Job Aid:

How to Create a Solicitation Enabled Bid Using a Release Requisition

This Job Aid Shows How To:

- Create a solicitation enabled release requisition in COMMBUYS
- Convert the requisition to a bid
- Submit a bid to eligible vendors

Of Special Note:

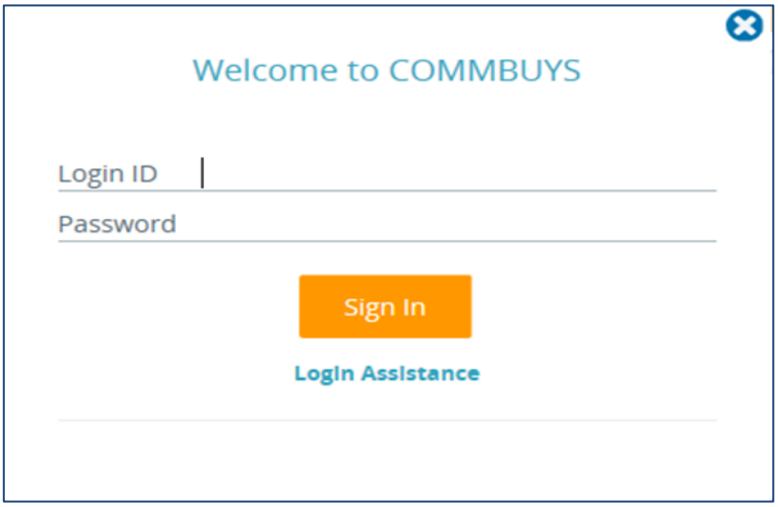
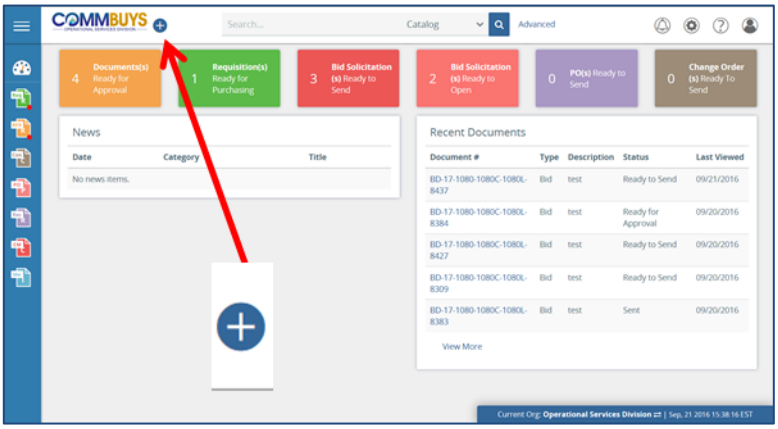
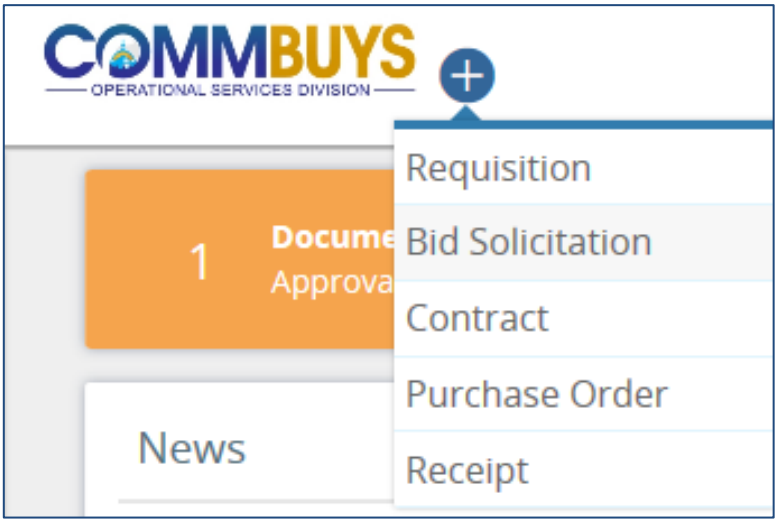
A solicitation enabled release is a document used to solicit quotes from vendors who have Master Blanket Purchase Orders (MBPOs), or contracts in COMMBUYS. After creating the requisition, the document can be converted to a bid, and after approval, sent to selected vendors. This COMMBUYS functionality allows you to comply with OSD policy for using many statewide contracts (SWCs).

Note: To use this functionality, the MBPO must be designated as "solicitation enabled". The SWC Users Guide will indicate if you must solicit quotes for goods or services. Before beginning the requisition, access the MBPO General tab and verify that the solicitation enabled field displays a "Yes".

Screenshot	Directions
	Step 1: Signing in to COMMBUYS 1. Launch the COMMBUYS website by entering the URL (https://www.commbuys.com) in the browser or by clicking on the hyperlink COMMBUYS. 2. Click on the orange **Sign In** button in the upper right hand corner.

