

## Job Aid: How to Create a Requisition using COMMBUYS Marketplace

This Job Aid shows how to:

- Search for items in Marketplace
- Create a Requisition in COMMBUYS using the Marketplace functionality

### Of Special Note:

Requisitions are documents used to request goods and services. A requisition is the first document used to generate a Purchase Order (PO).

In order to use Marketplace, the user must be logged into COMMBUYS as either a Department Access (DA) user or a Basic Purchasing (BP) user.

There are two methods available to initiate a requisition using Marketplace. One method that can be used for immediate search is to enter the desired item in the Search box at the top of the page.



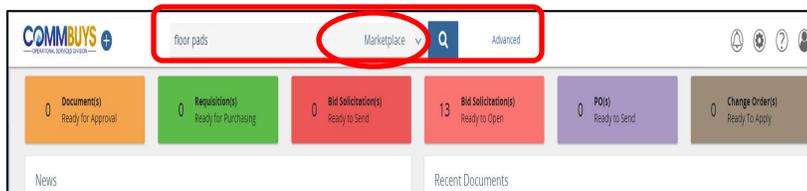
An alternate method is to click on the Marketplace icon located on the left side of the home page. This method can be used when browsing for items.



Both ways are described below in Steps 1 & 2.

### Screenshot

### Directions



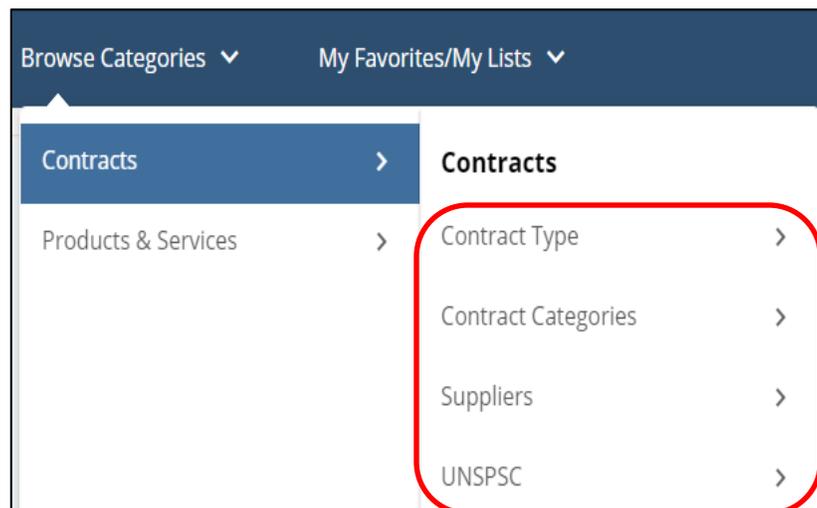
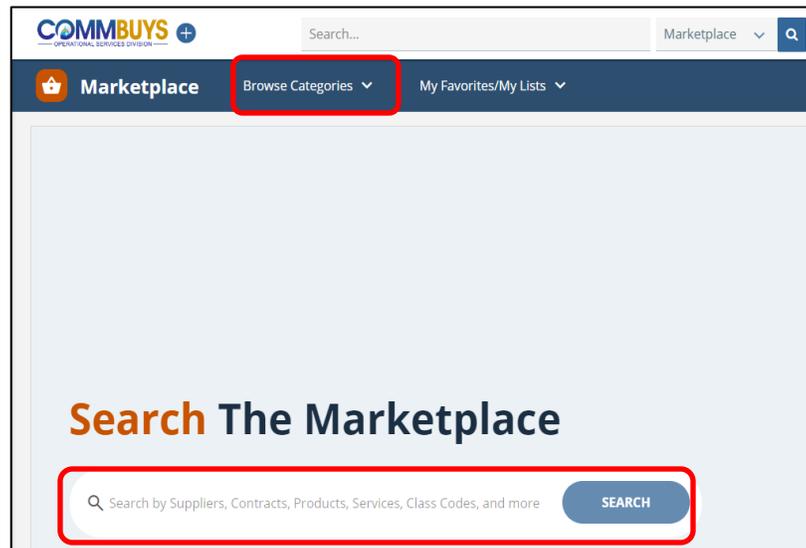
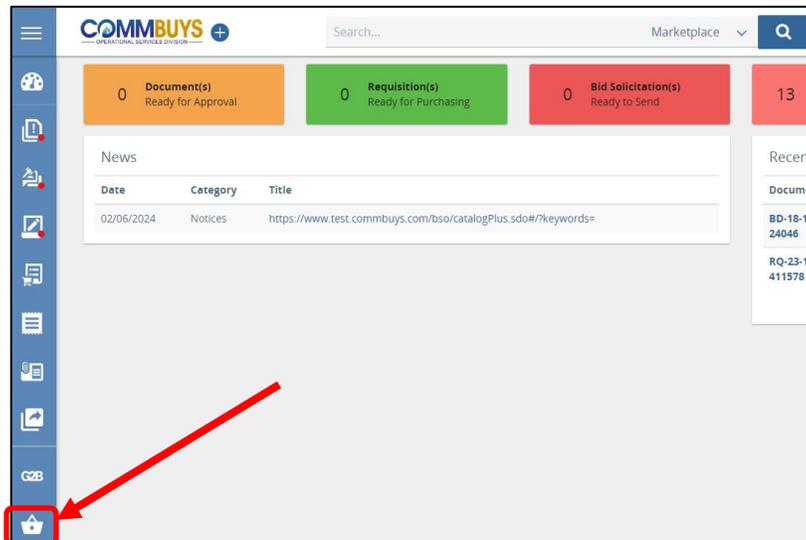
#### Step 1: Performing an Immediate Search (First Method)

