Job Aid:

How to Create a Master Blanket Purchase Order (MBPO) from Scratch

This Job Aid shows a Basic Purchasing user how to:

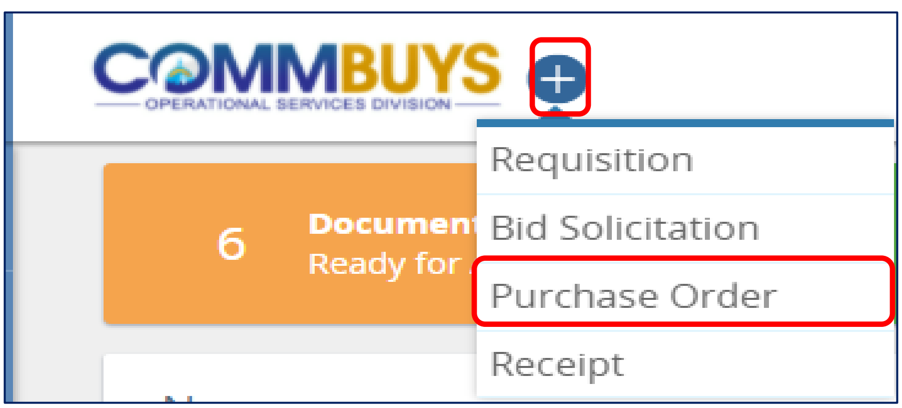
- Create a Master Blanket Purchase Order
- Submit a purchase order (PO) for approval and/or send PO to vendor

Of Special Note:

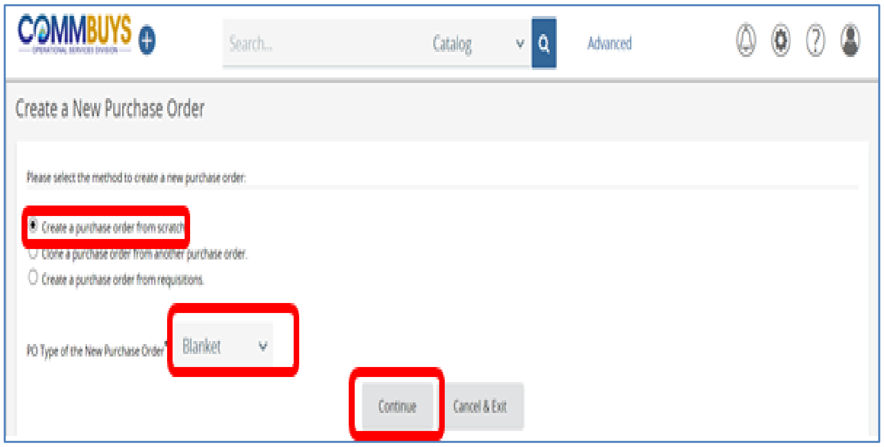
You must be a Basic Purchasing user with appropriate privileges to the organization that owns the migrated document to perform most of the steps outlined below. This Job Aid will focus on:

1. **Master Blankets with one vendor** (awarded contractor) and a catalog of line items specific to that vendor. These blankets, often referred to as "**single vendor based**," are ideal for contracts where pricing is fixed and does not require a quote, however these blankets can be "Solicitation Enabled" in order to support issuing bids to get price quotes when desired. This setup requires you to create a separate Master Blanket for each awarded contractor.

2. **Master Blankets with multiple vendors** listed as distributors who fall under one placeholder vendor. These blankets, often referred to as "**multi-vendor based**," can be "Solicitation Enabled" in order to support issuing Bids to get price quotes from the contractors, and then placing orders with the quote winner(s). This setup requires you to create one Master Blanket that would contain all the awarded contractors.

Screenshot	Directions
	**Step 1: Selecting Contract** 1. Click on the **Add Documents** (plus sign) icon. 2. Select **Purchase Order** from the dropdown menu.

Screenshot	Directions

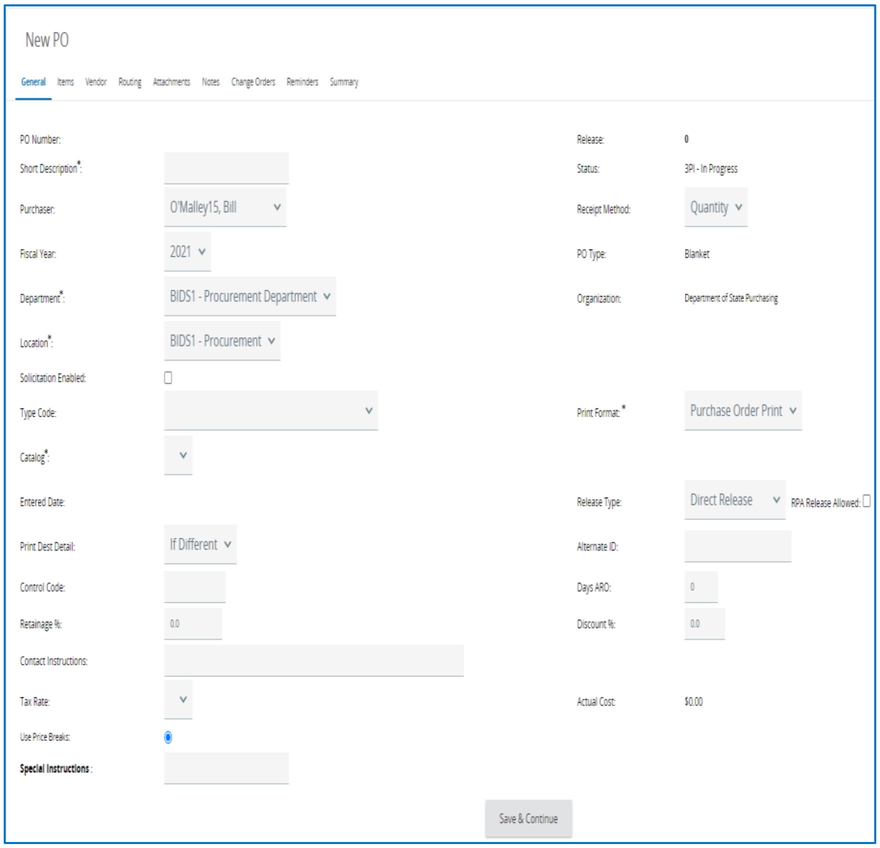


Step 2: Creating a New PO From Scratch

1. From the Create a New Purchase Order screen, ensure that the first radio button: **Create a purchase order from scratch** is selected.

2. **Select Blanket** from the dropdown menu in the PO Type of the New Purchase Order field.

3. Click on the **Continue** button.



Step 3: Completing the New PO General Tab Screen

The New PO screen opens to the General tab. All fields marked with an asterisk are required. Fields to be populated include:

- **Short Description:** Use this field to enter your organization's contract numbering information, as well as a few key words for easy searching.
- **Department**: This defaults from the user profile. It may be changed using the dropdown arrow if other departments are available to the user.
- **Location**: This defaults from the user profile. It may be changed using the dropdown arrow if other locations are available to the user.
- **Solicitation Enabled**: Select this checkbox if your intent is to allow bids to be issued to obtain price quotes when desired.
- **Type Code:** Select from the dropdown menu:
  - **CH –** Historical Contract (do not use)
  - **NC –** Non-Statewide/Limited User Contract
  - **SW –** Statewide Contract

NOTE: Statewide contracts are resrved for OSD or OSD designated agencies.

