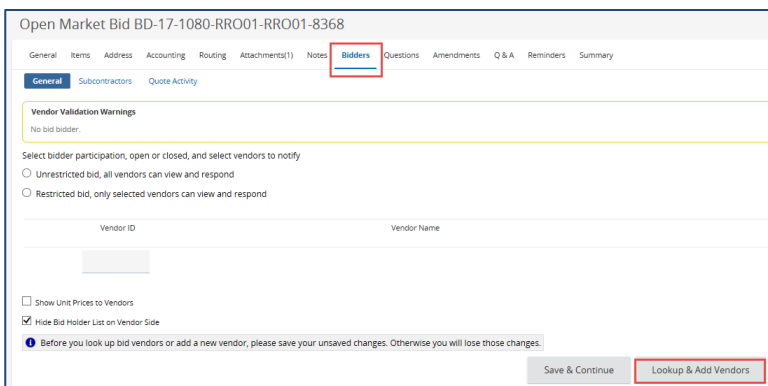
1. Click the **Attachments** tab. If any files auto-attach, review, keep, or delete as necessary. Attachments can include bid attachments and required forms and contract documents

NOTE: The process to follow for the remaining steps is described in detail in the other bid job aids – *How to Create a Bid Using a Requisition* and *How to Create a Bid from Scratch*.



Step 9: Adding Notes

Click on the **Notes** tab. Notes are brought over from the original bid. The option to add, modify, or delete an existing note is given. Ensure that any changes are saved.



Step 10: Adding Vendors

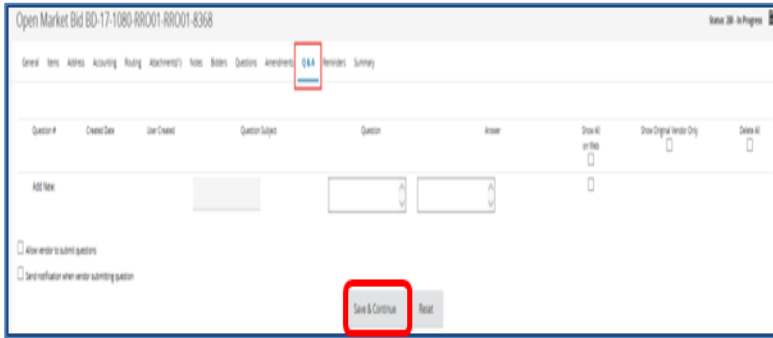
If you did not make any changes to the items tab, the vendors who were notified on your original bid are shown. Since new vendors register every day, it would be a wise to look up and add vendors again that match your item/service you are trying to purchase, and delete those you no longer wish to notify.

1. Click on the **Bidders** tab.
2. When the Bidders page opens, click on the **Lookup & Add Vendors** button at the bottom of the page.



Step 11: Entering Questions

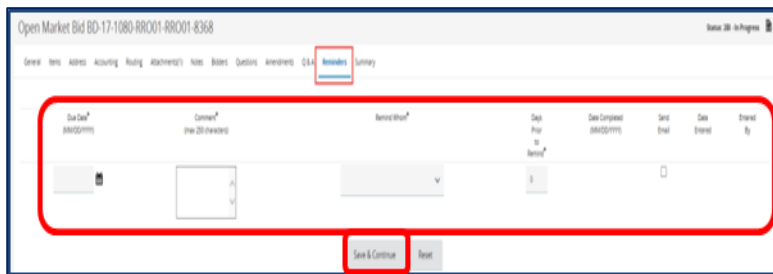
1. Click on the **Questions** tab.
2. Questions asked on the original bid are brought over. Delete, Modify or Add questions as necessary.



Step 12: Opening Q&A Dialogue

NOTE: The Amendments tab is not activated until after the bid is sent.

1. Click on the **Q&A** tab. Q&A from the original bid is not brought over.
2. To allow dialogue with vendors, select the **Allow vendor to submit questions** checkbox.
3. If you would like COMMBUYS to notify you when a vendor submits a question, select the **Send notification when vendor submitting question** checkbox.
4. If desired, you and/or the vendor can enter a **Question Subject** and **Question** into the respective fields, and the other party can respond in the **Answer** field.
5. If you wish to display the dialogue on the Web, select the **Show All on Web** checkbox. The **Show Original Vendor Only** checkbox is available if appropriate – refer to OSD and department policy.



Step 13: Entering Reminders

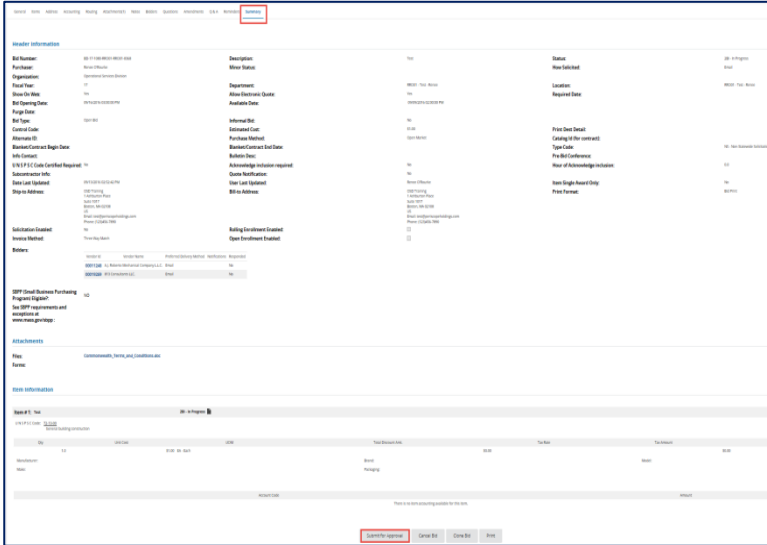
1. Click on the **Reminders** tab if you want to send a reminder to yourself or another person within your organization. Reminders are not brought over from the original bid.

Step 14: Reviewing the Bid

1. Click on the **Summary** tab to review all of the entered data.
2. When finished, scroll to the bottom of the page and click on the **Submit for Approval** button.

An approval path will display, or you're given the option to select an appropriate one. Click on the **Save & Continue** button to complete.

NOTE: The bid will now proceed through your department's approval path (**no image is provided here as your approval path will vary**). You will be informed by COMMBUYS email when the approval is complete, at which point you can log back into COMMBUYS and continue with Step 18.



Step 15: Sending the Bid to the Vendor

1. Once approved, locate the bid.
2. Select either the **Change bid status to "Sent" and notify vendors** radio button or the **Change bid status to "Sent" only** radio button.
3. Click on the **Send Bid** button.

The bid is now posted on **COMMBUYS**. Vendors may be able to respond depending on the available date set on the General tab.

