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.

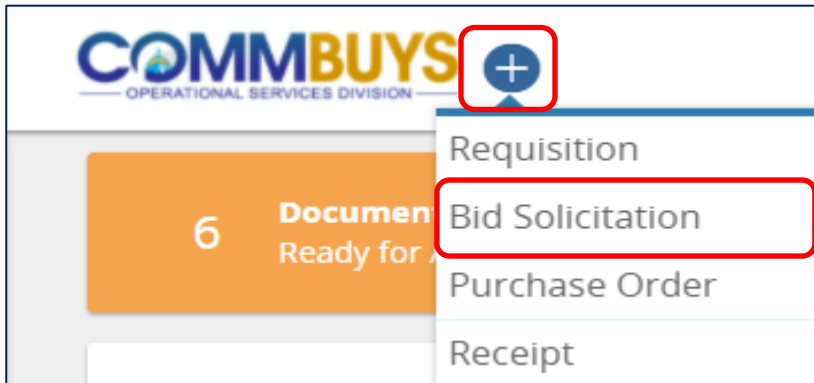A second way is to search for the bid solicitation using the Advanced Search functionality.
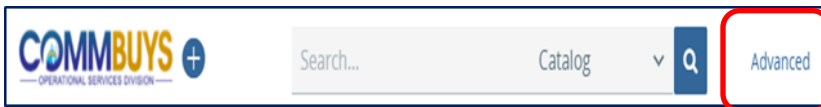
The third way is described and displayed in this job aid

Screenshot	Directions
	Step 1: Creating a New Bid 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 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.

Screenshot	Directions

Screenshot

Directions

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.

Screenshot	Directions

Screenshot

Blanket Bid BD-22-1990-BIDS1-BIDS1-69496

Status: 2BI - In Progress

General Items Address Accounting Routing Attachments(1) Notes Bidders Questions Amendments Q & A Reminders 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?, Procurement Type, Estimated Award Date]

Bid Number:	BD-22-1990-BIDS1-BIDS1-69496
Status:	2BI - In Progress
Type Code:	NS - Non-Statewide Solicitation
Department:*	BIDS1 - Procurement Department
Location:*	BIDS1 - Procurement
Show on Web:	☑
Required Date:	📅
Available Date :*(MM/DD/YYYY HH:MM:SS AM or PM)	📅
Bid Type:	Open Bid
Estimated Cost:	$0.00
Alternate ID:	
Purchase Method:*	Blanket
Blanket Begin Date:*(MM/DD/YYYY)	📅
Tax Rate:	
Solicitation Enabled:	No
Item Single Award Only:	☐
Allow Vendors to Submit Multiple/Alternate Quotes:	☑
Info Contact:	
Pre-Bid Conference: (Max size: 250 characters)	
Bulletin Desc: (Max size: 500 characters)	
Quote Notification:	☐

Description:*	widget
Purchaser:*	O'Malley15, Bill
Fiscal Year:*	2022
Organization:	Department of State Purchasing
Allow Electronic Response:	☑
Bid Opening Date:*(MM/DD/YYYY HH:MM:SS AM or PM)	📅
Informal Bid:	☐
Catalog Id:	
Blanket End Date:*(MM/DD/YYYY)	📅
Print Format:*	Bid Print
Enable Rolling Enrollment:	☐
Enable Open Enrollment:	☐

SBPP (Small Business Purchasing Program) Eligible? *:

See SBPP requirements and exceptions at www.mass.gov/sbpp

Procurement Type *:

Estimated Award Date *: (MM/DD/YYYY) 📅

Date Last Updated:	12/28/2021 10:00:52 AM	User Last Updated:	Bill O'Malley15

Save & Continue

Current Org: **Department of State Purchasing** ⇄ | December 28, 2021 10:02:09 AM EST

Directions

Step 5: Completing the New Bid General Tab

A new bid is created and opens to the **Summary** tab. Click on 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.

