

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).

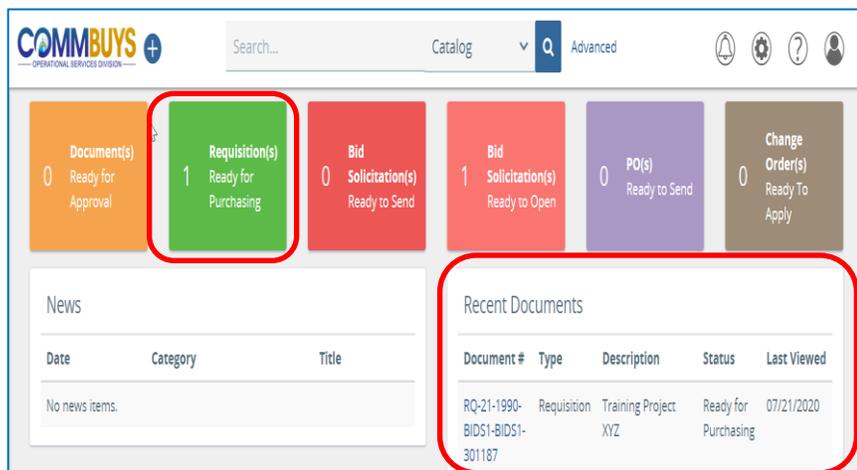
Of Special Note:

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



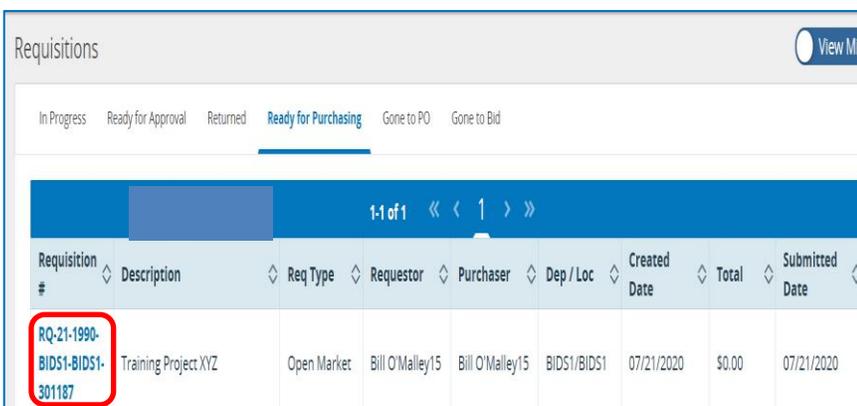
The screenshot shows the COMMBUYS+ dashboard. At the top, there is a search bar and navigation options. Below this, there are several status boxes: 'Document(s) Ready for Approval' (0), 'Requisition(s) Ready for Purchasing' (1, highlighted in green), 'Bid Solicitation(s) Ready to Send' (0), 'Bid Solicitation(s) Ready to Open' (1), 'PO(s) Ready to Send' (0), and 'Change Order(s) Ready To Apply' (0). Below the status boxes, there are two sections: 'News' (empty) and 'Recent Documents'. The 'Recent Documents' table has the following data:

Document #	Type	Description	Status	Last Viewed
RQ-21-1990-BIDS1-BIDS1-301187	Requisition	Training Project XYZ	Ready for Purchasing	07/21/2020

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.



The screenshot shows the 'Requisitions' page. At the top, there are tabs for 'In Progress', 'Ready for Approval', 'Returned', 'Ready for Purchasing' (selected), 'Gone to PO', and 'Gone to Bid'. Below the tabs, there is a table with the following data:

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

The screenshot shows a web interface for requisition management. It has three main sections: 'Item Information', 'Approval Paths', and 'Approval Actions'. The 'Approval Paths' section contains the text 'There are no approval paths found for this requisition.' The 'Approval Actions' section includes a 'Disapprove' radio button, a 'Comment' text input field, and a 'Save & Exit' button. At the bottom, there is a row of buttons: 'Convert to Bid' (highlighted with a red box), 'Convert to PO', 'Cancel Requisition', 'Clone Requisition', and 'Print'. A small copyright notice 'Copyright © 2014 Perichon Holdings, Inc. All Rights Reserved.' is visible at the bottom right of the interface.

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.