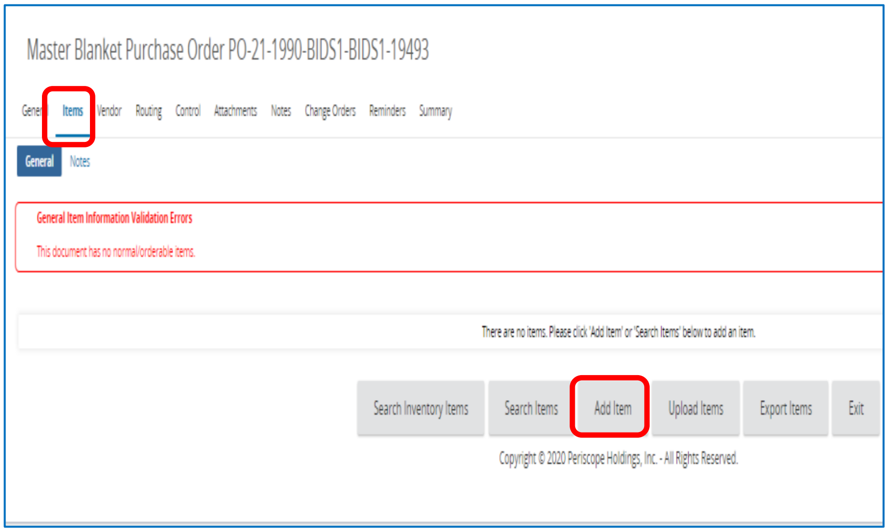
- **Catalog:** Field is not used.
- **Print Format:**
  - **Purchase Order Print** (use this default)
  - **PO Vendor Print**

Optional Fields include:

- **Release Type:**
  - **Direct Release:** A single vendor blanket with specific pricing. Select if you would like the PO to be ready to send to the vendor once the requisition is approved.

Screenshot	Directions
	Standard Release: Used for any blanket with or without pricing. Select if you would like the PO to require a second approval. **RPA Only Release:** To be used only for situations that require the immediate acquisition of a commodity or service. **Alternate ID:** Enter information as required. This may include (but not limited to) data such as Massachusetts Management Accounting and Reporting System (MMARS) encumbrance ID or Enterprise Resource Planning (ERP)/Accounting system transaction numbers for non-MMARS users. **Special Instructions**: Enter information as required. This field allows for entry of specific instruction to vendors. When fields are complete, scroll to the bottom of the screen and click on the **Save & Continue** button and an auto-generated MBPO number will display at the top of the page.

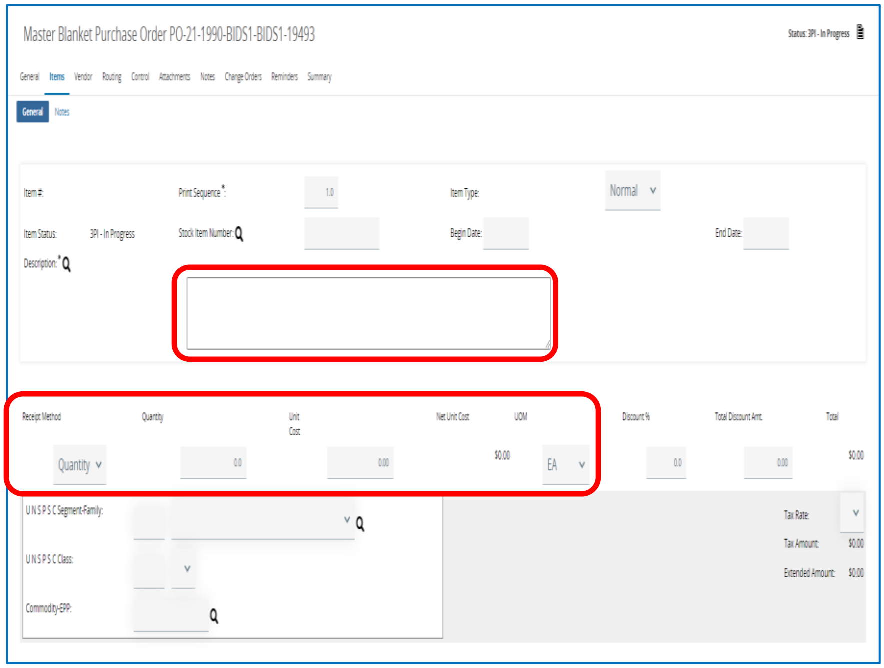
Screenshot	Directions



Step 4: Opening the Items Tab

1. Click on the **Items** tab.
2. Click on the **Add Item** button. Ignore the red validation error as the next few steps demonstrate how to add an orderable item.

Screenshot	Directions



Step 5: Adding Items

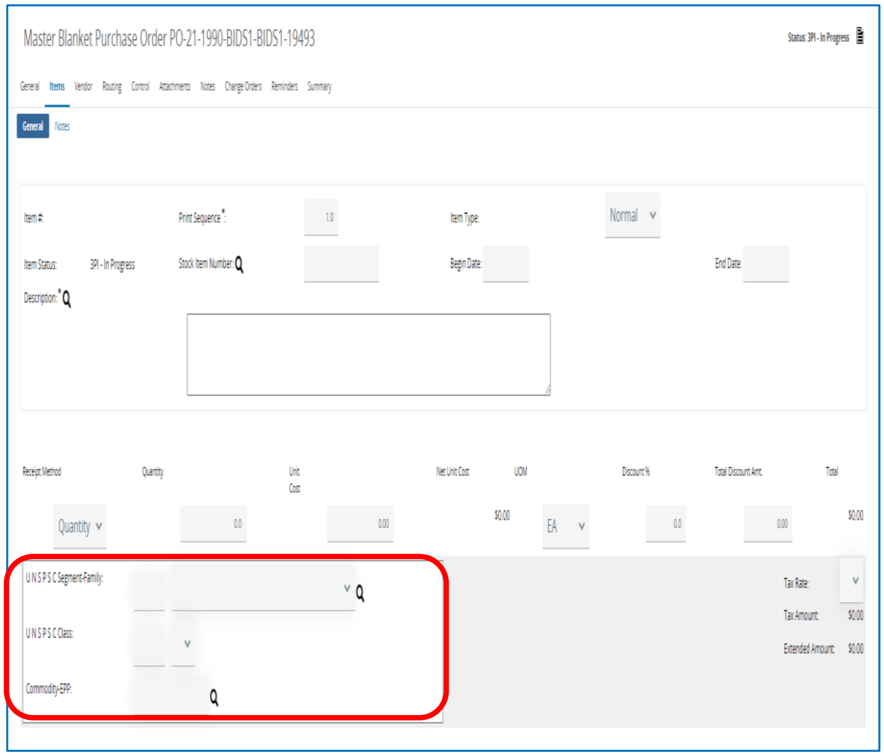
The Items General Tab allows you to enter:

- **Description**: good/service description; up to 400 characters
- **Receipt method:** quantity or dollars; choose based on receiving needs for the blanket
- **Quantity:** (at least 1) make sure it is relevant to the receipt method
- **Unit cost**: cost associated with the item/service per unit (can leave at 0 to allow buyer to enter information)
- **UOM (Unit of Measure):** choose from the dropdown arrow.