1. After logging in to COMMBUYS, to perform an immediate search, enter an item, vendor, contract number, UNSPSC Code etc. into the **Search** box at the top of the screen, then click on the **magnifying glass** search icon. In this example, **floor pads** has been entered in the Search box.

**NOTE:** Ensure that **Marketplace** is the default display in the **Search** box.

If using this method, skip to **Step 3**, otherwise see **Step 2**.

## Screenshot



## Directions

### Step 2: Searching in Marketplace While Browsing (Alternate Method)

1. Click on the **Marketplace** icon



on the left side bar of the COMMBUYS Home Page.

2. This screen also displays a Search box on the bottom of the screen which can be used as shown in Step 1, however, to continue browsing, click on the **Browse Categories** button next to the Marketplace logo.

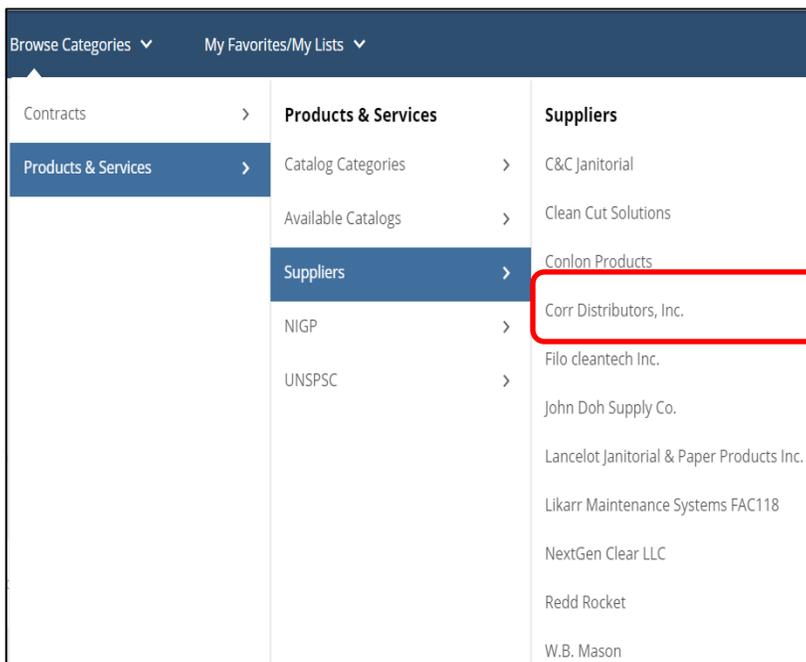
3. The dropdown menu displays two menu choices – **Contracts** or **Products & Services**. Click on the **Contracts** dropdown menu to display four submenus. Click on any of these submenus to display additional menu choices.

## Screenshot

## Directions



4. Click on the **Products & Services** dropdown menu to display five submenus. Click on any of these submenus to display additional menu choices.



5. In this example, a supplier was selected from the **Suppliers** dropdown menu.

## Screenshot

## Directions

The screenshot shows the Marketplace interface. At the top, there is a search bar with the text "Search the Marketplace" and a magnifying glass icon. Below the search bar, the text "floor pads" is entered. The search results are displayed below, showing 856 results. The first two results are highlighted with a red box. The first result is "ProTeam Super Quarter Vac Hepa Back Pack Vacuum 6 qt" by Corr Distributors, Inc. with a price of \$595.20. The second result is "ProTeam Super HalfVac Pro w/107098 kit" by Corr Distributors, Inc. with a price of \$600.00. The search bar and the first two results are also highlighted with a red box.

Marketplace Browse Categories My Favorites/My Lists Subtotal: \$0.00

Search the Marketplace

floor pads

KEYWORDS:

Search Results (856)

PRODUCTS & SERVICES (856) CONTRACTS (0)

1-25 of 856 results Sort By: Best Match

REFINE BY: Clear all

UNSPSC

- 14-11-17-02: Toilet seat covers (2)
- 14-11-17-03: Paper towels (16)
- 14-11-17-04: Toilet tissue (28)
- 15-12-18-03 (1)
- 26-11-17-02: Alkaline batteries (6)
- 27-11-20-04: Shovels (2)
- 31-19-15-05 (95)
- 31-27-00-00: Machine-made parts (1)

see more

Tags

ProTeam Super Quarter Vac Hepa Back Pack Vacuum 6 qt \$595.20 Ea - \$744.00 Discount: 20.00% Qty: 1 ADD TO CART

Corr Distributors, Inc.