Step 4: Verifying the Conversion

A confirmation popup message with a white background and a blue border. The text reads: 'www.training.commbuys.com says' followed by 'Are you sure you want to convert this requisition to a bid?'. At the bottom right, there are two buttons: a blue 'OK' button and a white 'Cancel' button with a blue border.

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

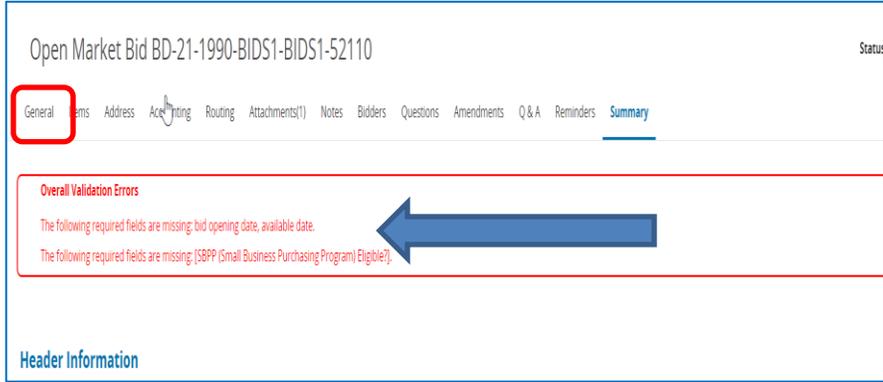
Step 5: Opening the Bid

The screenshot shows the 'Open Market Requisition RQ-21-1990-BIDS1-BIDS1-301187' page. The status is 'Status: IRGB - Gone to Bid' (highlighted with a red box). The page has tabs for 'General', 'Items', 'Vendors', 'Address', 'Accounting', 'Routing', 'Attachments()', 'Notes', 'Reminders', and 'Summary'. A yellow 'System Warning(s)' box is present, containing the text 'New bid is [BD-21-1990-BIDS1-BIDS1-52110](#)' (the hyperlink is highlighted with a red box).

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

Step 6: Viewing the Bid Summary Screen

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



Open Market Bid BD-22-1990-BIDS1-BIDS1-69499 Status: 20 - 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:		Purchaser:	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:		Available Date:	(MM/DD/YYYY HH:MM:SS AM or PM)
Bid Type:	Closed Bid	Informal Bid:	<input type="checkbox"/>
Estimated Cost:	\$1.00	Catalog Id:	
Alternate ID:		Blanket End Date:	(MM/DD/YYYY)
Purchase Method:	Blanket	Blanket Begin Date:	(MM/DD/YYYY)
Blanket Begin Date:		Tax Rate:	
Solicitation Enabled:	Yes	Print Format:	Bid Print
Item Single Award Only:	<input type="checkbox"/>	Enable Rolling Enrollment:	<input type="checkbox"/>
Allow Vendors to Submit Multiple/Alternate Quotes:	<input checked="" type="checkbox"/>	Enable Open Enrollment:	<input type="checkbox"/>
Info Contact:	Contact: Bill O'Malley15 at (617)899-9999	Quote Notification:	<input type="checkbox"/>
Pre-Bid Conference:		SBPP (Small Business Purchasing Program) Eligible?:	
Bulletin Desc:		See SBPP requirements and exceptions at www.mass.gov/sopp	
Procurement Type:		Procurement Type:	
Estimated Award Date:		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 9: Adding Items from the Template