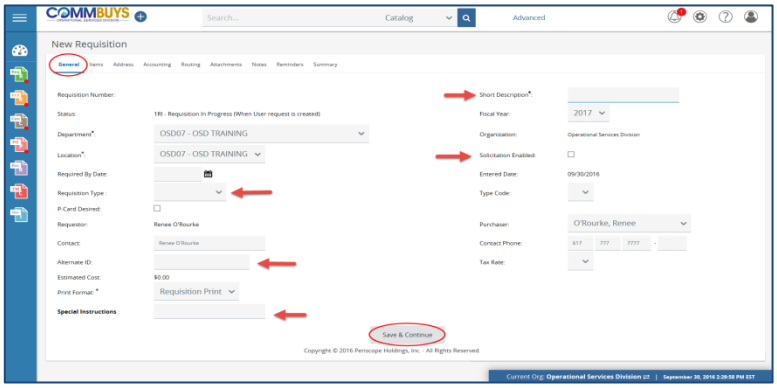
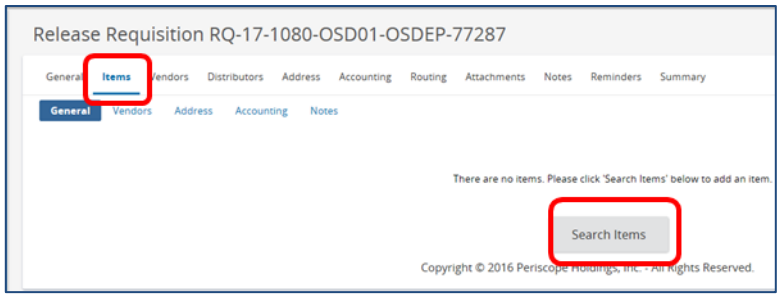
Job Aid:

How to Create a Solicitation Enabled Bid Using a Release Requisition

Screenshot	Directions
	**Step 2: Logging In** 1. Enter your Login ID and Password. 2. Click on the **Sign In** button.
	**Step 3: Creating a New Document** Click on the **Add Documents** (plus sign) icon.
	**Step 4: Selecting Requisition** Select Requisition from the dropdown menu.

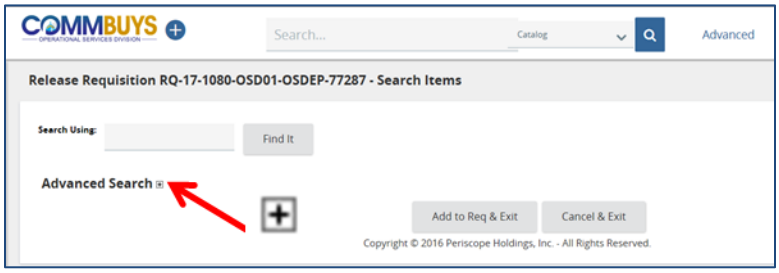
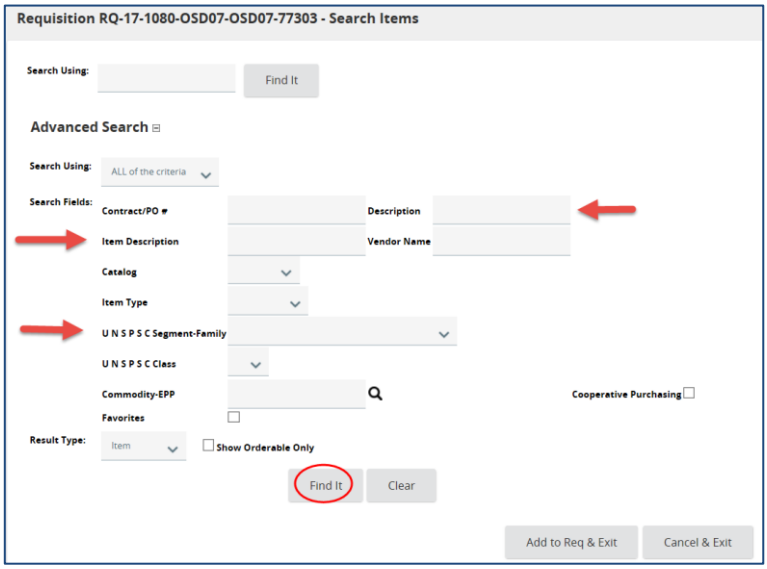
Job Aid:

How to Create a Solicitation Enabled Bid Using a Release Requisition

Screenshot	Directions
	**Step 5: Entering Data in the General Tab** The **General** tab page displays. Fields with asterisks are required fields. The required fields for **Department, Location**, and **Print Format** default to values that may be changed if needed. 1. In the required **Short Description** field enter a searchable description of the desired goods or services. 2. Click on the dropdown arrow next to the **Requisition Type** field and select **Release.** 3. Check the checkbox next to **Solicitation Enabled**. 4. **Alternate ID**: Optional. Enter information as required. This may include (but is not limited to) data such as MMARS encumbrance ID or ERP/Accounting system transaction numbers for non-MMARS users. 5. **Special Instructions**: Optional. Enter information as required. This field allows for entry of specific instruction to vendors. If entered on the requisition, the data in this field will copy forward to the PO and also be visible on the print version of the PO. This may include (but not limited to) data such as shipping drop off info, locations, additional contacts, etc. 6. When you are finished, click on the **Save and Continue** button.
	**Step 6: Searching for Items** 1. Click on the **Items** tab. 2. Click on the **Search Items** button.