If this is a multi-vendor blanket, the description should be specific enough to determine what the purchaser is requesting the vendor to provide a quote for. It is recommended that you indicate that users should create a Solicitation Enabled requisition when ordering this item.

In a single vendor PO, the item section defines specific products or services, their UNSPSC codes, and pricing information. If pricing varies based on an item attribute, create separate items with distinct pricing.

If you need users to be able to enter quoted prices, leave the price blank and instruct them to enter pricing and edit or add to the description on their release requisitions so that the vendor knows what buyers are ordering.



Step 6: Adding UNSPSC Codes

UNSPSC stands for United Nations Standard Products and Services Code. This commodity code will be used to identify vendors who have registered in COMMBUYS using the code(s) you enter.

1. Click on the dropdown arrow next to the **UNSPSC Segment-Family** field. The dropdown menu will display the list of UNSPSC Segment and Family codes. These codes will display with two numeric characters followed by a dash followed by two additional numeric characters.
2. From the dropdown menu, click on the desired code and the number will be entered in the UNSPSC Segment-Family field.
3. Click on the dropdown arrow next to the **UNSPSC Class** field and select the desired two-character code.

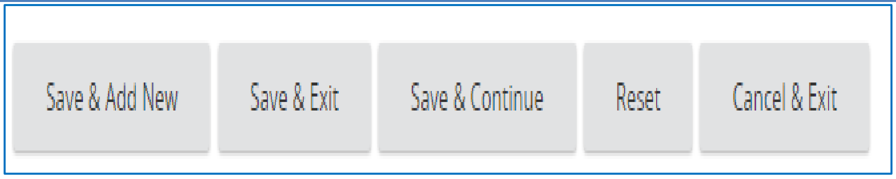
NOTE: If the UNSPSC Segment-Family and/or Class fields are known, they can be entered directly into the fields. If unknown, click on the magnifying glass icon, enter a keyword in the **UNSPSC Keyword** field and click on the **Search** button.

NOTE: UNSPSCs can also be found using the dropdown menus next to each field, by using the UNSPSC Lookup Tool on the COMMBUYS Landing Page, or by going to unspsc.org.

4. Click on the magnifying glass icon next to the **Commodity-EPP:** field. If codes are available, they will display. If available, click on the desired code, then click on the **Find It** button. Scroll to the bottom of the popup screen, select the radio button next to the desired code, and click the **Select** button.

   NOTE: If applicable, freight charges may be entered on the right-hand section of the middle portion of the screen if desired.

Screenshot	Directions

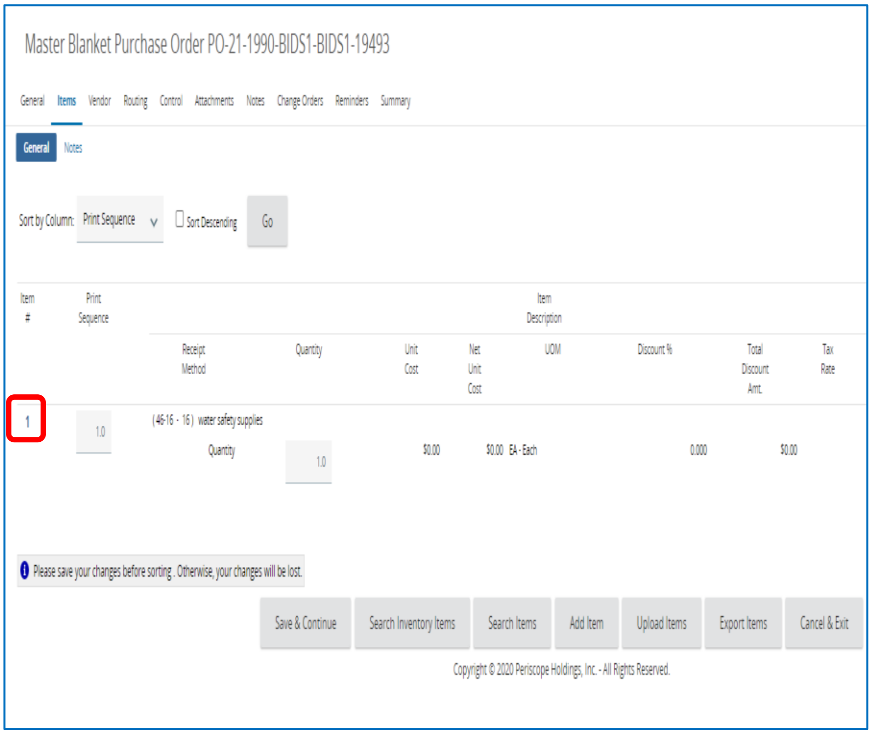


Step 7: Saving the Items

1. After each item is added to the MBPO, scroll to the bottom of the page to click on the best option. There are five button options:
   - **Save & Add New** – This button saves the item to the MBPO and opens a new item entry so that additional items can be added.
   - **Save & Exit** – This button saves the item, closes the item entry page, and returns to the Items tab (general sub tab).
   - **Save & Continue** – This button saves the item and remains on the item entry page.
   - **Reset** – This button removes the item from the PO without saving it.
   - **Cancel & Exit** – This button cancels the item and exits from the item entry page.

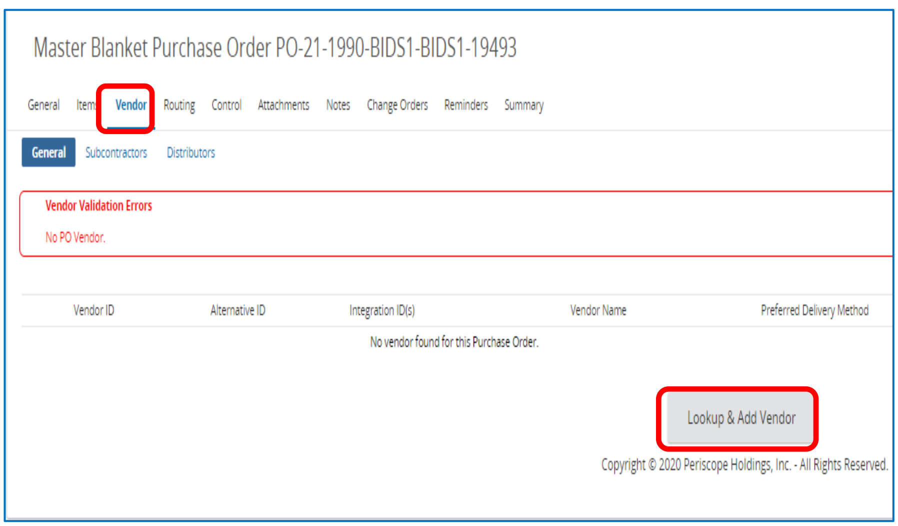
Repeat Steps 5 through 7 until the item entry is complete then click on the **Save & Exit** button.

