

Job Aid: How to Create a Bid Using an Open Market Requisition

This Job Aid shows how to:

- Create a Bid Solicitation from an Open Market Requisition for goods and services not available on a Statewide Contract (SWC).

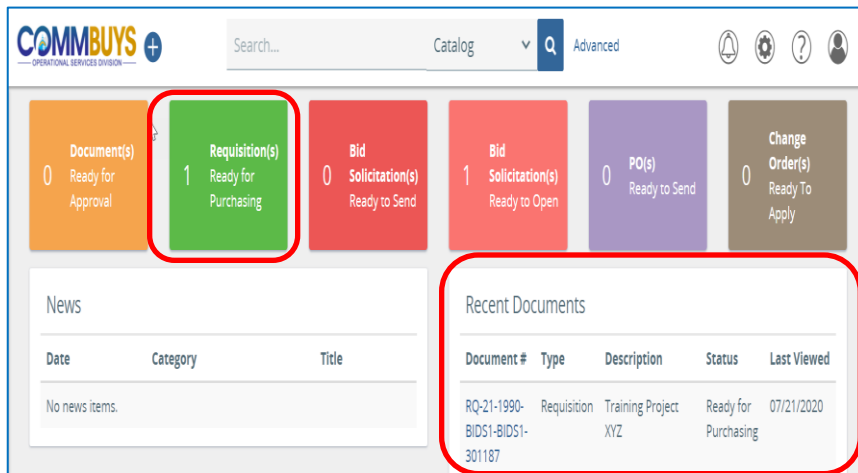
Of Special Note:

Open market items are those items not available on a SWC. An Open Market Bid can be created for:

- A one-time purchase for goods and services which can be converted to a Purchase Order (PO), or
- creation of an ongoing contract which can be converted to a Master Blanket Purchase Order (MBPO).

Screenshot

Directions



Step 1: Locating the Requisition

After approval, the status of the open market requisition changed to **Ready for Purchasing**. Locate the approved requisition from the main menu by clicking on the green **Requisition(s) Ready for Purchasing** box.

The requisition might also be found in the **Recent Documents** section of the page. If so, click on the blue hyperlink in the Document # column and skip down to Step 3.

Requisitions								
In Progress Ready for Approval Returned Ready for Purchasing Gone to PO Gone to Bid								
Requisition #	Description	Req Type	Requestor	Purchaser	Dep / Loc	Created Date	Total	Submitted Date
RQ-21-1990-BIDS1-BIDS1-301187	Training Project XYZ	Open Market	Bill O'Malley15	Bill O'Malley15	BIDS1/BIDS1	07/21/2020	\$0.00	07/21/2020

Step 2: Clicking on the Hyperlink

After clicking on the green **Requisition(s) Ready for Purchasing** box, click on the blue hyperlink in the **Requisition #** column to open the desired requisition.

Screenshot

Directions

Step 3: Converting the Requisition to a Bid

The requisition opens to the **Summary** tab.

Scroll to the bottom of the page and click on the **Convert to Bid** button.

The screenshot shows the requisition summary page. At the top is the 'Item Information' section. Below it is the 'Approval Paths' section, which states 'There are no approval paths found for this requisition.' The 'Approval Actions' section contains a 'Disapprove' button and a 'Comment' field. At the bottom, there is a 'Save & Exit' button and a row of buttons: 'Convert to Bid', 'Convert to PO', 'Cancel Requisition', 'Clone Requisition', and 'Print'. The 'Convert to Bid' button is highlighted with a red rectangle.

Step 4: Verifying the Conversion

A popup message displays asking if you are sure. Click on the **OK** button to confirm.

The screenshot shows a confirmation popup message. It contains the text 'www.training.commbuys.com says' and 'Are you sure you want to convert this requisition to a bid?'. At the bottom right, there are two buttons: 'OK' and 'Cancel'.

Step 5: Opening the Bid

The Requisition screen redisplayes with a **Gone to Bid** status. Click on the **blue hyperlink** in the yellow System Warning(s) box to open the bid.

The screenshot shows the requisition summary page for 'Open Market Requisition RQ-21-1990-BIDS1-BIDS1-301187'. The status is 'Status: TRGB - Gone to Bid'. The 'Summary' tab is selected. A yellow 'System Warning(s)' box is displayed, containing the text 'New bid is [BD-21-1990-BIDS1-BIDS1-52110](#)'. The 'Convert to Bid' button from the previous screenshot is also visible in the top right corner.

