

Job Aid:

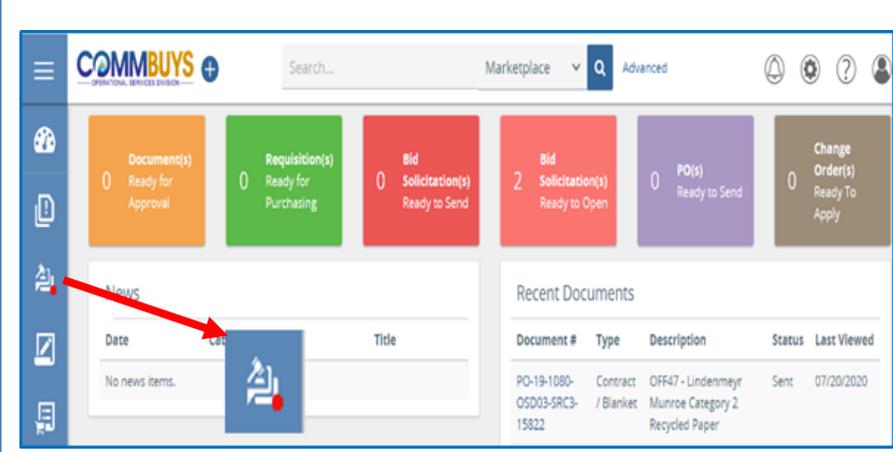
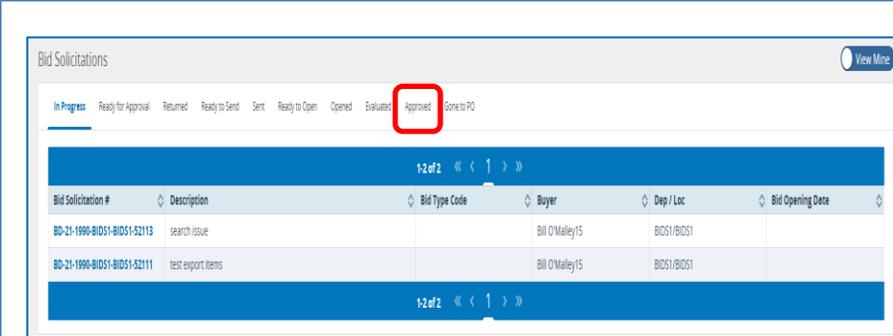
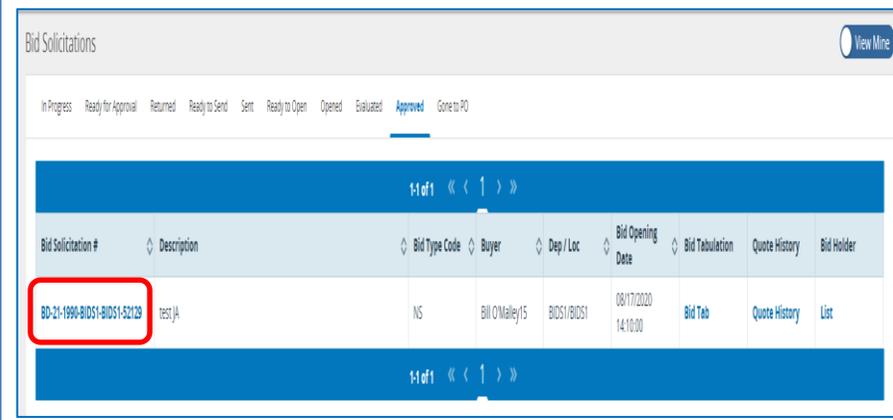
How to Create a Master Blanket Purchase Order (MBPO) from an Awarded Bid

This Job Aid shows how to:

- Find and open an evaluated and awarded COMMBUYS Bid
- Create a Master Blanket Purchase Order (Contract) from an awarded Bid in COMMBUYS

Of Special Note:

Once the solicitation process is complete and the bid is awarded to a vendor(s), an MBPO for a new contract needs to be created in COMMBUYS. This job aid starts at the point where the bid has been awarded and approved.