Job Aid:

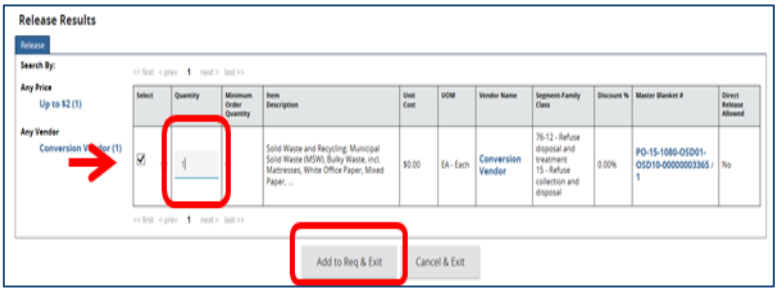
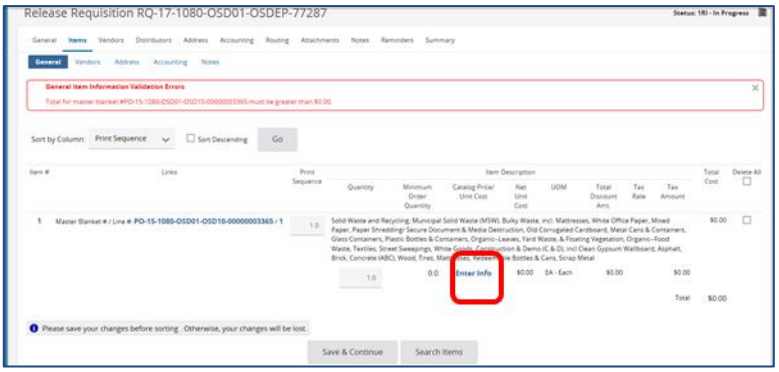
How to Create a Solicitation Enabled Bid Using a Release Requisition

Screenshot	Directions
	**Step 7: Conducting an Advanced Search** 1. Click on the **Advanced Search** plus sign **(+)** icon
	**Step 8: Search Using Criteria** 1. Search by entering criteria into the **Description, Item Description,** or **UNSPSC Segment-Family** fields. 2. Click on the **Find It** button.

OPERATIONAL SERVICES DIVISION

Job Aid:

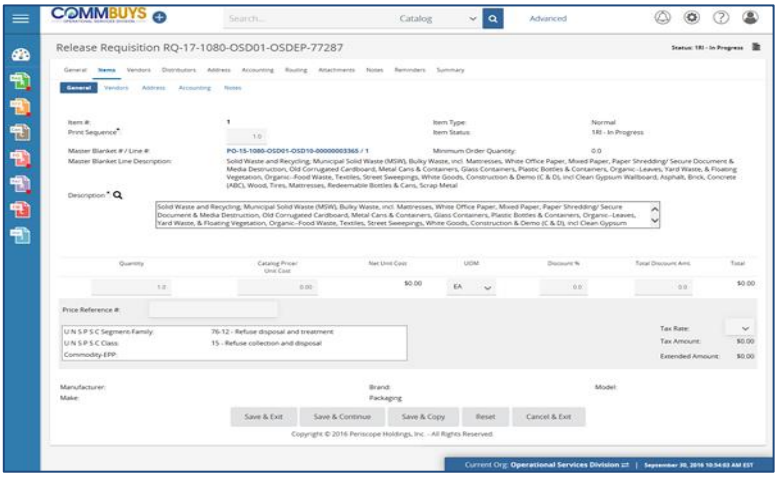
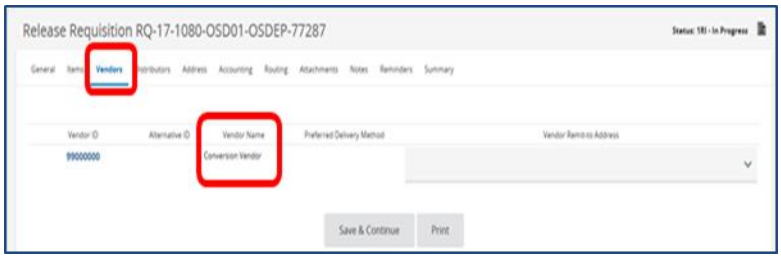
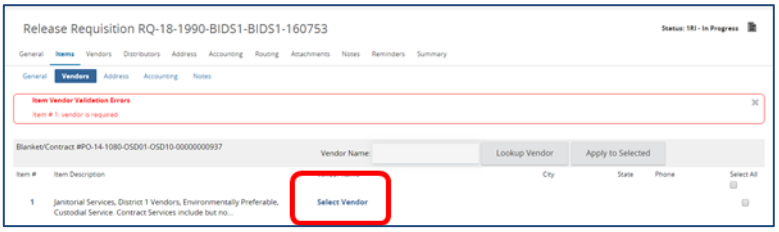
How to Create a Solicitation Enabled Bid Using a Release Requisition