SKU# V100 107118

UPC:

UNSPSC: 47-12-16-02

No image available

Add to Compare Add to List

ProTeam Super HalfVac Pro w/107098 kit \$600.00 Ea - \$750.00 Discount: 20.00% Qty: 1 ADD TO CART

Corr Distributors, Inc.

SKU# V100 107327

UPC:

UNSPSC: 47-12-19-00

No image available

Add to Compare Add to List

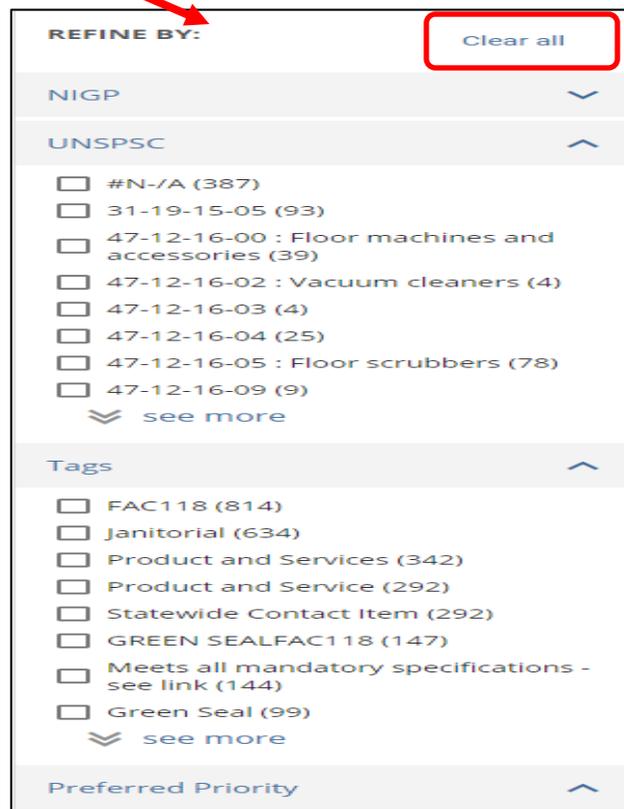
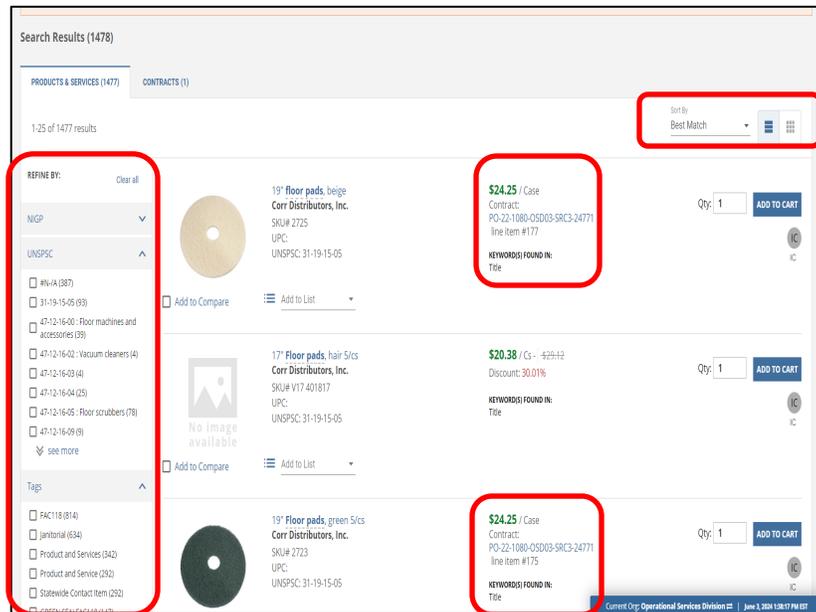
Current Org: Operational Services Division # | June 1, 2024 1:09:13 PM

- The screen displays all product offerings from this supplier available on the Statewide Contract.

**NOTE:** While you are browsing, the **Marketplace Search box** remains available for use at the top of the screen.

In this example, **floor pads** has been entered into the Marketplace Search box.

# Screenshot



# Directions

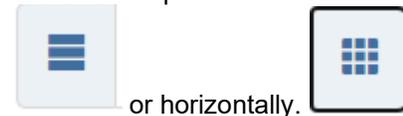
## Step 3: Filtering the Search

A list displays in response to the search criterion entered as floor pads. Links to the Master Blanket Purchase Order (MBPO) display beneath the unit price. Hovering over the MBPO number displays the alphanumeric contract number.

- To change the display sort, click on the down arrow next to **Best Match** in the **Sort By** field and select:

- Price: Low to High
- Price High to Low
- Product/Service Name: A-Z
- Product/Service Name: Z-A
- Preferred Priority (set by the OSD Contract Manager)

The two icons next to Best Match allow the user to view products either vertically



or horizontally.