Fields to be completed for the cloned bid:
- **Type Code:** Using the dropdown arrow, select one of the following: • **NS:** Bid for a non-statewide (departmental) solicitation • **SS:** Bid for a statewide solicitation – for OSD use only.
- **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. **Blanket** – results in a contract (departmental or statewide).
- **SBPP (Small Business Purchasing Program) Eligible?:** select **Yes** if the annual expenditure is $250K or less. Select **No** if greater than $250K.
- **Procurement Type:** select the type of solicitation from the dropdown menu.
- **Estimated Award Date:** Enter the expected date the solicitation will be awarded.
- **Description:** is a searchable field; enter short bid description (option to use your agency's Bid numbering schema).
- **Purchaser**: defaults to designated purchaser.
- **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.

Screenshot	Directions
	Additional Mandatory Fields When Blanket is Selected in the Purchase Method Field:
	• **Blanket Begin Date**: beginning date of the blanket, use the calendar icon to select date.
	• **Blanket End Date:**: 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.

Screenshot	Directions

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**.

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.

Click on the **Attachments** tab. Adding attachments is done in the same fashion as used to attach to the original cloned bid. If any files auto-attach, review and keep or delete as necessary. Attachments can include bid attachments and required forms and contract documents.

NOTE: The process to follow for this and all 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.*

Screenshot	Directions

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.

Screenshot	Directions
	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.

Screenshot	Directions

Screenshot

Blanket Bid BD-22-1990-BIDS1-BIDS1-69495

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

Header Information

Bid Number:	BD-22-1990-BIDS1-BIDS1-69495	Description:	widget	Status:	
Purchaser:	Bill O'Malley15	Minor Status:			
Organization:	Department of State Purchasing				
Fiscal Year:	22	Department:	BIDS1 - Procurement Department	Location:	
Show On Web:	Yes	Allow Electronic Quote:	Yes	Required Date:	
Bid Opening Date:	12/28/2021 10:00:00 AM	Available Date:	12/28/2021 09:00:58 AM		
Bid Type:	Open Bid	Informal Bid:	No		
Estimated Cost:	$0.00				
Alternate ID:		Purchase Method:	Blanket	Catalog Id (for contract):	
Blanket/Contract Begin Date:	01/03/2022 12:00:00 AM	Blanket/Contract End Date:	01/03/2025 12:00:00 AM	Type Code:	

00033676 Siemens Mobility, Inc.	Email	No	
00033759 Calico Resource and Solutions Group, Inc.	Email	No	
00034764 Russelectric Inc	Email	No	

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1 2

SBPP (Small Business Purchasing Program) Eligible?:	YES
See SBPP requirements and exceptions at www.mass.gov/sbpp :	
Procurement Type:	Request for Response
Estimated Award Date:	12/31/2021

Attachments

Files:	Camping RFR~32.docx
Forms:	

Required Quote Attachments

Item Information

Item # 1: widget   2BI - In Progress

U N S P S C Code: 73-17-00
Manufacture of electrical goods and precision instruments

Disable Pricing On Quote	Qty	Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount
Yes	1.0	$0.00	EA - Each		$0.00	

Manufacturer:	Brand:	Model:	
Make:	Packaging:		
Product Length:	Product Width:	Product Height:	Product Weight:
UPC/ISBN:	SKU:		
Tags:	URL:		

Account Code	Amount
There is no item accounting available for this item.	

Submit for Approval   Cancel Bid   Clone Bid   Print

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Current Org: **Department of State Purchasing** ⇄ | December 28, 2021 9:04:17 AM EST

Directions

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 15.

Screenshot	Directions
Send Bid Actions Option(s) ⦿ Change bid status to "Sent" and notify vendors ◯ Change bid status to "Sent" only. Send Bid Cancel Bid Clone Bid Print	**Step 15: Sending the Bid to the Vendor** 1. Once approved, locate and open the bid. 2. At the bottom of the page, select either the **Change bid status to "Sent" and notify vendors** radio button (the usual practice) 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.

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