Screenshot	Directions



Step 8: Reviewing the Items Tab

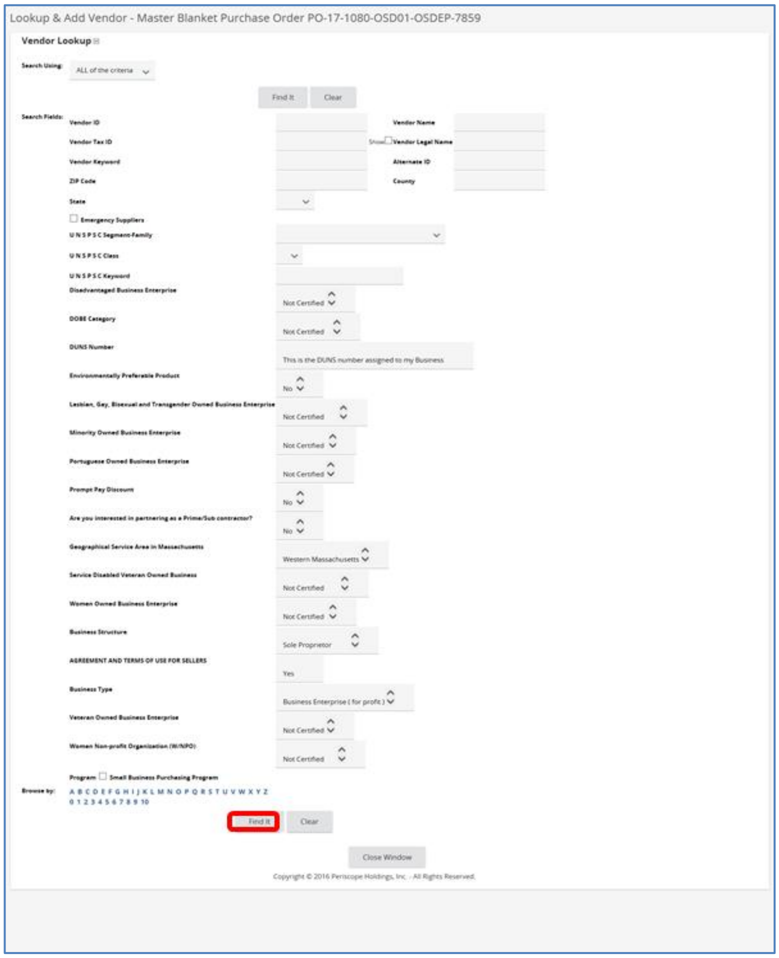
To edit an item you have already entered, click on the **blue hyperlinked number** in the Item # column.



Step 9: Looking Up Vendors

1. Click on the **Vendor** tab.
2. Click on the **Lookup & Add Vendor** button.

Screenshot	Directions



Step 10: Entering Vendor Search Criteria

1. Enter your vendor search criteria if a single vendor is associated with this MBPO.

   If there are multiple vendors associated with this MBPO, select the Conversion Vendor (COMMBUYS Vendor ID 99000000) here. The Conversion Vendor acts as an overall placeholder for the contract and allows you to enter all the awarded contractors as distributors.

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

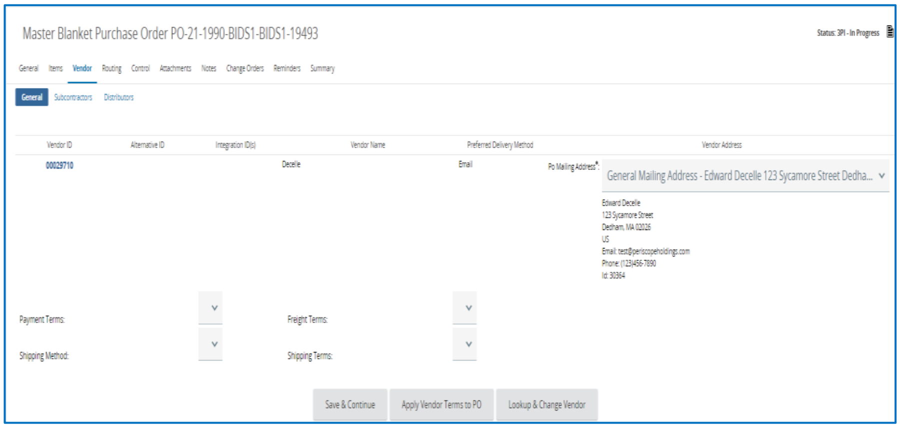
Step 11: Selecting the Vendor

1. Select the radio button for the desired Vendor (either one single vendor or Conversion Vendor for a multi-vendor contract).

2. Click on the **Add Vendor** button.

NOTE: If you do not see the vendor you are looking for, try searching again or contact the vendor to see whether they are registered. The vendor must register with COMMBUYS in order to be added to an MBPO.

Screenshot	Directions

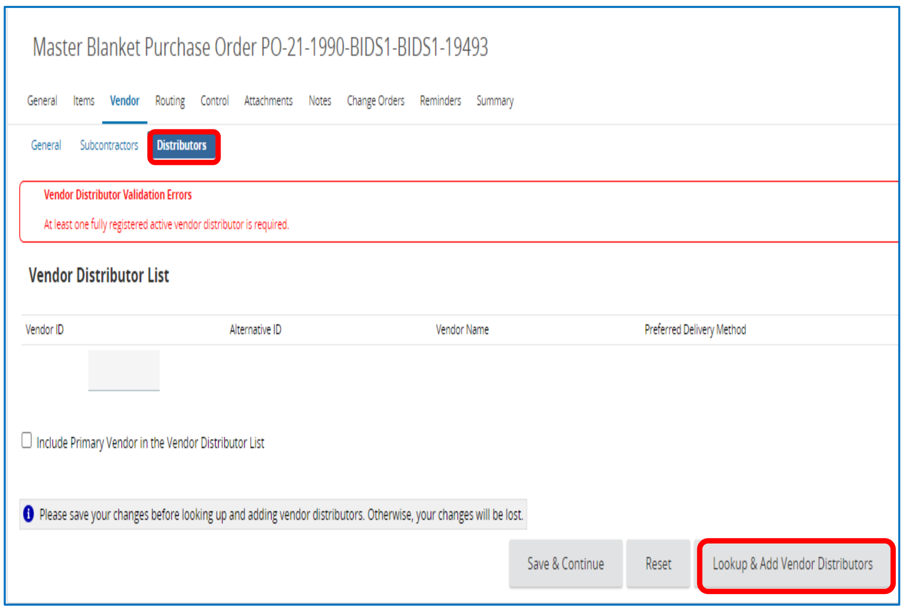


Step 12: Viewing the Vendor Information

The vendor information now displays on the Vendor tab.

Skip to Step 15 if you have selected a single-vendor MBPO.

If you selected Conversion Vendor for a multi-vendor MBPO, go to Step 13.