Step 6: Viewing the Bid Summary Screen

The Summary screen opens with a warning displaying Validation Errors. Click on the **General** tab.

The screenshot displays the 'Open Market Bid BD-21-1990-BIDS1-BIDS1-52110' page. The 'General' tab is selected and highlighted with a red box. Below the tabs, a red-bordered box contains the following text:

Overall 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].

A large blue arrow points from the right towards the validation error messages. Below the error box, the text 'Header Information' is visible.

Open Market Bid BD-22-1990-BIDS1-BIDS1-69499 Status: 201 - In Progress

General Items Address Accounting Routing Attachments() 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-BIDS1-69499	Description:	test for job aid
Status:		Purchase:	O'Malley15, Bill
Type Code:		Fiscal Year:	2022
Department:	BIDS1 - Procurement Department	Organization:	Department of State Purchasing
Location:	BIDS1 - Procurement	Allow Electronic Response:	<input checked="" type="checkbox"/>
Show on Web:	<input checked="" type="checkbox"/>	Bid Opening Date:	(MM/DD/YYYY HH:MM:SS AM or PM)
Required Date:		Informal Bid:	<input type="checkbox"/>
Available Date:	(MM/DD/YYYY HH:MM:SS AM or PM)	Catalog Id:	
Bid Type:	Closed Bid	Blanket End Date:	(MM/DD/YYYY)
Estimated Cost:	\$1.00	Print Format:	Bid Print
Alternate ID:		Enable Rolling Enrollment:	<input type="checkbox"/>
Purchase Method:	Blanket	Enable Open Enrollment:	<input type="checkbox"/>
Blanket Begin Date:	(MM/DD/YYYY)		
Tax Rate:			
Solicitation Enabled:	Yes		
Item Single Award Only:	<input type="checkbox"/>		
Allow Vendors to Submit Multiple/Alternate Quotes:	<input checked="" type="checkbox"/>		
Info Contact:	Contact Bill O'Malley15 at (617)899-9999		
Pre-Bid Conference:			
Bulletin Desc:			
Quote Notification:	<input type="checkbox"/>		
SBPP (Small Business Purchasing Program) Eligible:			
See SBPP requirements and exceptions at www.mass.gov/sbopp			
Procurement Type:			
Estimated Award Date:	(MM/DD/YYYY)		
Date Last Updated:	12/30/2021 11:24:07 PM	User Last Updated:	Bill O'Malley15

Save & Continue

Step 7: Completing the Bid General Tab

The **General** tab displays. All information from the requisition (except Notes/Reminders) is automatically populated into the bid. The fields that require completion include:

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.**

Available Date*: Enter the date the bid (solicitation) will be made available for vendors to view and submit quotes.

Click on the calendar icon to set the desired month, day, and time.

Bid Opening Date*: Enter the date that quotes will no longer be accepted and submitted quotes can be opened for viewing. Click on the calendar icon to set the desired month, day, and time (using the slide bars).

NOTE: If the year must be changed, select the desired year before selecting the month, day, and time.

Purchase Method*: The following options display in the dropdown menu:

- **Open Market:** Select for a one-time purchase/award
- **Blanket:** Select if the Bid is going to result in a contract award. If selected, a pop-up message appears. Click on the **OK** button and two new fields will display and must be completed:
 - **Blanket Begin Date:** (the estimated contract beginning date)
 - **Blanket End Date:** the (estimated contract ending date).

Screenshot

Directions

SBPP (Small Business Purchasing Program) Eligible?* – If displayed, select **Yes** from the dropdown menu if the transaction will likely total \$250K or less. Select **No** if over \$250K or if not applicable.

Procurement Type: Use the dropdown menu to select the type of solicitation.

Estimated Award Date: Enter the anticipated date the solicitation will be awarded.

Click on the **Save and Continue** button.