Screenshot	Directions
	**Step 9: Selecting the Item** 1. Check the Select box of the desired item and enter a number in the quantity field. 2. Click on the **Add to Req & Exit** button.
	**Step 10: Clicking on the Enter Info Hyperlink** The screen displays a warning message regarding a zero dollar amount. Click the **Enter Info** hyperlink.

OPERATIONAL SERVICES DIVISION

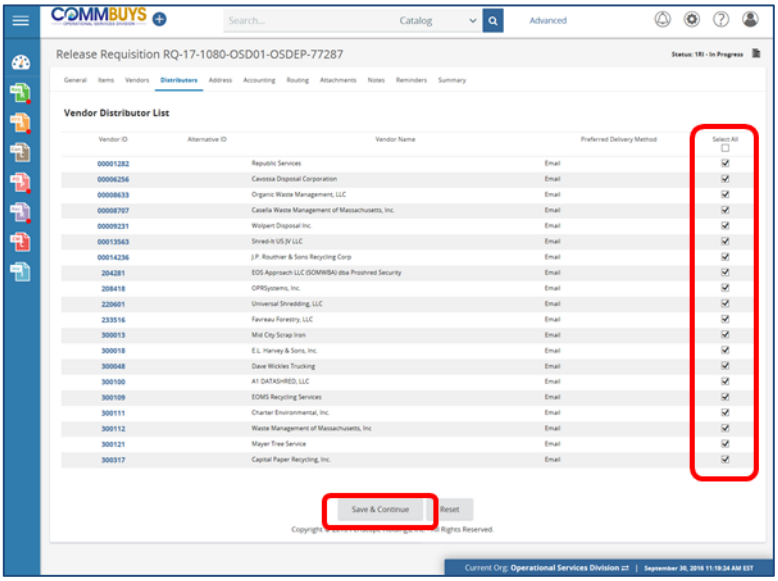
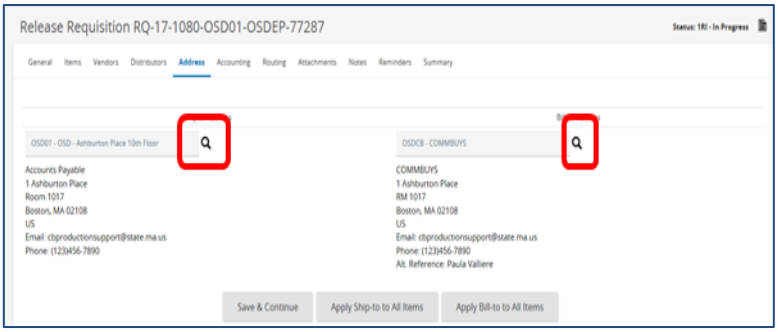
Job Aid:

How to Create a Solicitation Enabled Bid Using a Release Requisition

Screenshot	Directions
	**Step 11: Entering More Information** Each MBPO displays items in a different fashion. If the description is every item or service offered, delete the displayed text and enter an accurate description with detail for the product or service for which you wish to obtain a quote. **Note**: You can use the Attachments tab to add further detail from a Word or Excel document. The following fields should be completed: • **Print Sequence #:** Change this auto-filled field if the order of the bid line items should print in a different order from the Item number order. • **Description*:** Enter a description of the product or service up to 1000 characters. • **Quantity:** Enter the quantity if known or enter **1** if unknown. • **Unit Cost:** Enter the cost of the product or service per 'unit' of quantity. Enter 1.00. • **UOM**: Select the unit of measure (UOM) - how the item is sold, packaged, or purchased - from the dropdown menu. When finished, click on the **Save & Continue** button.
 	**Step 12: Validating the VendorsTab** 1. Click on the **Vendors** tab. The Vendor name displays **Conversion Vendor** which is correct. **NOTE:** If Conversion Vendor does not display you will see a red Validation Error identifying that a "vendor is required". If this happens, do the following: 1. Click on the **Items** tab 2. Click on the **Vendors** sub tab 3. In the Vendor Name column, click on the blue **Select Vendor** hyperlink 4. Click on the **radio button** for any vendor 5. Click on the **Select** button at the bottom of the screen, then continue on to Step 13 to select your vendors on the Distributors tab.