Screenshot	Directions																		
	<p>Step 1: Searching for Bids</p> <p>From the Main Menu, click on the Bid Solicitations icon.</p>																		
 <table border="1"> <thead> <tr> <th>Bid Solicitation #</th> <th>Description</th> <th>Bid Type Code</th> <th>Buyer</th> <th>Dep / Loc</th> <th>Bid Opening Date</th> </tr> </thead> <tbody> <tr> <td>BD-21-1990-BIDS1-52113</td> <td>search issue</td> <td></td> <td>Bill O'Malley15</td> <td>BIDS1/BIDS1</td> <td></td> </tr> <tr> <td>BD-21-1990-BIDS1-52111</td> <td>test export items</td> <td></td> <td>Bill O'Malley15</td> <td>BIDS1/BIDS1</td> <td></td> </tr> </tbody> </table>	Bid Solicitation #	Description	Bid Type Code	Buyer	Dep / Loc	Bid Opening Date	BD-21-1990-BIDS1-52113	search issue		Bill O'Malley15	BIDS1/BIDS1		BD-21-1990-BIDS1-52111	test export items		Bill O'Malley15	BIDS1/BIDS1		<p>Step 2: Opening an Approved Bid</p> <ol style="list-style-type: none"> 1. Click on the Approved tab.
Bid Solicitation #	Description	Bid Type Code	Buyer	Dep / Loc	Bid Opening Date														
BD-21-1990-BIDS1-52113	search issue		Bill O'Malley15	BIDS1/BIDS1															
BD-21-1990-BIDS1-52111	test export items		Bill O'Malley15	BIDS1/BIDS1															
 <table border="1"> <thead> <tr> <th>Bid Solicitation #</th> <th>Description</th> <th>Bid Type Code</th> <th>Buyer</th> <th>Dep / Loc</th> <th>Bid Opening Date</th> <th>Bid Tabulation</th> <th>Quote History</th> <th>Bid Holder</th> </tr> </thead> <tbody> <tr> <td>BD-21-1990-BIDS1-52129</td> <td>test JA</td> <td>NS</td> <td>Bill O'Malley15</td> <td>BIDS1/BIDS1</td> <td>08/17/2020 14:10:00</td> <td>Bid Tab</td> <td>Quote History</td> <td>List</td> </tr> </tbody> </table>	Bid Solicitation #	Description	Bid Type Code	Buyer	Dep / Loc	Bid Opening Date	Bid Tabulation	Quote History	Bid Holder	BD-21-1990-BIDS1-52129	test JA	NS	Bill O'Malley15	BIDS1/BIDS1	08/17/2020 14:10:00	Bid Tab	Quote History	List	<ol style="list-style-type: none"> 2. Click on the blue hyperlink in the Bid Solicitation # column to open an approved Bid. <p>NOTE: Open Market bids can be changed to MBPOs; however, they are typically used for a one-time bid that will most likely not result in a contract.</p>
Bid Solicitation #	Description	Bid Type Code	Buyer	Dep / Loc	Bid Opening Date	Bid Tabulation	Quote History	Bid Holder											
BD-21-1990-BIDS1-52129	test JA	NS	Bill O'Malley15	BIDS1/BIDS1	08/17/2020 14:10:00	Bid Tab	Quote History	List											

Step 3: Clicking on the Bid Tab Button

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

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

Item Information

Item # 1: placeholder 2BA-Approved

UNSPSC Code: 851546
Water safety

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

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

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

Pre-Bid Approval Path:
 There are no approval paths found for this Bid.

Bid Award Approval Path:
 There are no approval paths found for this Bid.

Bid Tab Cancel Bid Clone Bid View Quote History Print

Step 4: Accessing the Summary Tab

The **Bid Tabulation** page displays all the quotes received for the selected bid.

Click on the **Summary** tab.