Step 13: Searching for Multi-Vendors

1. If you selected Conversion Vendor for a multi-vendor MBPO, click on the **Distributors** sub tab.

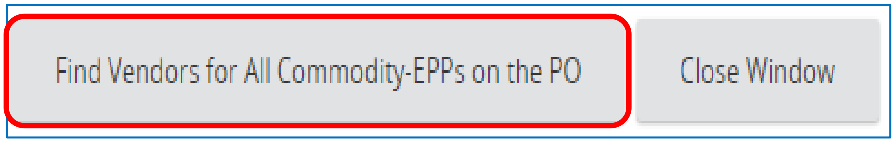
2. Click on the **Lookup & Add Vendor Distributors** button.

Screenshot	Directions

Step 14: Selecting Multi-Vendors

Another Lookup & Add Vendors page displays.

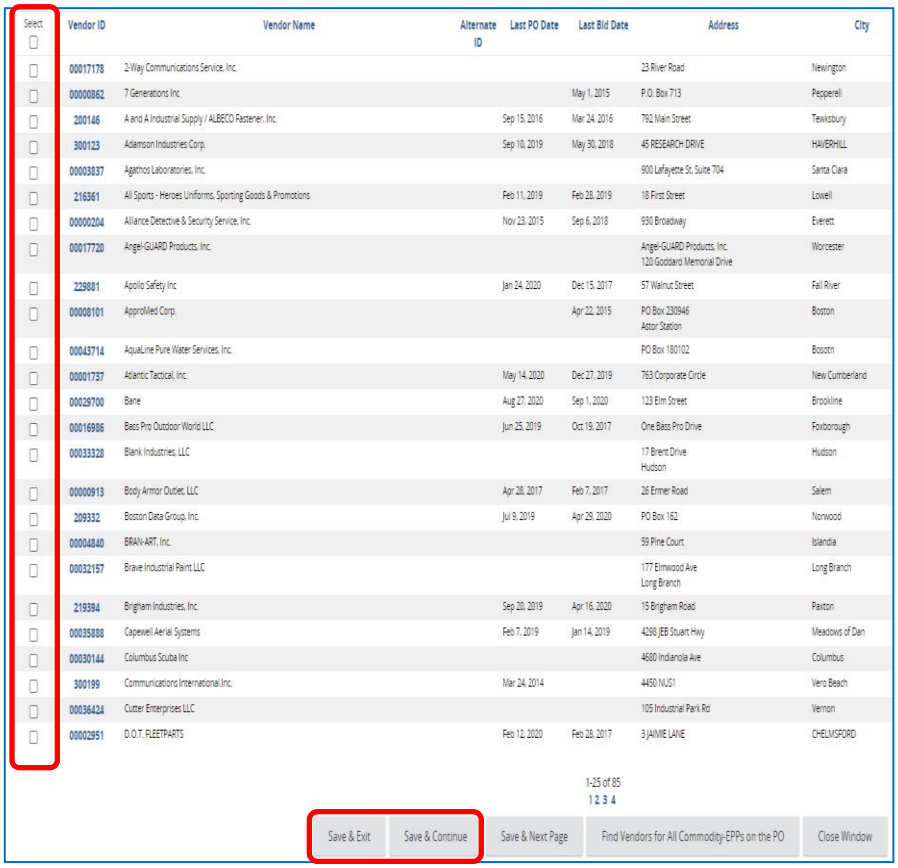
1. Search for all the Vendors on the contract by clicking on the **Find Vendors for All Commodity-EPPs on the PO** button at the bottom of the page.



2. Check the box next to the desired vendor's name in the **Select** column. You will need to do this process one vendor at a time.

3. For each vendor added, click on the **Save & Continue** button.

When finished adding vendors, click on the **Save & Exit** button.



Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date	Address	City
	00017178	2-Way Communications Service, Inc.				23 River Road	Newington
	00000862	7 Generations Inc			May 1, 2015	P.O. Box 713	Pepperell
	200146	A and A Industrial Supply / ALBECO Fastener, Inc.		Sep 15, 2016	Mar 24, 2016	792 Main Street	Tewksbury
	300123	Adamson Industries Corp.		Sep 10, 2019	May 30, 2018	45 RESEARCH DRIVE	HAVERHILL
	00003837	Agathos Laboratories, Inc.				900 Lafayette St, Suite 704	Santa Clara
	216361	All Sports - Heroes Uniforms, Sporting Goods & Promotions		Feb 11, 2019	Feb 28, 2019	18 First Street	Lowell
	00000204	Alliance Detective & Security Service, Inc.		Nov 23, 2015	Sep 6, 2018	930 Broadway	Everett
	00017720	Angel-GUARD Products, Inc.				Angel-GUARD Products, Inc. 120 Goddard Memorial Drive	Worcester
	229881	Apollo Safety Inc		Jan 24, 2020	Dec 15, 2017	57 Walnut Street	Fall River
	00008101	ApproMed Corp.			Apr 22, 2015	PO Box 230946 Astor Station	Boston
	00043714	AquaLine Pure Water Services, Inc.				PO Box 180102	Bosotn
	00001737	Atlantic Tactical, Inc.		May 14, 2020	Dec 27, 2019	763 Corporate Circle	New Cumberland
	00029700	Bane		Aug 27, 2020	Sep 1, 2020	123 Elm Street	Brookline
	00016986	Bass Pro Outdoor World LLC		Jun 25, 2019	Oct 19, 2017	One Bass Pro Drive	Foxborough
	00033328	Blank Industries, LLC				17 Brent Drive Hudson	Hudson
	00000913	Body Armor Outlet, LLC		Apr 28, 2017	Feb 7, 2017	26 Ermer Road	Salem
	209332	Boston Data Group, Inc.		Jul 9, 2019	Apr 29, 2020	PO Box 162	Norwood
	00004840	BRAN-ART, Inc.				59 Pine Court	Islandia
	00032157	Brave Industrial Paint LLC				177 Elmwood Ave Long Branch	Long Branch
	219394	Brigham Industries, Inc.		Sep 20, 2019	Apr 16, 2020	15 Brigham Road	Paxton
	00035888	Capewell Aerial Systems		Feb 7, 2019	Jan 14, 2019	4298 JEB Stuart Hwy	Meadows of Dan
	00030144	Columbus Scuba Inc				4680 Indianola Ave	Columbus
	300199	Communications International.Inc.		Mar 24, 2014		4450 NUS1	Vero Beach
	00036424	Cutter Enterprises LLC				105 Industrial Park Rd	Vernon
	00002951	D.O.T. FLEETPARTS		Feb 12, 2020	Feb 28, 2017	3 JAIMIE LANE	CHELMSFORD