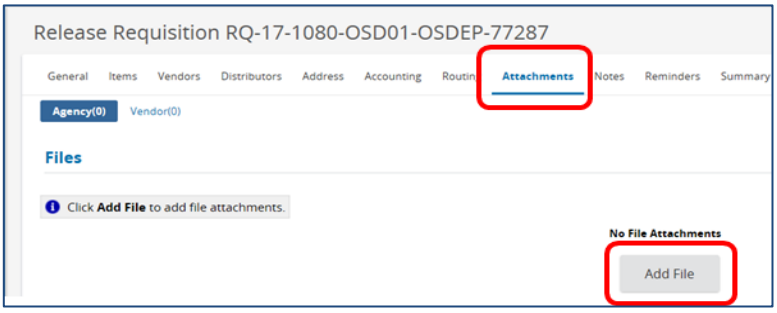
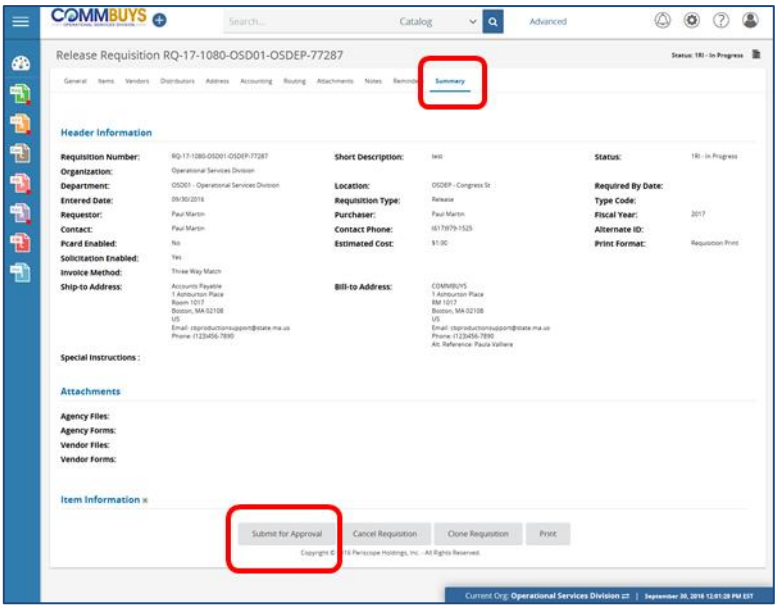
Job Aid:

How to Create a Solicitation Enabled Bid Using a Release Requisition

Screenshot	Directions
	**Step 13: Completing the Distributors Tab** Click on the Distributor tab. This screen displays all the vendors on the MBPO who can be selected to notify. 1. Click on the checkbox in the **Select** column to choose vendors from which you request information and quotes OR click on the checkbox at the top of the Select column to select all vendors. Follow OSD and Department policy when choosing vendors. The Contract User Guide for the Statewide Contract you are buying from will give you guidance. 2. Click the **Save & Continue** button.
	**Step 14: Validating the Address Tab** 1. Click the **Address** tab. 2. The Address page should prefill. Update the Address page by clicking on the magnifying glass if items are being shipped to or billed to a different address than the default. 3. If no change is required go to Step 15. 4. If there is an error message indicating that no valid ship-to address exists, click on the magnifying glass icon to select a Ship-to address. **NOTE:** If you want the option to ship to multiple addresses, go back to the Items tab and select the Address sub tab.

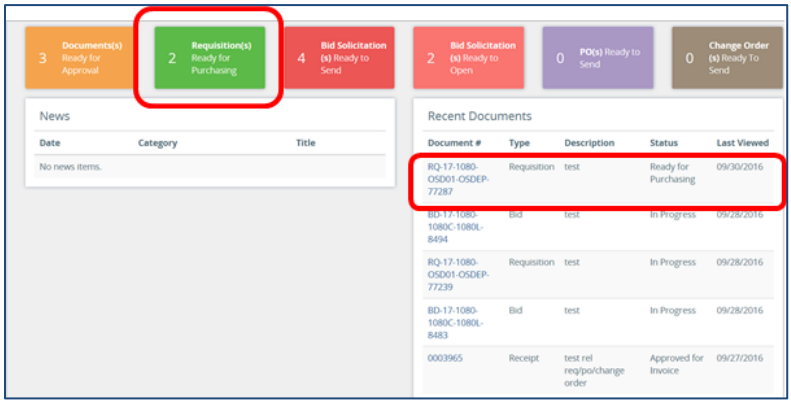
Job Aid:

How to Create a Solicitation Enabled Bid Using a Release Requisition

Screenshot	Directions
	**Step 15: Adding Attachments** **NOTE:** The Accounting tab is not currently used in COMMBUYS. The Routing tab is not activated until after you submit it for approval. 1. Click the **Attachments** tab. If any files auto-attach, review, keep, or delete as necessary. Attachments can include bid attachments and required forms and contract documents 2. Click the **Add File** button to add a new file.
	**Step 16: Submitting for Approval** **Note:** The Notes and Reminders tabs are optional. 1. Click on the **Summary** tab to review all of the entered data. 2. Click on the **Submit for Approval** button at the bottom of the page.