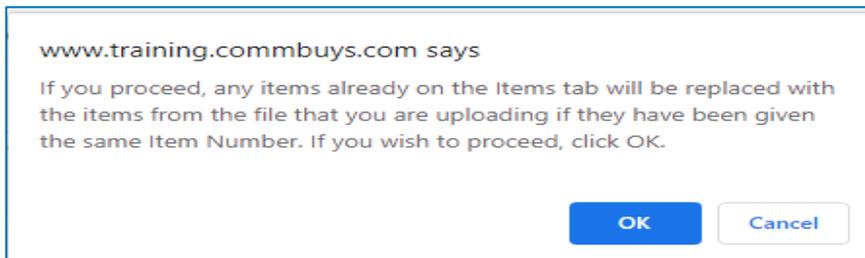
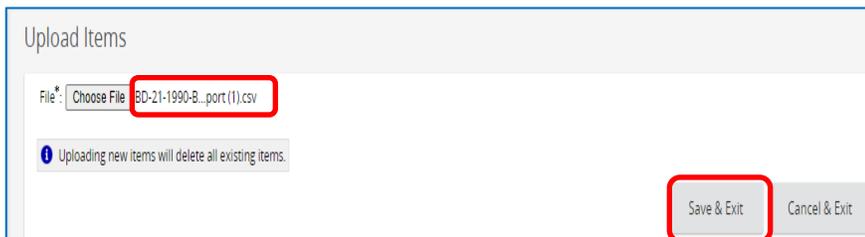
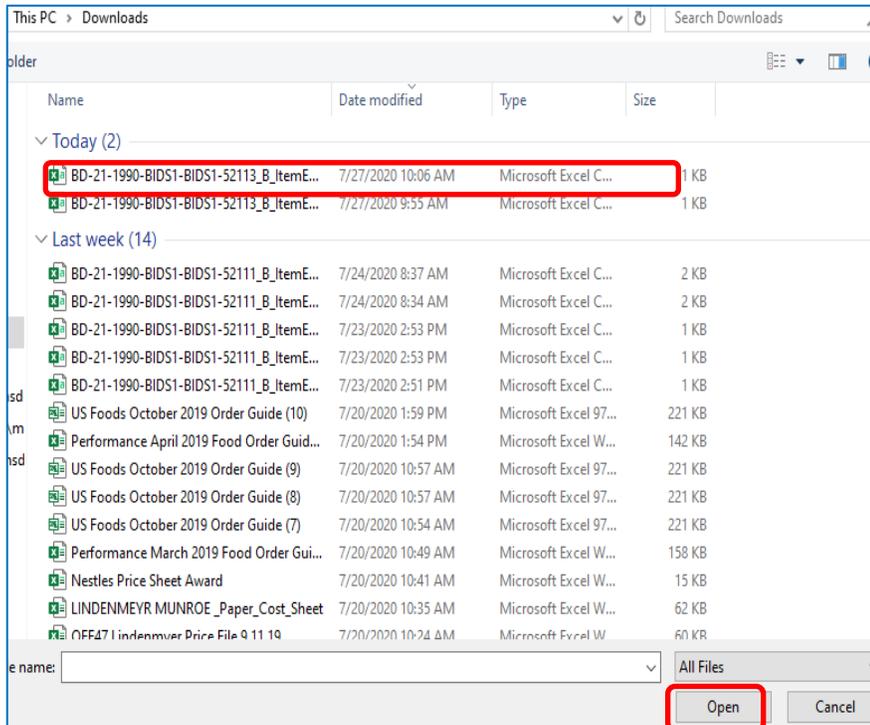
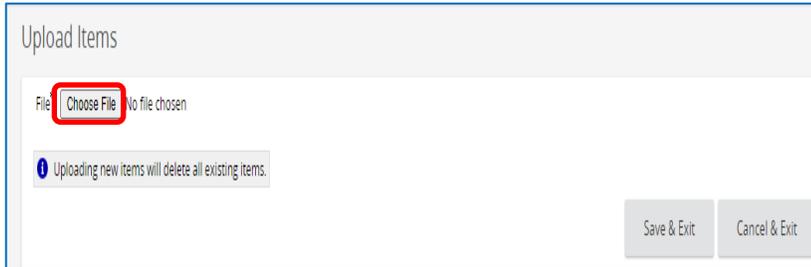
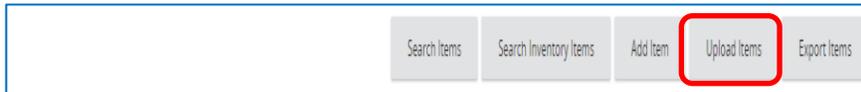
1. Return to the Items tab and click on the **Upload Items** button.
2. Click on the **Choose File** button.

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.



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	200.0	EA	0.00	\$0.00	\$0.00	0.0	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
20	2.0	life ring	500.0	EA	0.00	\$0.00	\$0.00	0.0	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
0485	3.0	pool rope	500.0	EA	0.00	\$0.00	\$0.00	0.0	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
2	4.0	pool alarm	500.0	EA	0.00	\$0.00	\$0.00	0.0	\$0.00	\$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: 2BI - 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: 2BI - In Progress

General | Items | **Address** | Accounting | Routing | Attachments(1) | Notes | **Bidders** | 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
All				
<input type="checkbox"/>	00000204	Alliance Detective & Security Service, Inc.	Bid Mailing Address: Add New Address General Mailing Address - Scott Cummings 930 Broadway Everett, MA...	Email

930 Broadway
Everett, MA 02149
US

Screenshot

Delete All	Question #	Print Sequence	Required	Question	Response Type
<input type="checkbox"/>	0	1.0	<input checked="" 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.