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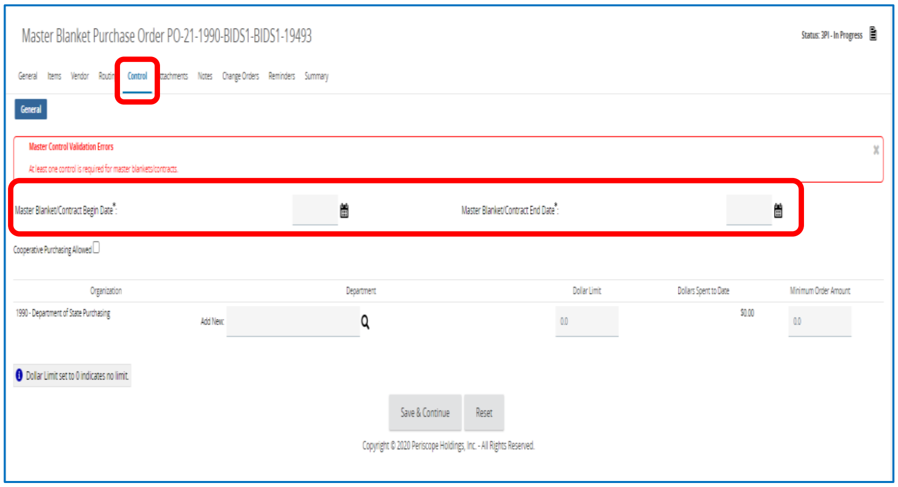
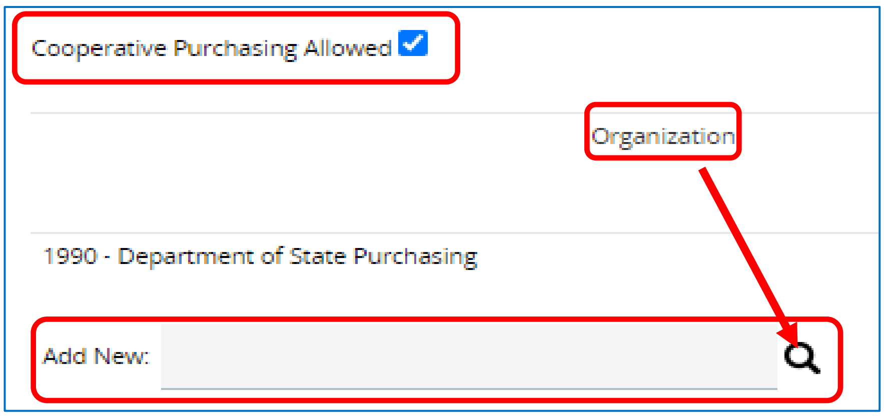
Step 15: Completing the Control Tab

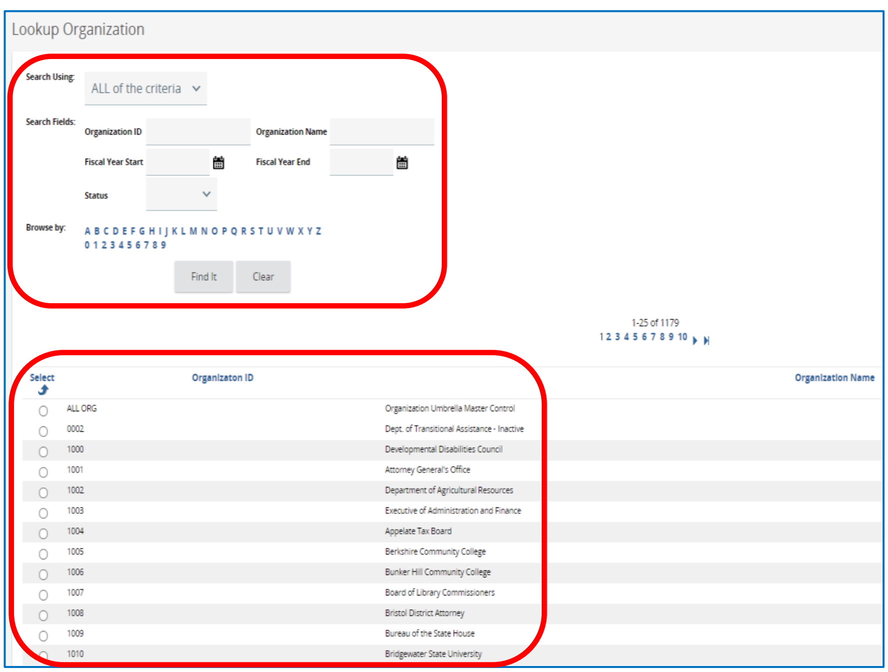


1. Click on the **Control** tab.
2. At the top of the page, enter the **Master Blanket/Contract Begin Date and End Date** using the calendar icons.



NOTE: If you want to have other organizations use your contract, complete 3-5 below. Otherwise skip down to 6.

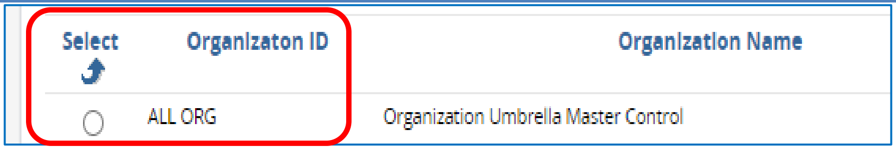
3. Select the **Cooperative Purchasing Allowed** checkbox.
4. Click on the **magnifying glass icon** in the Organization column next to the **Add New:** field.



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

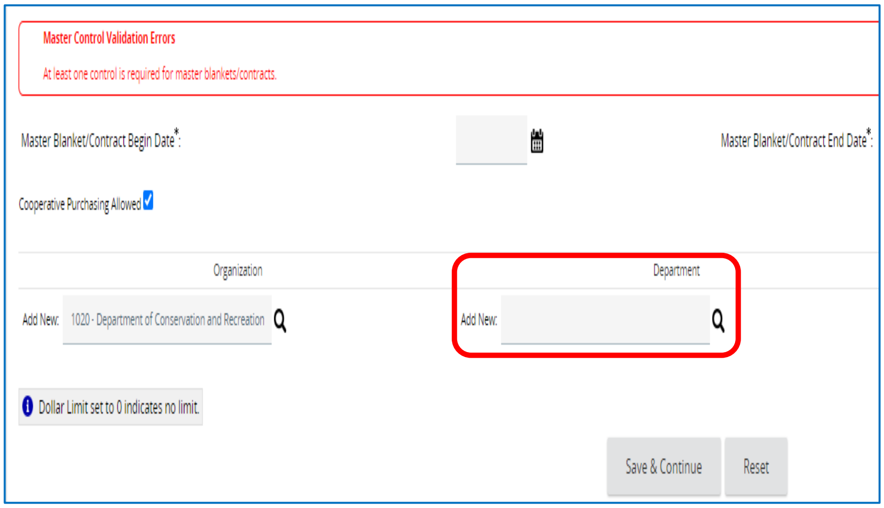
For Limited User / Departmental MBPOs, which will be available for use by the issuing Department and one or more eligible entities either listed specifically in the Request for Response (RFR) or defined generally in the RFR and then subject to authorization by the issuing Department, choose one of the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