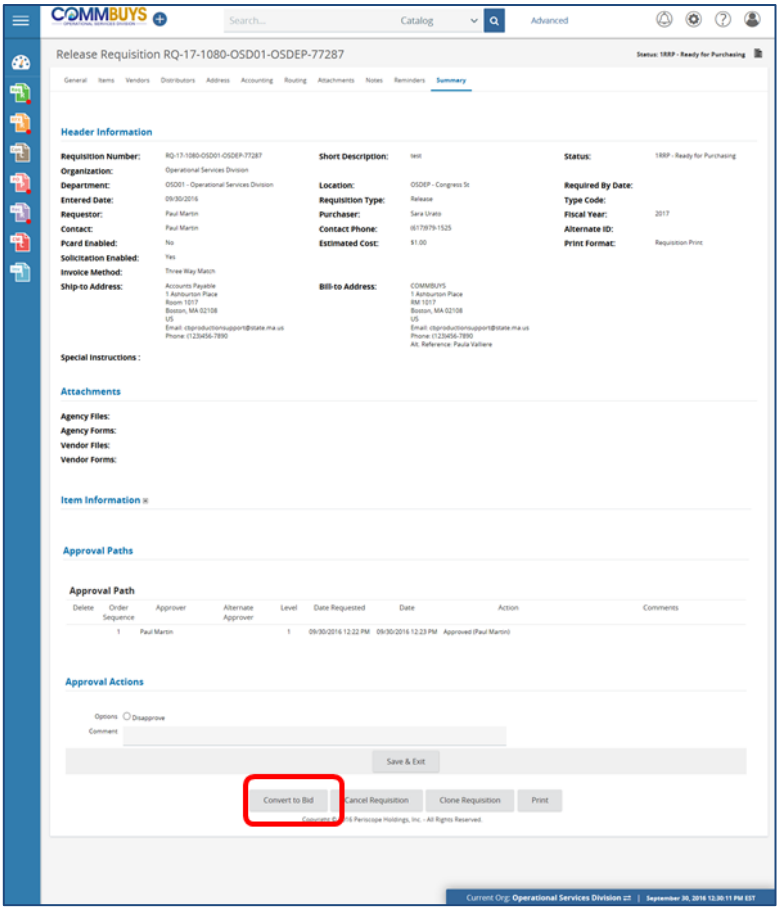
Job Aid:

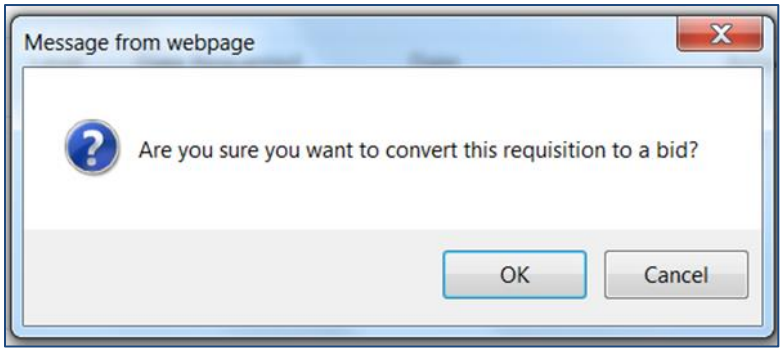
How to Create a Solicitation Enabled Bid Using a Release Requisition

Screenshot	Directions
	Step 17: Approval Path 1. The approval path is shown or you're given the option to select the appropriate one. Click the **Save & Continue** button to complete. **NOTE**: The requisition will now proceed through your department's approval path (**no image is provided here as your approval path will vary**). You will be informed by COMMBUYS email when the approval is complete, at which point you can log back into COMMBUYS and continue with Step 18.
	**Step 18: Locating the Requisition** Once approved, locate the approved requisition by clicking on the **Requisitions Ready for Purchasing** box, or it may be found in the **Recent Documents** section. Either method will display the requisition after clicking on the blue hyperlink.

Job Aid:

How to Create a Solicitation Enabled Bid Using a Release Requisition

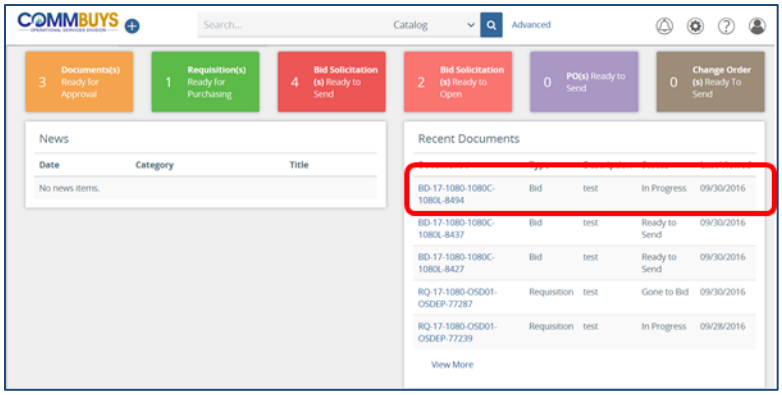




Step 19: Converting the Requisition to a Bid

1. The requisition opens to the Summary tab. Scroll to the bottom of the page and click on the **Convert to Bid** button.