Step 8: Verifying or Completing the Items Tab

Blanket Bid BD-21-1990-BIDS1-BIDS1-52110 Status: ZBI - In Progress

[General](#) [Items](#) [Address](#) [Accounting](#) [Routing](#) [Attachments\(1\)](#) [Notes](#) [Bidders](#) [Questions](#) [Amendments](#) [Q & A](#) [Reminders](#) [Summary](#)

Item #	Link	Print Sequence	Item Description							Total Cost	Requote	Quote At
			Disable Pricing On Quote	Quantity	UOM	Unit Cost	Net Unit Cost	Total Discount Amt.	Tax Rate	Tax Amount		
1	Req # Item # RQ-21-1990-BID31-BID31-301197 /	1.0	water safety equipment	1.0	EA	0.00	\$0.00	\$0.00	0.0	\$0.00	\$0.00	
Total										\$0.00		

Open Market Bid BD-21-1990-BIDS1-BIDS1-52113

General

Items

Address

Accounting

Routing

Attachments

Notes

Bidders

Questions

General

Address

Accounting

Routing

Attachments

Notes

Questions

Search Items

Search Inventory Items

Add Item

Upload Items

Export Items

Click Items' or 'Add Item' below to add an item.

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A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC
Item Num	Print Seq	Item Type	Stock Item	Description	Usable In Fixed Asset	Quantity	UOM	Unit Cost	Discount %	Total Disc	Net Unit Cost	Tax Rate	NSP Class	NSP Class Commodity	Manufacturer	Brand	Model	Make	Packaging Product	In-Product	Product w/UPC/EAN/SKU	Tags						

1. Click on the **Items** tab.
2. If you have added a general item description as a placeholder with the intention of including the items in an attachment to the solicitation, go to Step 11.
3. If you have added a few items manually and they are correct, go to Step 11.
4. If you intend to add items to the COMMBUYS .csv (comma separated values) template, select the checkbox in the **Delete All** column, then click on the **Save & Continue** button at the bottom of the page.
5. A popup box displays. Click on the **OK** button.
6. Click on the **Export Items** button. A .csv file box displays on the bottom of your screen. Click on the .csv file to open the Items template.
7. Complete the columns in the template, either by copying over from a saved template, a saved .xls (Excel) file, or by manually entering the items. The required fields include: Item Number, Print Sequence, Item Type, Description, Quantity, UOM (Unit of Measure), NIGP Class ID (UNSPSC Segment-Family), and NIGP Class Item (UNSPSC Class).
8. Save this file as a .csv to your desktop, downloads, documents file or other desired location.

Step 9: Adding Items from the Template

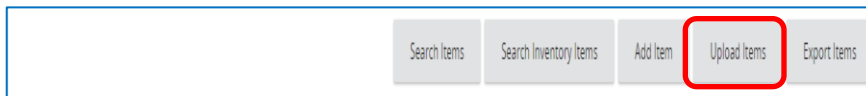
1. Return to the Items tab and click on the **Upload Items** button.
2. Click on the **Choose File** button.

NOTE: This button may be labeled as **Browse** on some browsers.

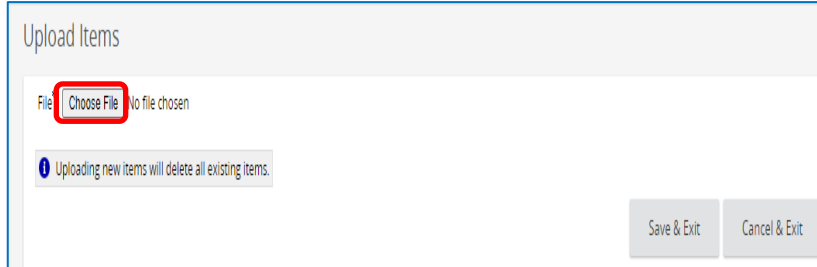
3. When the files display, select the file to upload and click on the **Open** button.