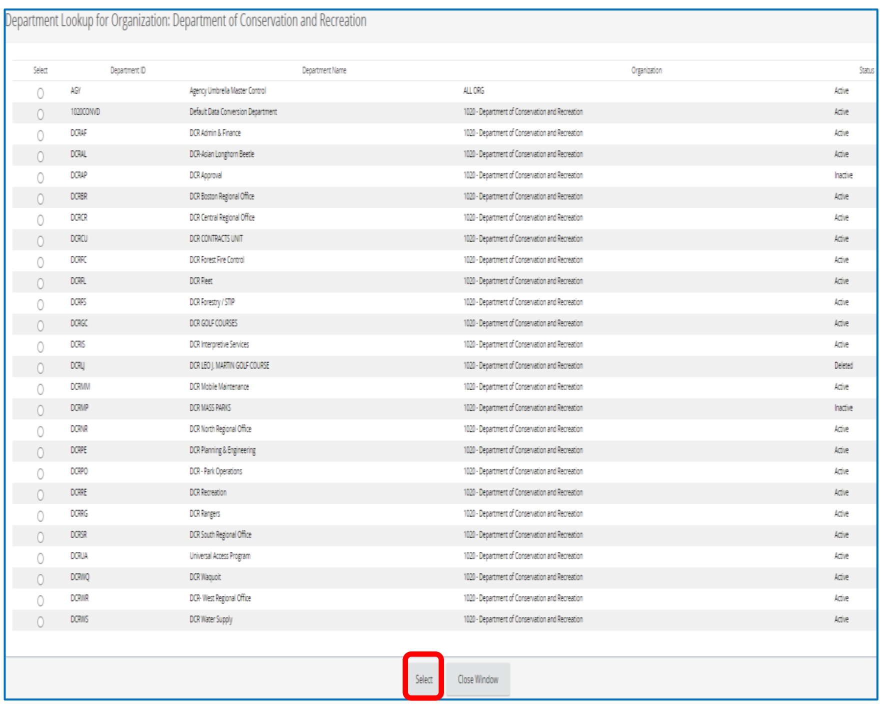


- **For Statewide or OSD-Designated Statewide MBPOs** which will be available for use to all eligible entities, select the **radio button** next to ALL ORG, then click on the **Select** button at the bottom.

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

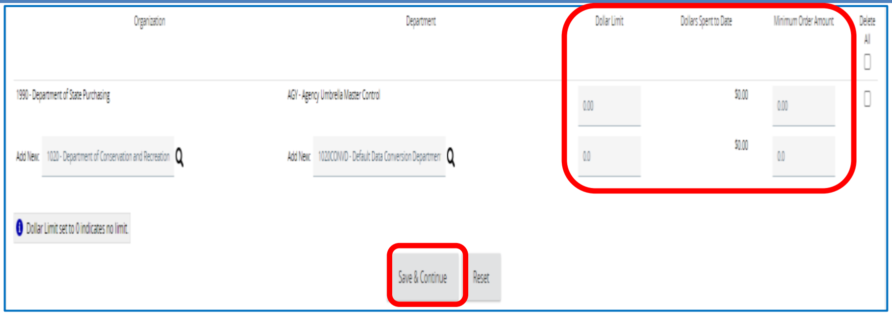
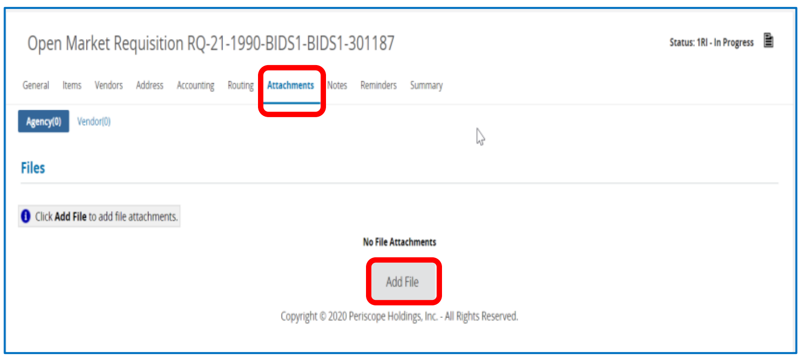


6. When the screen displays, click on the **magnifying glass icon** next to the Add New: field in the Department column.

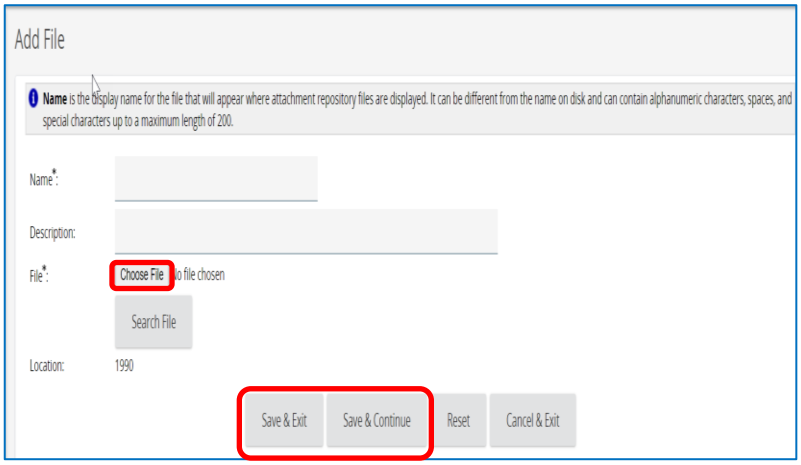


7. Select the **radio button** next to the department with whom you would like to share your contract, then click on the **Select** button at the bottom of the page.

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.

Screenshot	Directions
	8. If you choose to limit the amount of dollars each organization or department 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.
	**Step 16: Viewing the Attachments Tab** 1. Click on the **Attachments** tab. If no attachments are needed, go to Step 19. 2. If any files auto-attach: review, keep, or delete as necessary. To add attachments such as a bid solicitation (e.g. RFR) and required forms or contract documents, click on the **Add File** button.

Screenshot	Directions



Step 17: Adding a File

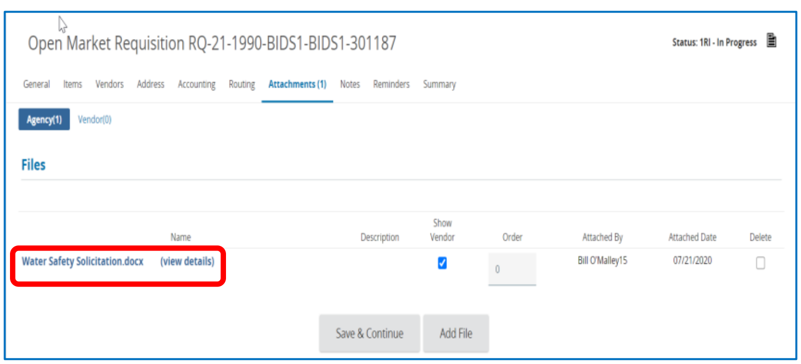
1. The **Add File** window opens. To select a file from your desktop, click the **Browse** or **Choose File** button (depending on your browser). This will search for documents from your computer.

2. Select the desired file from its location (C: drive, shared drive, flash drive, documents folder, desktop, etc.).

3. Complete the following fields
   - **Name** – required; but will be populated with the selected file name if left blank
   - **Description** – optional

4. Click on the **Save & Continue** button to add another file or click on the **Save & Exit** button when all files have been added.