The search can be further refined using the filters in the left column. These filters include:

- UNSPSC Code
- Tags
- Preferred Priority
- Catalog
- Catalog Categories
- Price
- Contract
- Manufacturer
- Brand
- Supplier
- Distributor
- SKU
- UPC
- Packaging

The **Clear All** hyperlink clears the filters from the search.

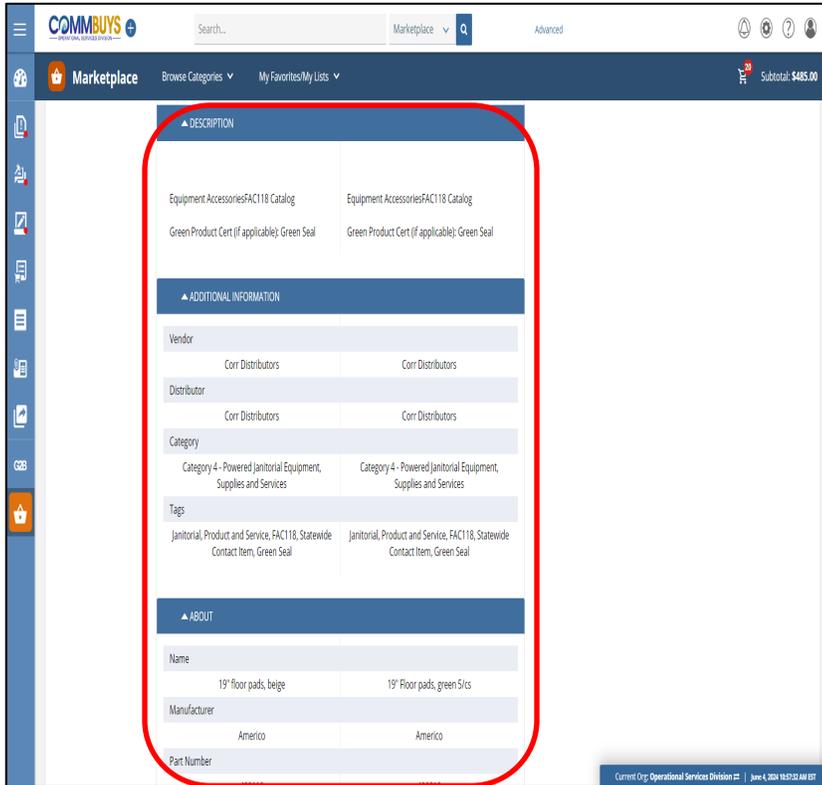
# Screenshot

# Directions

## Step 4: Comparing Items

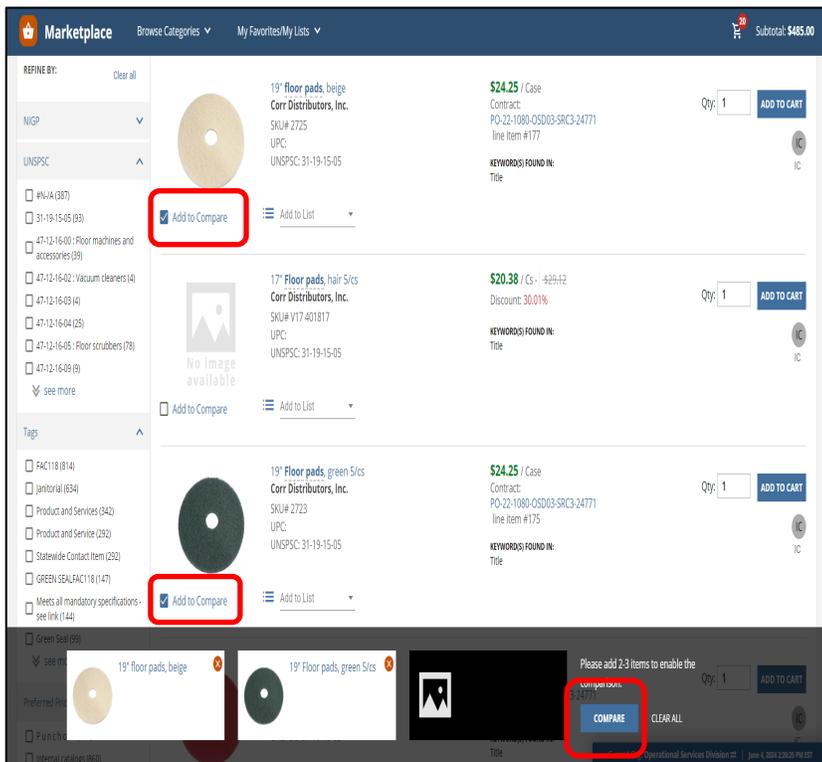
1. Click on the item image then scroll down to display details about the product. This detail includes the following sections:

- Description
- Additional Information
- About
- Specifications



2. Click on the **Add to Compare** checkbox underneath each item image to compare items. The items to compare display at the bottom of the screen.
3. Click on the blue **COMPARE** button at the bottom of the screen.

**NOTE:** Two items have been selected in this example. Up to three items can be compared at one time.



# Screenshot

# Directions

- When the screen re-displays, the compared items can be viewed side-by-side with the detail for each listed below.