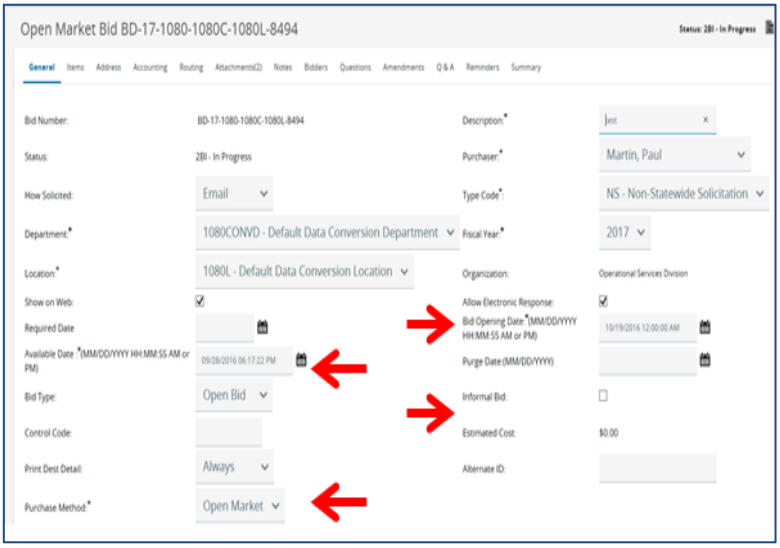
   A popup dialogue box displays asking "Are you sure you want to convert this requisition to a bid?" Click on the **OK** button to confirm.



Step 20: Locating the Bid

Return to the COMMBUYS homepage, locate the bid in progress under **Recent Documents**, and click on the blue hyperlink.

The bid opens to the **Summary** tab page.



Step 21: Completing the General Tab

1. Click on the General tab.

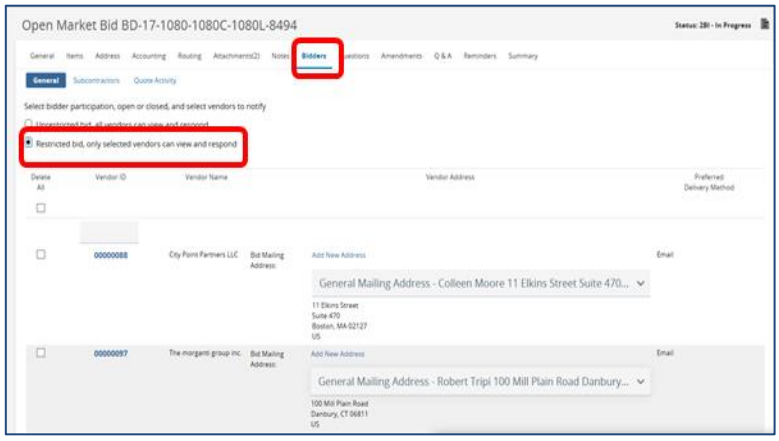
2. Complete the following fields:
   - **Available Date** – Enter the date the bid (solicitation) is made available to vendors to submit quotes. Click on the calendar icon to set the desired month, day, and time.
   - **Bid Opening Date** – Enter the date the bid will close and quotes can be opened for viewing. Click on the calendar icon to set the desired month, day, and time.
   - **Informal Bid** – Check this box if you wish to view quotes as submitted (prior to the Bid Opening Date). **Note:** This option should only be used for closed bids to vendors on contract. Refer to policy for further clarification.
   - **Purchase Method** – This option should default to Open Market. If not, then select **Open Market** from the dropdown menu.

3. When finished, scroll to the bottom of the page and click on the **Save and Continue** button.

Step 22: Reviewing the Tabs

All information from the requisition is now part of the bid. Always review and verify that all information is accurate on the **Items, Address**, and **Attachments** tabs.

The Amendments tab has no functionality until after the bid is posted.

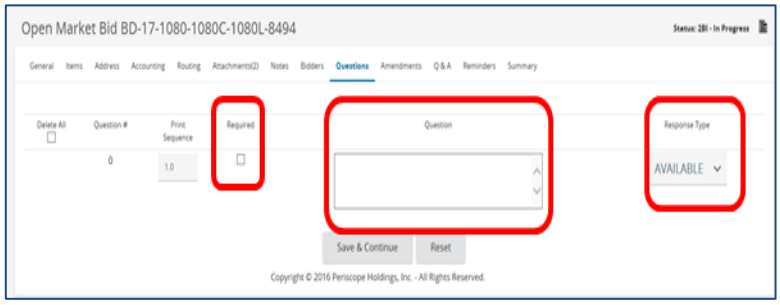


Step 23: Adding Bidders

1. Click on the **Bidders** tab. There is no Vendor tab on a bid. All vendors entered on the requisition are now listed as bidders.