Bid Tabulation for Bid #BD-21-1990-BIDS1-BIDS1-52129

Quotes Revisions Items Header Questions Subcontractors Routing Attachments **Summary** Back to Bid

Total Number of Submitted Quotes: 3

Consider All	Quote #	Description	Vendor ID	Vendor Name	Submit Date	Attachments
<input checked="" type="checkbox"/>	QT-1990-BIDS1-BIDS1-78986	tes:JA	00028700	Bere	08/17/2020 12:02:22 PM	Download
<input checked="" type="checkbox"/>	QT-1990-BIDS1-BIDS1-78987	tes:JA	00028710	Deale	08/17/2020 12:03:51 PM	Download
<input checked="" type="checkbox"/>	QT-1990-BIDS1-BIDS1-78988	tes:JA	00028554	Kramerica	08/17/2020 12:05:09 PM	Download

Save And Continue

Bid Tabulation for Bid #BD-21-1990-BIDS1-BIDS1-52129

Quotes Revisions Items Header Questions Subcontractors Routing Attachments Score **Summary** Back to Bid

Bid Award Validation Warnings
There are items that are not awarded.

Bid Tabulation Information

Total Item Count: 1 **Total Awarded Quote Count:** 1 **Bid Status:** 2BA - Bid Approved (Ready for Vendor Awarding)

Canceled	Item info/Quote info	(00029710)Decelle -<Quote: QT-1990-BIDS1-BIDS1-78997>												
	placeholder Item #1 Print Sequence:1.0 Status:2BA - Approved Quantity:1.0 Uom:EA	<table border="0"> <tr><td>Unit Cost</td><td>\$0.00</td></tr> <tr><td>Discount %</td><td>0.0%</td></tr> <tr><td>Tax Rate</td><td>0.0%</td></tr> <tr><td>Freight</td><td>\$0.00</td></tr> <tr><td>Alternate Description</td><td>See Quote Attachment(s)</td></tr> <tr><td>Award</td><td><input type="checkbox"/></td></tr> </table>	Unit Cost	\$0.00	Discount %	0.0%	Tax Rate	0.0%	Freight	\$0.00	Alternate Description	See Quote Attachment(s)	Award	<input type="checkbox"/>
Unit Cost	\$0.00													
Discount %	0.0%													
Tax Rate	0.0%													
Freight	\$0.00													
Alternate Description	See Quote Attachment(s)													
Award	<input type="checkbox"/>													
Totals:														
\$ Vendor Gross Total:	\$0.00													
\$ Vendor Discount:	\$0.00													
\$ Vendor Net Total:	\$0.00													
\$ Preference Discount:	\$0.00													
\$ Evaluation Total:	\$0.00													
\$ Vendor Freight:	\$0.00													
\$ Awarded:	\$0.00													
Eval Codes:														
Pref Codes:														

Evaluation Code Descriptions:
** = Low Item Price

Create PO Export Awarded Items Print

Step 5: Clicking on the Create PO Button

The **Summary** tab for the bid opens. Scroll to the bottom of the page and click on the **Create PO** button.

NOTE: The **Create PO** button will only appear if the bid has been awarded.

NOTE: If you have awarded the contract to multiple vendors, all of the awarded vendors will display on this page.

Bid BD-21-1990-BIDS1-BIDS1-52129 - Purchase Order Creation Preview

1 purchase order will be created for the following quote:

Quote #	Vendor ID	Decelle
QT-1990-BIDS1-BIDS1-78997	00029710	

Purchase order creation options:

- Include Narrative Items
- Include Bid Attachments
- Include Bid Tab Attachments
- Include Bid Notes
- Include Quote Subcontractors
- Include Vendor Quote Attachments
- Include Forms

Click 'Continue' button to create PO or click 'Cancel & Exit' button to cancel the PO creation and return to the bid tabulation summary page.

Continue Cancel & Exit

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Step 6: Previewing the PO Creation Page

The **Purchase Order Creation Preview** page displays with the purchase order creation options already preselected:

- Include Narrative Items
- Include Bid Attachments
- Include Bid Tab Attachments
- Include Bid Notes
- Include Quote Subcontractors
- Include Vendor Quote Attachments
- Include Forms

The best practice is to keep all of these checked.

Click on the **Continue** button to create the MBPO.