The screenshot shows a product comparison interface. At the top, there are two product cards side-by-side. The left card shows a beige floor pad with the following details: 19" floor pads, beige; SKU# 2725; UPC: UNSPSC: 31-19-15-05; Corr Distributors, Inc.; \$24.25 / Case; Contract: PO-22-1080-OSD03-SRC3-24771 Line Item #177; Qty: 1; and an 'ADD TO CART' button. The right card shows a green floor pad with the following details: 17" Floor pads, green 5/cs; SKU# 2714; UPC: UNSPSC: 31-19-15-05; Corr Distributors, Inc.; \$20.18 / Case; Contract: PO-22-1080-OSD03-SRC3-24771 Line Item #168; Qty: 1; and an 'ADD TO CART' button. To the right of these cards is a large grey button with a plus sign and the text 'CLICK TO ADD'. Below the product cards is a detailed comparison table with the following sections:

DESCRIPTION	
Equipment AccessoriesFAC118 Catalog Green Product Cert (if applicable): Green Seal	Equipment AccessoriesFAC118 Catalog Green Product Cert (if applicable): Green Seal
ADDITIONAL INFORMATION	
Vendor Corr Distributors	Corr Distributors
Distributor Corr Distributors	Corr Distributors
Category Category 4 - Powered Janitorial Equipment, Supplies and Services	Category 4 - Powered Janitorial Equipment, Supplies and Services
Tags Janitorial, Product and Service, FAC118, Statewide Contact Item, Green Seal	Janitorial, Product and Service, FAC118, Statewide Contact Item, Green Seal
ABOUT	
Name 19" floor pads, beige	17" Floor pads, green 5/cs
Manufacturer Americo	Americo
Part Number 400119	400317
Brand Prolink	Prolink
SPECIFICATIONS	
UOM CS -	CS -
Quantity 0	0

## Screenshot

19" Floor pads, green 5/cs  
Corr Distributors, Inc.  
SKU# 2723  
UPC:  
UNSPSC: 31-19-15-05

\$24.25 / Case  
Contract:  
PO-22-1080-OSD03-SRC3-24771  
line item #175  
KEYWORD(S) FOUND IN:  
Title

Qty: 20 ADD TO CART

IC  
IC

Add to Compare  Add to List

**20** Subtotal: **\$485.00**

**20** Subtotal: **\$485.00**

Shopping Cart (1)

19" Floor pads, green 5/cs  
Corr Distributors, Inc.  
\$24.25

Qty: 20

IC  
IC

Total **\$485.00**

CLEAR ITEMS VIEW CART

Shopping Cart

Request Order:

Your Cart (20 Items)  
Release/On-Contract

Supplier: Corr Distributors, Inc.  
Title: 19" Floor pads, green 5/cs

UNSPSC: 31-19-15-05  
Contract:  
PO-22-1080-OSD03-SRC3-2477  
#175

QTY: 20 \$485.00

Save for later

Remove

Export Cart Items / Choose Format

DOWNLOAD

Saved for Later

## Directions

### Step 5: Selecting the Item

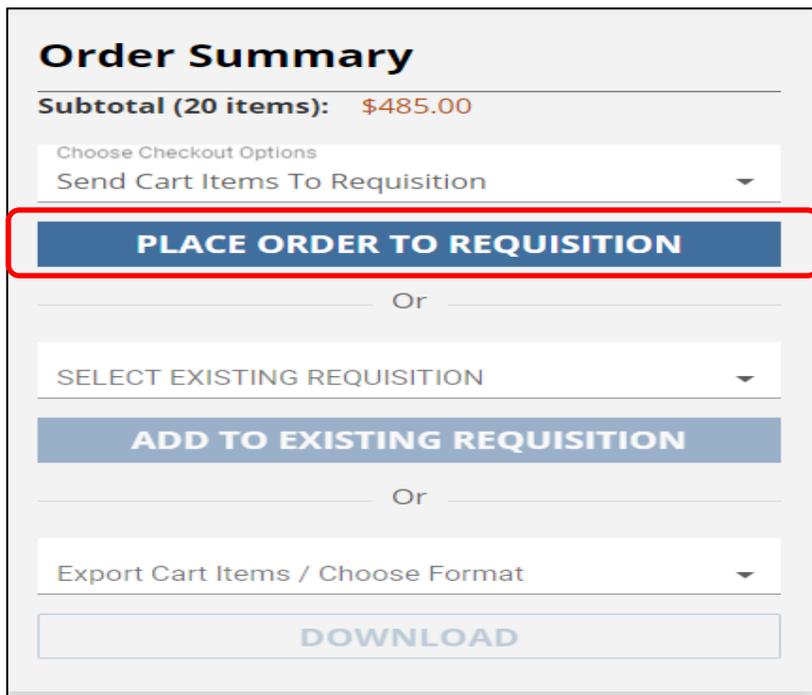
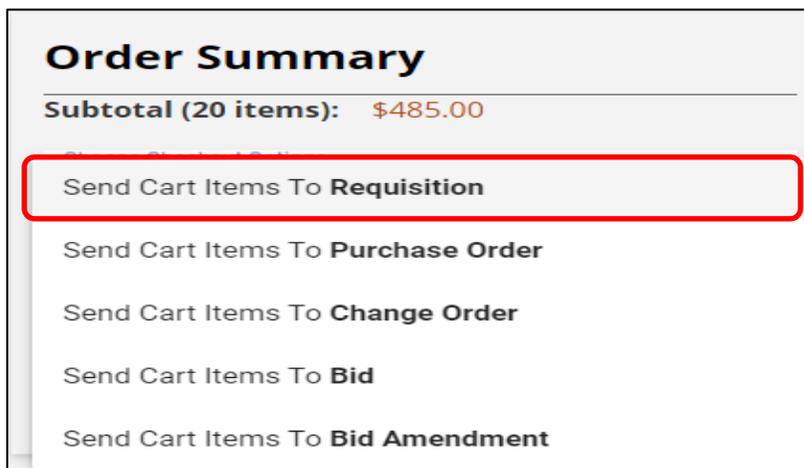
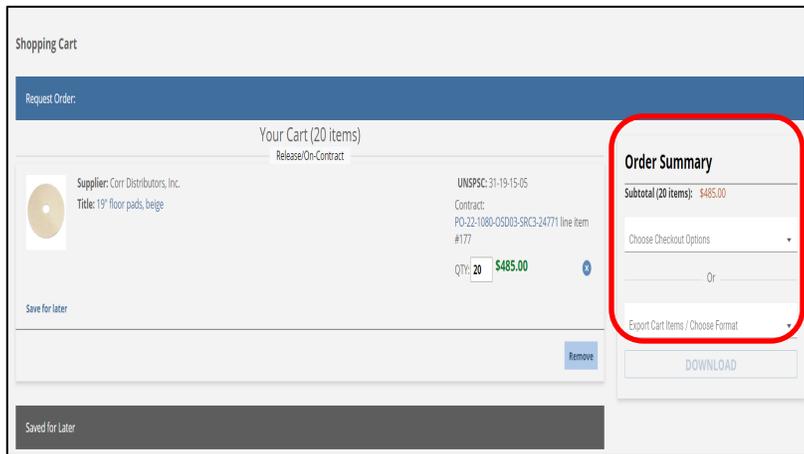
1. Click on the desired item image and enter the total amount of the item to be purchased in the **Qty:** column.
2. Click on the **ADD TO CART** button.

**NOTE:** If the item is available as a Punchout item, a button labelled **SHOP SITE** will display instead of the **ADD TO CART** button.

3. The shopping cart icon at the top right of the screen displays the number of items placed in the cart, and the subtotal dollar amount of the items.
4. Hovering over the shopping cart icon with the mouse displays detail about the items in the cart. Additional items may be added to the cart as described above.
5. When shopping is complete, click on the **VIEW CART** button.

6. When the screen re-displays, click in an open space to remove the overlay.

## Screenshot



## Directions

### Step 6: Adding the Item to a New Requisition

The order may be placed in a new requisition or may be added to an existing requisition. **To add to an existing requisition go to Step 7.**

The Order Summary box displays two dropdown menus:

- Choose Checkout Options
- Export Cart Items/Choose Format

**NOTE:** The dropdown menu choices will display according to the user's profile.

The **Choose Checkout Options** dropdown for Basic Purchasers include sending cart items to:

- Requisition
- Purchase Order
- Change Order
- Bid
- Amendment

**NOTE:** Department Access users will only have the **Requisition** option.

1. Click on **Send Cart Items to Requisition**.
2. To add the order to a new Requisition, click on the **PLACE ORDER TO REQUISITION** button.

## Screenshot

Release Requisition RQ-24-1080-OSD01-OSDPL-411618 Status: RR - In Progress

General Items Vendors Address Accounting Routing Attachments Notes Reminders **Summary**

### Header Information

Requisition Number:	RQ-24-1080-OSD01-OSDPL-411618	Short Description:	Catalog Requisition	Status:	RR - In Progress
Organization:	Operational Services Division	Location:	OSDPL - Ashburton P-11	Required By Date:	06/04/2024
Department:	OSD01 - Operational Services Division	Requisition Type:	Release	Type Code:	
Entered Date:	06/04/2024	Purchaser:	Paul Martin	Fiscal Year:	2024
Requestor:	Paul Martin	Contact Phone:	617679-1525	Alternate ID:	
Contact:	Paul Martin	Print Format:	Requisition Print		
Estimated Cost:	\$485.00				
Solicitation Enabled:	No				
Invoice Method:	Three Way Match				
Ship-to Address:	William Hallinan 1 Ashburton Place Room P-11 Boston, MA 02108 US Email: <a href="mailto:tes@percipetoolings.com">tes@percipetoolings.com</a> Phone: 123456-7890	Bill-to Address:	Accounts Payable 1 Ashburton Place Room 1017 Room 1017 Boston, MA 02108 US Email: <a href="mailto:tes@percipetoolings.com">tes@percipetoolings.com</a> Phone: 123456-7890		

Special Instructions:

### Attachments

Agency Files:  
Agency Forms:  
Vendor Files:  
Vendor Forms:

### Item Information

Submit for Approval Cancel Requisition Clone Requisition Print

## Directions

The order displays on the **Summary** tab page of the new Requisition.