2. Click on the radio button next to **Restricted Bid** to ensure that only selected vendors can view and respond. Click **Save & Continue.**

3. If you want vendors to see your price, select the Show Unit Prices to Vendors checkbox at the bottom of the page.



Step 24: Completing the Questions Tab

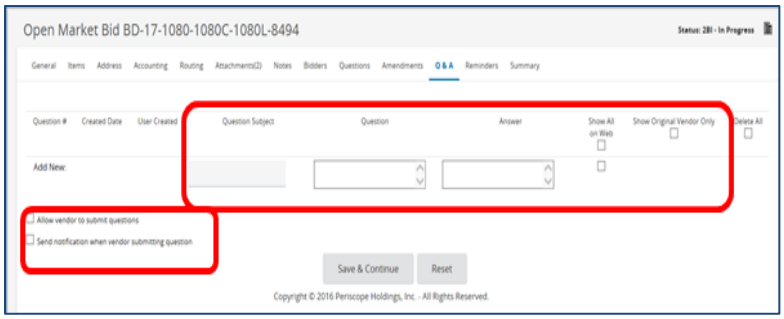
1. Click on the **Questions** tab.

2. Ask vendors questions by entering text in the **Question** field.

3. Select the **Required** checkbox if the questions must be answered before the quote can be submitted by the vendor.

4. Select a value from the **Response Type** dropdown list to establish a format for the vendor response.

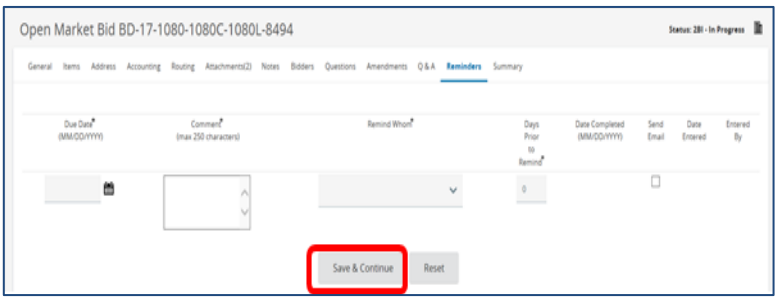
5. Select the **Save & Continue** button to save your entries.



Step 25: Completing the Q&A Tab

NOTE: The Amendments tab is not activated until after the bid is sent.

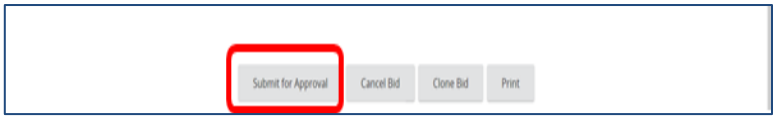
1. Click on the Q&A tab.
2. To allow dialogue with the vendors, select the **Allow vendor to submit questions** checkbox.
3. If you would like COMMBUYS to notify you when a vendor submits a question, select the **Send notification when vendor submitting question** checkbox.
4. If desired, you or the vendor can enter a **Question Subject** and **Question** into the respective fields, and the other party can respond in the **Answer** field.
5. If you wish to display the dialogue on the Web, click on the **Show on Web** checkbox. The **Show Original Vendor Only** checkbox is available if appropriate. Consult OSD and Department policy for guidance.
6. When complete, click on the **Save & Continue** button.



Step 26: Completing the Reminders Tab

If desired, click the **Reminders** tab to send a reminder to yourself or another person within your organization.

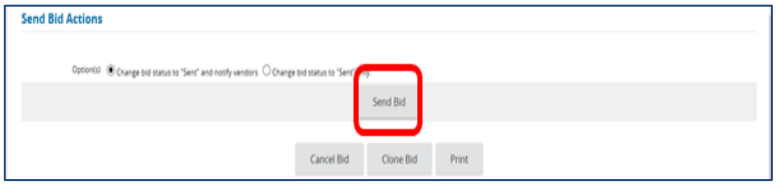
1. Use the calendar icon in the **Due Date** field to select the date of the reminder then enter your reminder text in the **Comment** field.
2. Select yourself or another internal recipient in the drop-down menu next to **the Remind Whom** field.
3. If an advanced reminder is desired enter a number in the **Days Prior to Remind** field.
4. If you would like to send the reminder via email, select the **Send Email** checkbox.
5. When complete, click on the **Save & Continue** button.



Step 27: Reviewing the Summary Tab

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.

At this point the bid will proceed through your approval process.



Step 28: Sending the Bid

1. Once the bid is approved, return to the **Summary** tab page of the bid.
2. Scroll to the bottom of the page and click on the **Send Bid** button.