Step 7: Opening the PO

The page refreshes with the PO(s) created from the bid, one for each Vendor awarded.

NOTE: If multiple vendors have been awarded with the intention of creating a separate contract for each vendor, the remaining steps in this job aid will need to be completed for each awarded vendor.

Open the PO by clicking on the blue hyperlinked **PO #** next to the words: "New Purchase Order is".

Blanket Bid BD-21-1990-BIDS1-BIDS1-52129

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

System Warning(s)

New Purchase Order is [PO-21-1990-BIDS1-BIDS1-19484 - 0](#)

Header Information

Bid Number:	BD-21-1990-BIDS1-BIDS1-52129	Description:	test JA
Purchaser:	Bill O'Malley15	Minor Status:	
Organization:	Department of State Purchasing		
Fiscal Year:	21	Department:	BIDS1 - Procurement Department
Show On Web:	Yes	Allow Electronic Quote:	Yes
Bid Opening Date:	08/17/2020 02:10:00 PM	Available Date:	08/11/2020 01:35:44 PM
Purge Date:			
Bid Type:	Open Bid	Informal Bid:	No
Control Code:		Estimated Cost:	\$0.00
Alternate ID:		Purchase Method:	Blanket
Blanket/Contract Begin Date:	08/31/2020 12:00:00 AM	Blanket/Contract End Date:	08/31/2021 12:00:00 AM
Info Contact:		Bulletin Desc:	
U N S P S C Code Certified Required:	No	Acknowledge inclusion required:	No
Subcontractor Info:		Quote Notification:	No
Date Last Updated:	08/17/2020 02:06:29 PM	User Last Updated:	Bill O'Malley15
Ship-to Address:	Andy Dwyer 80 West Avenue Boston, MA 02117 US Email: test@periscopeholdings.com Phone: (123)456-7890	Bill-to Address:	Andy Dwyer 80 West Avenue Boston, MA 02117 US Email: test@periscopeholdings.com Phone: (123)456-7890
Solicitation Enabled:	No	Rolling Enrollment Enabled:	
Invoice Method:	Three Way Match	Open Enrollment Enabled:	<input type="checkbox"/>
SBPP (Small Business Purchasing Program) Eligible?:	YES		
See SBPP requirements and exceptions at www.mass.gov/sbpp			

Step 8: Reviewing the General, Items, and Vendor Tabs

The PO opens to the **Summary** tab page. Review the **General**, **Items**, and **Vendor** tabs to ensure accuracy.

The following tab is the **Routing** tab which displays the path this document will follow towards approval. It is not activated until after you submit the document for approval.

Master Blanket Purchase Order PO-21-1990-BIDS1-BIDS1-19484 Status: 3PA - In Progress

General Items Vendor Routing Control Attachments() Notes Change Orders Reminders Summary

Header Information

Purchase Order Number:	PO-21-1990-BIDS1-BIDS1-19484	Release Number:	0	Short Description:	test JA
Status:	3PA - In Progress	Purchaser:	Bill O'Malley15	Receipt Method:	Quantity
Fiscal Year:	2020	PO Type:	Blanket	Minor Status:	
Organization:	Department of State Purchasing	Location:	BIDS1 - Procurement	Type Code:	
Department:	BIDS1 - Procurement Department	Entered Date:	08/17/2020 02:42:21 PM	Control Code:	
Alternate ID:		Retainage %:	0.00%	Discount %:	0.00%
Days ARD:	0	Release Type:	Direct Release, RPA Release Not Allowed	Pcard Enabled:	No
Print Desc Detail:	PDF Offer	Tax Rate:		Actual Cost:	\$0.00
Catalog ID:					
Contact Instructions:					
Print Format:					
Solicitation Enabled:	No				
Special Instructions:					

Step 9: Completing the Control Tab

NOTE: If you wish to have other agencies or organizations use your contract, complete the following steps. Otherwise, skip to Step 10.

1. Click on the **Control** tab.
2. At the top of the page, enter the **Master Blanket/Contract Begin Date and End Date** using the calendar icons if those fields are not already populated.
3. Select the **Cooperative Purchasing Allowed** checkbox.
4. Click on the **magnifying glass icon** in the Organization column next to the **Add New:** field.