4. The uploaded filename displays on the Upload Items screen. Click on the **Save & Exit** button.

5. A popup message reminds you that this upload will replace any existing items on the bid. Click on the **OK** button.



Search Items Search Inventory Items Add Item **Upload Items** Export Items

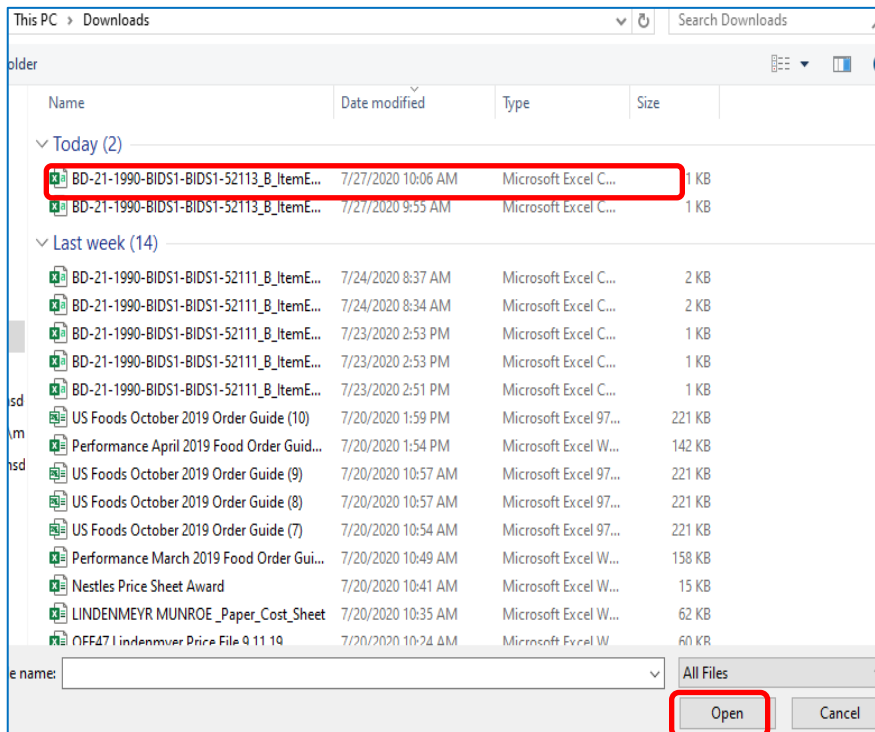


Upload Items

File: **Choose File** No file chosen

Uploading new items will delete all existing items.

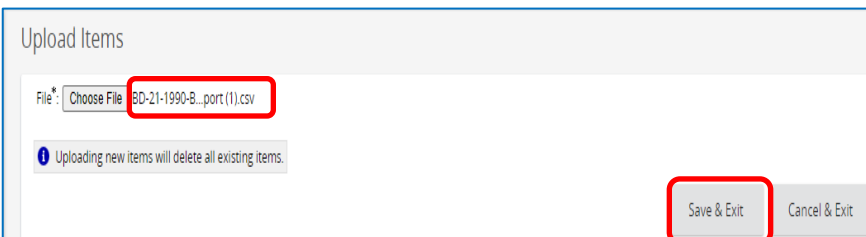
Save & Exit Cancel & Exit



This PC > Downloads

Name	Date modified	Type	Size
Today (2)			
BD-21-1990-BIDS1-BIDS1-52113_B_ItemE...	7/27/2020 10:06 AM	Microsoft Excel C...	1 KB
BD-21-1990-BIDS1-BIDS1-52113_B_ItemE...	7/27/2020 9:55 AM	Microsoft Excel C...	1 KB
Last week (14)			
BD-21-1990-BIDS1-BIDS1-52111_B_ItemE...	7/24/2020 8:37 AM	Microsoft Excel C...	2 KB
BD-21-1990-BIDS1-BIDS1-52111_B_ItemE...	7/24/2020 8:34 AM	Microsoft Excel C...	2 KB
BD-21-1990-BIDS1-BIDS1-52111_B_ItemE...	7/23/2020 2:53 PM	Microsoft Excel C...	1 KB
BD-21-1990-BIDS1-BIDS1-52111_B_ItemE...	7/23/2020 2:53 PM	Microsoft Excel C...	1 KB
BD-21-1990-BIDS1-BIDS1-52111_B_ItemE...	7/23/2020 2:51 PM	Microsoft Excel C...	1 KB
US Foods October 2019 Order Guide (10)	7/20/2020 1:59 PM	Microsoft Excel 97...	221 KB
Performance April 2019 Food Order Guid...	7/20/2020 1:54 PM	Microsoft Excel W...	142 KB
US Foods October 2019 Order Guide (9)	7/20/2020 10:57 AM	Microsoft Excel 97...	221 KB
US Foods October 2019 Order Guide (8)	7/20/2020 10:57 AM	Microsoft Excel 97...	221 KB
US Foods October 2019 Order Guide (7)	7/20/2020 10:54 AM	Microsoft Excel 97...	221 KB
Performance March 2019 Food Order Gui...	7/20/2020 10:49 AM	Microsoft Excel W...	158 KB
Nestles Price Sheet Award	7/20/2020 10:41 AM	Microsoft Excel W...	15 KB
LINDENMEYR MUNROE_Paper_Cost_Sheet	7/20/2020 10:35 AM	Microsoft Excel W...	62 KB
OFF471 lindenmeyer Price File 9 11 19	7/20/2020 10:24 AM	Microsoft Excel W...	60 KB