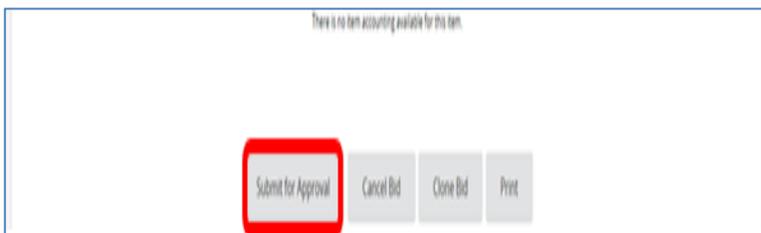
Step 14: Completing the Q&A Tab

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.

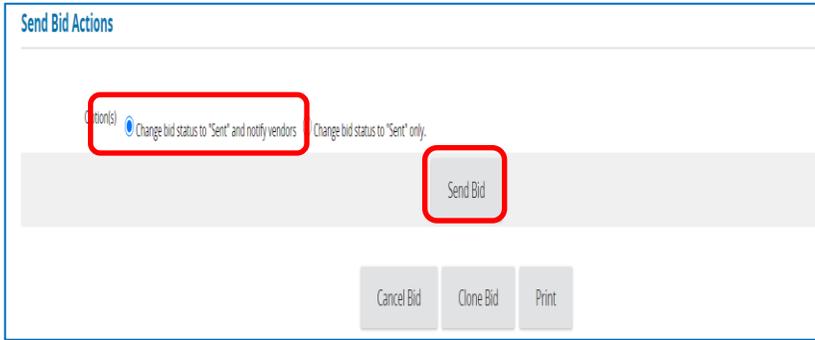
4. Click on the **Save & Continue** button.

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.



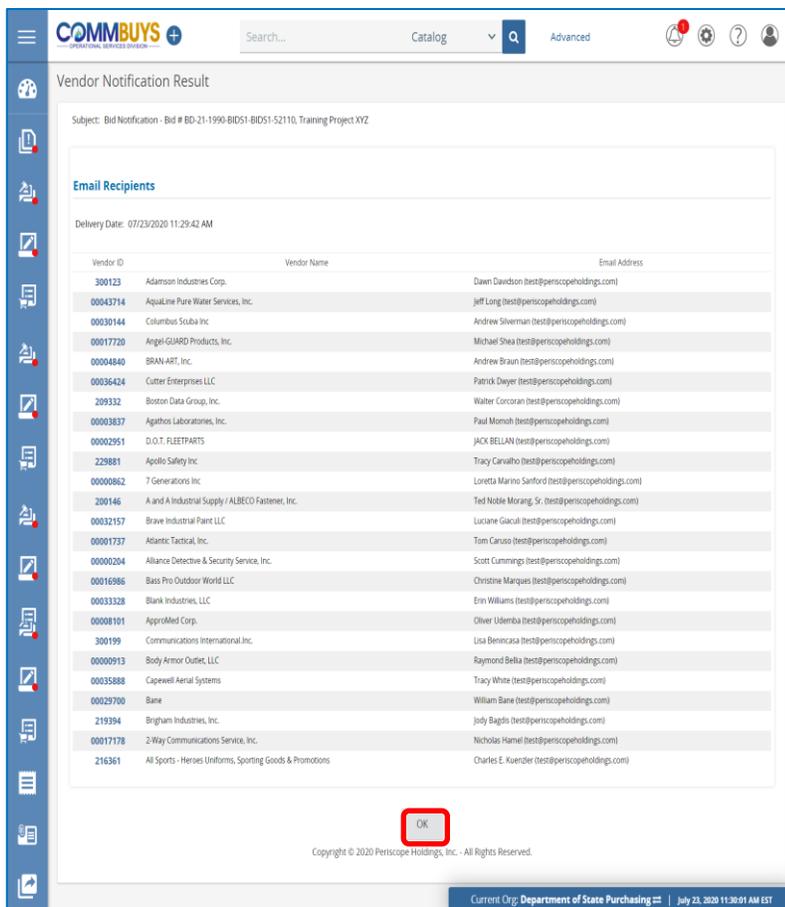
Step 15: Submitting for Approval

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.



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.