5. A Lookup Organization popup screen displays. There are two types of MBPOs in COMMBUYS.

For Limited User / Departmental MBPOs, which will be available for use by the issuing Department and one or more eligible entities either listed specifically in the Request for Response (RFR) or defined generally in the RFR and then subject to authorization by the issuing Department, choose one of the following:

- Complete the Search Fields at the top of the popup page and click on the **Find It** button, or
- Scroll down through the list of Organization Names
- Select the radio button next to the desired organization, then click on the **Select** button at the bottom.

Master Blanket Purchase Order PO-21-1990-BIDS1-BIDS1-19484

General Vendor Routes **Control** Comments(2) Notes Change Orders Reminders Summary

Master Blanket/Contract Begin Date: 10/31/2023 Master Blanket/Contract End Date: 10/31/2024

Cooperative Purchasing Allowed:

Organization	Department	Dollar Limit	Dollars Spent to Date	Minimum Order Amount	Delete All
1990 - Department of State Purchasing	AGI - Agency Umbrella Master Control	0.00	0.00	0.00	<input type="checkbox"/>
1990 - Department of State Purchasing	Add New: <input type="text"/>	0.0	0.00	0.0	

Save & Continue Reset

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Cooperative Purchasing Allowed

Organization

1990 - Department of State Purchasing

Add New:

Lookup Organization

Search Using: ALL of the criteria

Search Fields: Organization ID, Organization Name, Fiscal Year Start, Fiscal Year End, Status

Browse by: 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 0 1 2 3 4 5 6 7 8 9

Find It Clear

1-25 of 1179
1 2 3 4 5 6 7 8 9 10 >

Select	Organization ID	Organization Name
<input type="radio"/>	ALL ORG	Organization Umbrella Master Control
<input type="radio"/>	1002	Dept. of Transitional Assistance - Inactive
<input type="radio"/>	1000	Developmental Disabilities Council
<input type="radio"/>	1001	Attorney General's Office
<input type="radio"/>	1002	Department of Agricultural Resources
<input type="radio"/>	1003	Executive of Administration and Finance
<input type="radio"/>	1004	Appellate Tax Board
<input type="radio"/>	1005	Berkshire Community College
<input type="radio"/>	1006	Bunker Hill Community College
<input type="radio"/>	1007	Board of Library Commissioners
<input type="radio"/>	1008	Bristol District Attorney
<input type="radio"/>	1009	Bureau of the State House
<input type="radio"/>	1010	Bridgewater State University

Select Organizational ID Organization Name
 ALL ORG Organization Umbrella Master Control

- For **Statewide or OSD-Designated Statewide MBPOs** which will be available for use to all eligible entities, select the **radio button** next to ALL ORG, then click on the **Select** button at the bottom.

NOTE: Select ALL ORG **ONLY** if authorized by OSD **AND** within the RFR language.

6. When the screen redisplay, click on the **magnifying glass icon** next to the Add New: field in the Department column.

Master Control Validation Errors
At least one control is required for master blankets/contracts.

Master Blanket/Contract Begin Date: Master Blanket/Contract End Date:

Cooperative Purchasing Allowed

Organization: Department:

Add New: 1020 - Department of Conservation and Recreation

Add New:

i Dollar Limit set to 0 indicates no limit.

7. Select the **radio button** next to the department with whom you would like to share your contract, then click on the **Select** button at the bottom of the page.

NOTE: If you would like to share with all departments within the selected organization, select the radio button next to **AGY Agency Umbrella Master Control**. If you would like to select only certain departments within the selected organization, add them one at a time.