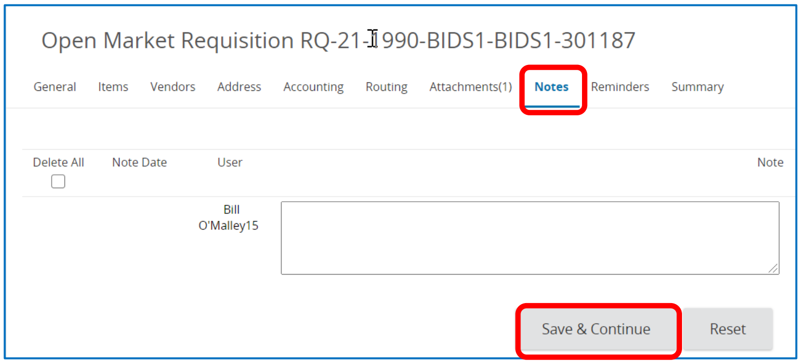
NOTE: Files previously uploaded or added to the Document Library in COMMBUYS are available in the Attachment Repository. To locate and attach from the repository, click on the **Search File** button and complete the advanced search criteria.



Step 18: Verifying the Attachment

The **Attachments** tab redisplays with a list of attached files and the **Show Vendor checkbox** is automatically selected.

Screenshot	Directions



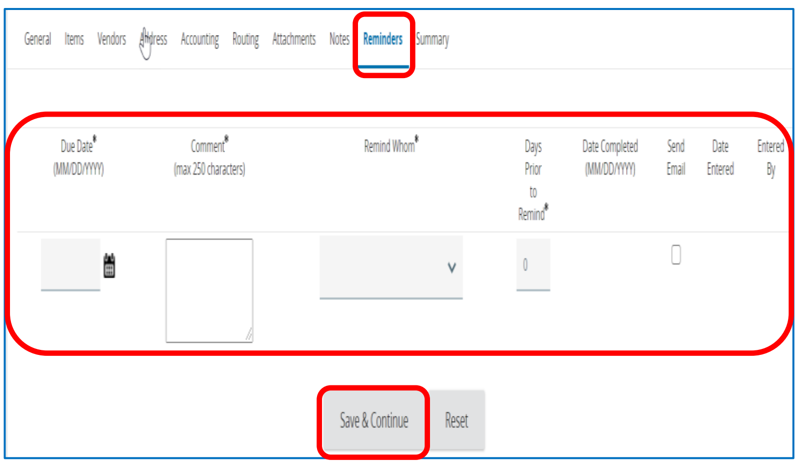
Step 19: Adding Notes

1. Click on the **Notes** tab if you would like to add an internal note. If not, go to Step 20.

2. When complete, click on the **Save & Continue** button.

NOTE: Notes are viewable by you and others in your work group. These are not viewable by the Vendor, however, keep in mind that this information may be made available externally due to Freedom of Information requests.

NOTE: The next tab is the Change Orders tab. It has no functionality when creating an MBPO from scratch.



Step 20: Entering Reminders

1. Click on the **Reminders** tab if you want to send a reminder to yourself or another person within your organization. If not, go to Step 21.

2. Use the calendar icon in the **Due Date*** field to select the date of the reminder.

3. Enter your reminder text in the **Comment*** field.

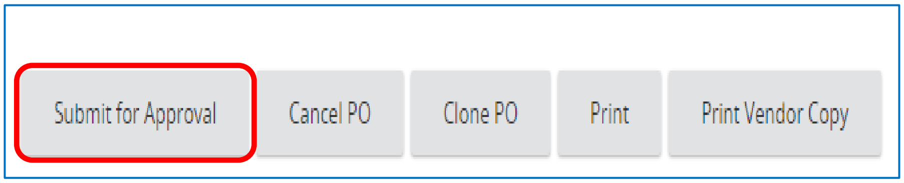
4. Select yourself or another internal recipient from the dropdown menu next to the **Remind Whom*** field.

5. If an advanced reminder is desired, enter a number in the **Days Prior to Remind*** field.

6. Click on the **Send Email** checkbox to ensure that the reminder notification is emailed to the intended recipient.

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

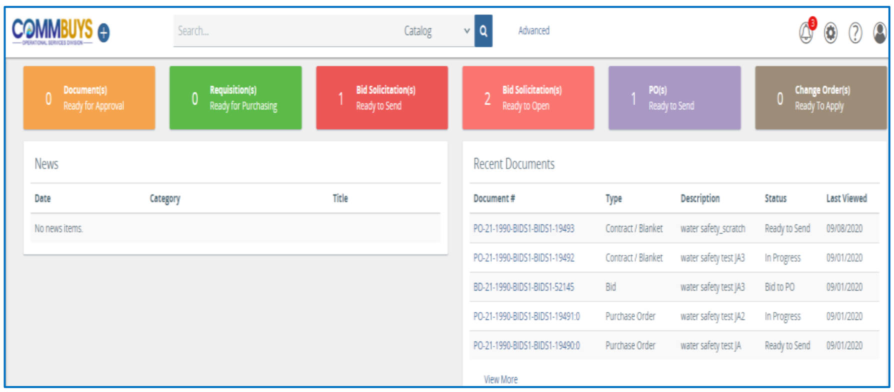
Screenshot	Directions



Step 21: Reviewing the Summary Tab Page

1. Click on the **Summary** tab and review the page. Changes may be made by reverting back to previous tabs.

2. If satisfied that the information is correct, click on the **Submit for Approval** button at the bottom of the page. The MBPO will be routed through your approval path.

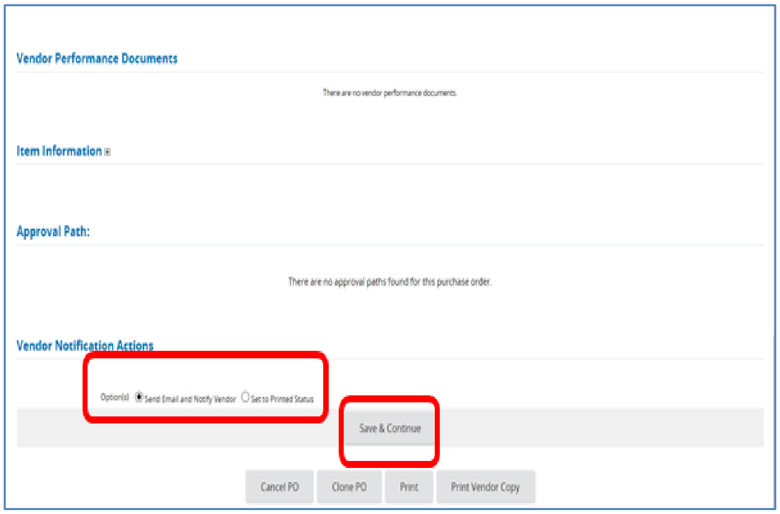


Step 22: Opening the MBPO

Once the MBPO 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 MBPO, or use the **Advanced** search function on the COMMBUYS home page to search for the MBPO.

Screenshot	Directions



Step 23: Sending the PO

1. The MBPO opens to the Summary tab with a status of Ready to Send. Scroll to the bottom of the page.

2. 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 MBPO and the MBPO 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 MBPO in COMMBUYS.

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