Release Requisition RQ-24-1080-OSD01-OSDPL-411618

General **Address** Accounting Routing Attachments Notes Reminders Summary

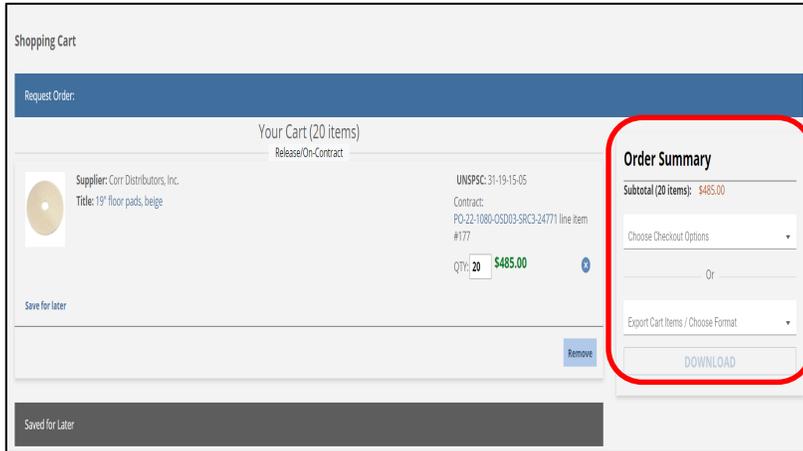
Requisition Number:	RQ-24-1080-OSD01-OSDPL-411618	Short Description:	Catalog Requisition
Status:	RR - In Progress	Fiscal Year:	2024
Department:	OSD01 - Operational Services Division	Organization:	Operational Services Division
Location:	OSDPL - Ashburton P-11	Solicitation Enabled:	<input type="checkbox"/>
Required By Date:	06/04/2024	Entered Date:	06/04/2024
Requisition Type:	Release	Type Code:	
Requestor:	Paul Martin	Purchaser:	Martin, Paul
Contact:	Paul Martin	Contact Phone:	617 979 1525
Alternate ID:		Estimated Cost:	\$485.00
Print Format:	Requisition Print		
Special Instructions:			
Date Last Updated:	06/04/2024 12:20:57 PM	User Last Updated:	Paul Martin

Save & Continue

3. Click on the **General** tab and replace the generic statement **Catalog Description** in the **Short Description** field with a more unique and meaningful description.
4. If desired, other fields such as **Alternate ID** and **Special Instructions** may be populated, then click on the **Save & Continue** button.
5. Click on the **Address** tab to ensure that the **Ship-to** and **Bill-to** addresses are correct for this order and change if appropriate.
6. The **Attachments**, **Notes**, and **Reminders** tabs may also be populated at this time if needed.
7. Click on the **Summary** tab, scroll to the bottom of the page and click on the **Submit for Approval** button.

**Go to Step 8.**

## Screenshot



## Directions

### Step 7: Adding the Item to an Existing Requisition

The Order Summary box displays two dropdown menus:

- Choose Checkout Options
- Export Cart Items/Choose Format

**NOTE:** The dropdown menu choices will display according to the user's profile.

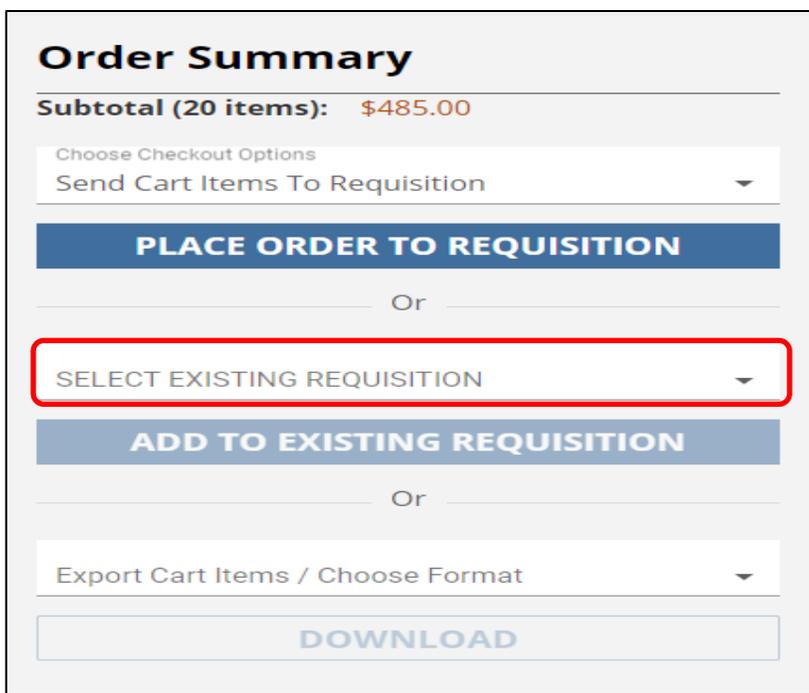
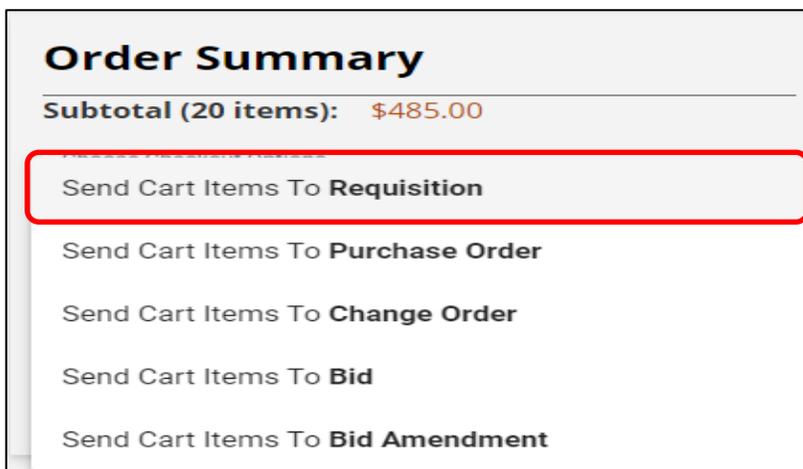
The **Choose Checkout Options** dropdown for Basic Purchasers include sending cart items to:

- Requisition
- Purchase Order
- Change Order
- Bid
- Amendment

**NOTE:** Department Access users will only have the **Requisition** option.

1. Click on **Send Cart Items to Requisition**.

2. To add the order to an existing Requisition, click on **SELECT EXISTING REQUISITION**.



## Screenshot

## Directions

**Order Summary**  
Subtotal (20 items): \$485.00

Choose Checkout Options  
Send Cart Items To Requisition

**PLACE ORDER TO REQUISITION**

Or

SELECT EXISTING REQUISITION

RQ-24-1080-OSD01-OSDPL-411618 - Catalog Requi...

RQ-23-1080-OSD01-OSDPL-411578 - FAC113 Desig...

**Order Summary**  
Subtotal (20 items): \$485.00

Choose Checkout Options  
Send Cart Items To Requisition

**PLACE ORDER TO REQUISITION**

Or

SELECT EXISTING REQUISITION

RQ-24-1080-OSD01-OSDPL-411618 - Catalog Re... ▾

**ADD TO EXISTING REQUISITION**

Or

Export Cart Items / Choose Format

DOWNLOAD

3. Select the desired requisition from the dropdown menu.

4. Click on the **ADD TO EXISTING REQUISITION** button.

5. The order displays on the **Summary** tab page of the new Requisition.

6. Click on the **General** tab and replace the generic statement **Catalog Description** in the **Short Description** field with a more unique and meaningful description.

7. If desired, other fields such as **Alternate ID** and **Special Instructions** may be populated, then click on the **Save & Continue** button.

8. Click on the **Address** tab to ensure that the **Ship-to** and **Bill-to** addresses are correct for this order and change if appropriate.

9. The **Attachments**, **Notes**, and **Reminders** tabs may also be populated at this time if needed.

10. Click on the **Summary** tab, scroll to the bottom of the page and click on the **Submit for Approval** button.

**Go to Step 8.**

Release Requisition RQ-24-1080-OSD01-OSDPL-411618 Status: 100 - In Progress

No approval path meets the document criteria. Do you want to manually add approvers or mark the requisition as approved?

Manually add approvers

Automatic approval

Please select an approver if you want to manually add approvers.

Approver

### Step 8: Submitting for Approval

1. Select the radio button for **Automatic Approval** if available. Otherwise, select the appropriate approval path.

The default approval path displays, or the purchaser is given the option to select an alternate approval path.

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

**NOTE:** The requisition will now proceed through the approval path (no image is provided here as the approval path will vary).

The Purchaser will be informed by COMMBUYS email when the approval is complete, at which point you can log back into COMMBUYS to view or continue with the next step.

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

## Screenshot



## Directions

### Step 9: Viewing the Summary Tab

After approval, the Requisition Summary tab redisplay. The status has been updated to **Gone to PO**.

**NOTE:** If the status is **Ready for Purchasing** after approval, then scroll to the bottom of the Summary tab page and click on the **Convert to PO** button.

**Step 10: Completing the PO**

Direct Release POs will automatically send after the requisition has been approved and the status displays as **Sent**.

If this is not a Direct Release PO and your PO is in **Ready to Send** status, scroll to the bottom of the page and click on the **Save & Continue** button to send an email notification to the Vendor.

**NOTE:** If you purchased from a Standard Release contract that is set up as a Distributor Model or is Solicitation Enabled, OSD recommends following the How to Request Quotes from Vendors on Statewide Contracts job aid which is in the COMMBUYS Bids section of the job aid page.