Department Lookup for Organization: Department of Conservation and Recreation

Select	Department ID	Department Name	Organization	Status
<input type="radio"/>	AGY	Agency Umbrella Master Control	ALL ORG	Active
<input type="radio"/>	1020CND	Default Data Conversion Department	1020 - Department of Conservation and Recreation	Active
<input type="radio"/>	DCRAF	DCR Admin & Finance	1020 - Department of Conservation and Recreation	Active
<input type="radio"/>	DCRAL	DCR Asian Longhorn Beetle	1020 - Department of Conservation and Recreation	Active
<input type="radio"/>	DCRAP	DCR Approval	1020 - Department of Conservation and Recreation	Inactive
<input type="radio"/>	DCRBR	DCR Boston Regional Office	1020 - Department of Conservation and Recreation	Active
<input type="radio"/>	DCRCR	DCR Central Regional Office	1020 - Department of Conservation and Recreation	Active
<input type="radio"/>	DCRCU	DCR CONTRACTS UNIT	1020 - Department of Conservation and Recreation	Active
<input type="radio"/>	DCRCF	DCR Forest Fire Control	1020 - Department of Conservation and Recreation	Active
<input type="radio"/>	DCRFL	DCR Fleet	1020 - Department of Conservation and Recreation	Active
<input type="radio"/>	DCRFS	DCR Forestry (STP)	1020 - Department of Conservation and Recreation	Active
<input type="radio"/>	DCRGC	DCR GOLF COURSES	1020 - Department of Conservation and Recreation	Active
<input type="radio"/>	DCRS	DCR Interpretive Services	1020 - Department of Conservation and Recreation	Active
<input type="radio"/>	DCRL	DCR (LSD) MARTIN GOLF COURSE	1020 - Department of Conservation and Recreation	Deleted
<input type="radio"/>	DCRMV	DCR Mobile Maintenance	1020 - Department of Conservation and Recreation	Active
<input type="radio"/>	DCRNP	DCR WAGS PARKS	1020 - Department of Conservation and Recreation	Inactive
<input type="radio"/>	DCNR	DCR North Regional Office	1020 - Department of Conservation and Recreation	Active
<input type="radio"/>	DCRPE	DCR Planning & Engineering	1020 - Department of Conservation and Recreation	Active
<input type="radio"/>	DCRPO	DCR Park Operations	1020 - Department of Conservation and Recreation	Active
<input type="radio"/>	DCRRE	DCR Recreation	1020 - Department of Conservation and Recreation	Active
<input type="radio"/>	DCRRG	DCR Rangos	1020 - Department of Conservation and Recreation	Active
<input type="radio"/>	DCRSR	DCR South Regional Office	1020 - Department of Conservation and Recreation	Active
<input type="radio"/>	DCRLA	Universal Access Program	1020 - Department of Conservation and Recreation	Active
<input type="radio"/>	DCRWQ	DCR Waquoit	1020 - Department of Conservation and Recreation	Active
<input type="radio"/>	DCRWR	DCR West Regional Office	1020 - Department of Conservation and Recreation	Active
<input type="radio"/>	DCRWS	DCR Water Supply	1020 - Department of Conservation and Recreation	Active

Screenshot

Directions

The screenshot shows a form with two rows of organization and department data. The first row is for '1990 - Department of State Purchasing' and 'AGI - Agency Umbrella/Master Control'. The second row is for '1020 - Department of Conservation and Recreation' and '1020CONVID - Default/State Conversion Department'. To the right of these rows is a table with three columns: 'Dollar Limit', 'Dollars Spent to Date', and 'Minimum Order Amount'. The 'Dollar Limit' and 'Minimum Order Amount' fields are highlighted with a red box. Below the table, there is a 'Save & Continue' button, also highlighted with a red box, and a 'Reset' button.

Organization	Department	Dollar Limit	Dollars Spent to Date	Minimum Order Amount
1990 - Department of State Purchasing	AGI - Agency Umbrella/Master Control	0.00	\$0.00	0.00
1020 - Department of Conservation and Recreation	1020CONVID - Default/State Conversion Department	0.00	\$0.00	0.00

Dollar Limit set to 0 indicates no limit.

Save & Continue Reset

8. If you choose to limit the amount of dollars each organization may spend on the MBPO, enter an amount in the **Dollar Limit** field. Also, if you would like to establish a minimum dollar amount per order, enter an amount in the **Minimum Order Amount** field. A dollar limit set to zero indicates no limit.
9. Click on the **Save & Continue** button.