File name: All Files **Open** Cancel

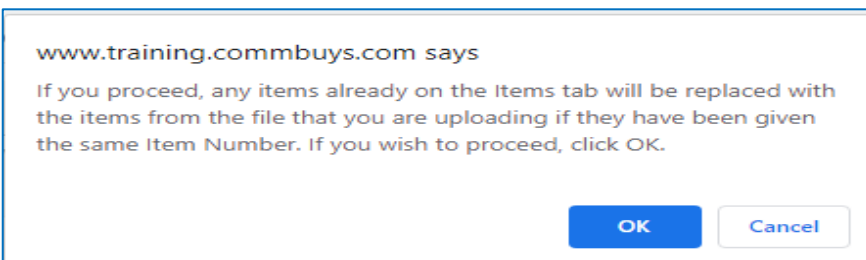


Upload Items

File: **Choose File** **BD-21-1990-B...port (1).csv**

Uploading new items will delete all existing items.

Save & Exit Cancel & Exit



www.training.commbuys.com says

If you proceed, any items already on the Items tab will be replaced with the items from the file that you are uploading if they have been given the same Item Number. If you wish to proceed, click OK.

OK Cancel

Screenshot

Directions

Step 10: Verifying the Upload

1. Review the upload for accuracy. If errors are found, the uploaded file can be corrected and then uploaded.

Item #	Print Sequence	Item Description	Quantity	Unit	Unit Cost	Net Unit Cost	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost	Reproducible	Delete All
2001	1.0	life vest	No	200.0	EA	0.00	\$0.00	\$0.00	0.0	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
20	2.0	life ring	No	50.0	EA	0.00	\$0.00	\$0.00	0.0	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
0485	3.0	pool rope	No	50.0	EA	0.00	\$0.00	\$0.00	0.0	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
2	4.0	pool alarm	No	50.0	EA	0.00	\$0.00	\$0.00	0.0	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>

Step 11: Verifying the Address and Attachments Tabs

1. Click on the **Address** tab. Verify that the Ship-to and Bill-to addresses are correct.
2. Click on the **Attachments** tab. Verify and/or add files if needed. Attachments may include all the elements of a Bid Solicitation including the solicitation (RFR, etc.), terms and conditions, a list of the items, and so on.

Blanket Bid BD-21-1990-BIDS1-BIDS1-52110 Status: 2B1 - In Progress

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

Step 12: Verifying the Bidders Tab

1. Click on the **Bidders** tab. The Vendors identified in the Requisition will display.
2. If you have cause to delete vendors from the original list, select the radio button next to **Restricted** bid.
3. Amend the list of Bidders by deselecting the checkbox in the Delete column for those vendors you wish to eliminate. (**NOTE:** This is not a best practice).
4. To add more Bidders, click on the **Lookup & Add Vendors** button at the bottom of the page.
5. If any changes have been made to the Bidders tab, click on the **Save & Continue** button; otherwise go to the next step.

Blanket Bid BD-21-1990-BIDS1-BIDS1-52110 Status: 2B1 - In Progress

General Items **Bidders** Accounting Routing Attachments(1) Notes Questions Amendments 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**

Delete	Vendor ID	Vendor Name	Vendor Address	Preferred Delivery Method
<input type="checkbox"/>	00000204	Alliance Detective & Security Service, Inc.	930 Broadway Everett, MA 02149 US	

General Mailing Address - Scott Cummings 930 Broadway Everett, MA...

Screenshot

Delete All	Question #	Print Sequence	Required	Question	Response Type
<input type="checkbox"/>	0	1.0	<input type="checkbox"/>		Availability response ▼

Directions

Step 13: Completing the Questions Tab

If you have questions to ask of bidders:

1. Click on the **Questions** tab.
2. Select the **Required** checkbox. Doing so will require vendors to answer the question before their quote can be submitted.
3. Enter the question text in the **Question** field.
4. Select a value from the **Response Type** dropdown list to establish a format for the vendor response.
5. Click on the **Save & Continue** button to save your entries.

NOTE: The next tab is the **Amendments** tab which has no functionality until after the bid is posted.