The screenshot shows the 'Master Blanket Purchase Order PO-21-1990-BIDS1-BIDS1-19484' form. The 'Summary' tab is highlighted with a red box. Below the tabs is the 'Header Information' section, which contains various fields and their values.

Purchase Order Number:		Release Number:		Short Description:	
PO 21-1990-BIDS1-BIDS1-19484		0		test JA	
Status:		Purchaser:		Receipt Method:	
SP - In Progress		BI (1)Maly(S		Quantity	
Fiscal Year:		PO Type:		Minor Status:	
2021		Blanket			
Organization:		Location:		Type Code:	
Department of State Purchasing		BIDS1 - Procurement			
Department:		Entered Date:		Control Code:	
BIDS1 - Procurement Department		08/17/2020 02:48:21 PM			
Alternate ID:		Retainage %:		Discount %:	
		0.00%		0.00%	
Days ARO:		Release Type:		Pcard Enabled:	
0		Direct Release - RPA Release Not Allowed		No	
Print Desc Detail:		Tax Rate:		Actual Cost:	
If Different				\$0.00	
Catalog ID:					
Contact Instructions:					
Print Format:					
Solicitation Enabled:					
No					
Special Instructions:					

Step 10: Reviewing the Remaining Tabs

1. Review the **Attachments, Notes, Change Orders, Reminders, and Summary** tabs for completeness and accuracy.

Submit for Approval

Step 11: Submitting for Approval

After clicking on the **Summary** tab, the PO is currently in an 'In Progress' status.

Scroll to the bottom of the page and click on the **Submit for Approval** button. Your submittal request will go through your established approval process.

The screenshot shows the COMMBUYS home page. At the top, there is a search bar with a dropdown menu set to 'Catalog' and a search button labeled 'Advanced'. Below the search bar, there are several status indicators: '0 Documents(s) Ready for Approval', '0 Requisition(s) Ready for Purchasing', '1 Bid Solicitation(s) Ready to Send', '2 Bid Solicitation(s) Ready to Open', '0 PO(s) Ready to Send', and '0 Change Order(s) Ready to Apply'. The 'Recent Documents' table is as follows:

Document #	Type	Description	Status	Last Viewed
PO-21-1990-BIDS1-BIDS1-19484	Contract / Blanket	test JA	Ready to Send	08/25/2020
BO-21-1990-BIDS1-BIDS1-52129	Bid	test JA	Bid to PO	08/24/2020
BO-21-1990-BIDS1-BIDS1-52115	Bid	scratch bid	Ready to Send	08/14/2020
PO-21-1990-BIDS1-BIDS1-19482	Contract / Blanket	water safety program_pm_08_13_20	Sent	08/13/2020
BO-21-1990-BIDS1-BIDS1-52130	Bid	water safety program_pm_08_13_20	Bid to PO	08/13/2020

Step 13: Opening the PO

Once the PO has been approved, it is ready to be sent to the vendor(s).

Click on the blue hyperlink for the purchase order # in the **Recent Documents** box to open the PO, or use the **Advanced** search function on the COMMBUYS home page to search for the MBPO.

The screenshot shows the 'Vendor Notification Actions' section. It contains two radio buttons: 'Send Email and Notify Vendor' (which is selected) and 'Set to Printed Status'. Below these options is a 'Save & Continue' button. At the bottom of the page, there are buttons for 'Cancel PO', 'Clone PO', 'Print', and 'Print Vendor Copy'.

Step 14: Sending the PO

- The PO opens to the Summary tab with a status of Ready to Send. Scroll to the bottom of the page.
- Select one of the two options:
 - Send Email and Notify Vendor:** This is the default and the best practice. This choice sends the vendor's COMMBUYS contact an email about the PO and the PO can be found in COMMBUYS.
 - Set to Printed Status:** For this choice no email is sent but the Vendor will be able to find and open the PO in COMMBUYS.

Click on the **Save & Continue** button to and the transaction status will change to 'Sent'.