Screenshot

Question #	Created Date	User Created	Question Subject	Question	Answer	Show All on Web	Show Original Vendor Only	Delete All
Add New:						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

☐ Allow vendor to submit questions
☐ Send notification when vendor submitting question

Directions

Step 14: Completing the Q&A Tab

1. Click on the **Q&A** tab.
2. To dialogue with vendors, select the **Allow vendor to submit questions** checkbox.
3. If you would like COMMBUYS to notify you by email when a vendor submits a question, select the **Send notification when vendor submitting question** checkbox.

NOTE: Numbers 2 and 3 above are considered a best practice.

4. Click on the **Save & Continue** button.

NOTE: When a question is received, provide an answer and ensure that the **Show All on Web** checkboxes are checked, and that the **Show Original Vendor Only** checkboxes are unchecked. This is the best practice as all questions and answers will be viewable by all vendors. All questions and answers may be subject to disclosure through Freedom of Information Act requests.

Step 15: Submitting for Approval

1. Click on the **Summary** tab to review the bid information.
2. Scroll to the bottom of the page and click on the **Submit for Approval** button.

There is no item accounting available for this item.

Screenshot

Send Bid Actions

☒ Change bid status to "Sent" and notify vendors
 ☐ Change bid status to "Sent" only.

Send Bid

Cancel Bid Clone Bid Print

Directions

Step 16: Sending the Bid

1. Click on the **Summary** tab to review the bid information. Ensure that the radio button next to **Change Bid Status to "Sent" and Notify Vendors** is selected.
2. Scroll to the bottom of the page and click on the **Send Bid** button.

Step 17: Verifying the Bidders

The list of bidders (vendors) to notify by email displays. Click on the **OK** button to verify.

COMMbuys Search... Catalog Advanced

Vendor Notification Result

Subject: Bid Notification - Bid # BD-21-1990-BIDS1-BIDS1-52110, Training Project XYZ

Email Recipients

Delivery Date: 07/23/2020 11:29:42 AM

Vendor ID	Vendor Name	Email Address
300123	Adams Industries Corp.	Dawn Davidson (test@perscopeholdings.com)
00043714	AquaLine Pure Water Services, Inc.	Jeff Long (test@perscopeholdings.com)
00030144	Columbus Scuba Inc	Andrew Silverman (test@perscopeholdings.com)
00017720	Angel-GUARD Products, Inc.	Michael Shea (test@perscopeholdings.com)
0004040	BRAN-ART, Inc.	Andrew Braun (test@perscopeholdings.com)
00036424	Cutter Enterprises LLC	Patrick Dwyer (test@perscopeholdings.com)
209332	Boston Data Group, Inc.	Walter Corcoran (test@perscopeholdings.com)
00003837	Agathos Laboratories, Inc.	Paul Monah (test@perscopeholdings.com)
00002951	D.O.T. FLEETPARTS	JACK BELLAN (test@perscopeholdings.com)
229881	Apollo Safety Inc.	Tracy Carvalho (test@perscopeholdings.com)
00000862	7 Generations Inc	Loretta Marino Sanford (test@perscopeholdings.com)
200146	A and A Industrial Supply / ALBECO Fastener, Inc.	Ted Noble Morang, Sr. (test@perscopeholdings.com)
00032157	Brave Industrial Paint LLC	Luciane Gacul (test@perscopeholdings.com)
00001737	Atlantic Tactical, Inc.	Tom Caruso (test@perscopeholdings.com)
00000204	Alliance Detective & Security Service, Inc.	Scott Cummings (test@perscopeholdings.com)
00016986	Bass Pro Outdoor World LLC	Christine Marques (test@perscopeholdings.com)
00033328	Blank Industries, LLC	Erin Williams (test@perscopeholdings.com)
00008101	ApplMed Corp.	Oliver Udenba (test@perscopeholdings.com)
300199	Communications International, Inc.	Lisa Benicasa (test@perscopeholdings.com)
00000913	Body Armor Outlet, LLC	Raymond Beila (test@perscopeholdings.com)
00035888	Capewell Aerial Systems	Tracy White (test@perscopeholdings.com)
00029700	Bane	William Bane (test@perscopeholdings.com)
219394	Bingham Industries, Inc.	Jody Bagdis (test@perscopeholdings.com)
00017178	2-Way Communications Service, Inc.	Nicholas Hamel (test@perscopeholdings.com)
216361	All Sports - Heres Uniforms, Sporting Goods & Promotions	Charles E. Kuenler (test@perscopeholdings.com)

OK

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Current Org: Department of State Purchasing | July 23, 2020 11:30:01 AM EST