

## Job Aid:

### How to Create a WTO Notice of Intent and Bid Solicitation in COMMBUYS/CLM

#### This Job Aid shows how to:

- Create a World Trade Organization (WTO) Notice of Intent in CLM and follow up with a Request for Response (RFR) bid solicitation.

#### Of Special Note:

- In compliance with the WTO's Agreement on Government Procurement (AGP), departments seeking goods and services including human and social services valued at more than \$498,000 or construction valued at more than \$7,008,000 must post either:

a) Full Bid documents and materials for at least 40 days prior to the Bid Opening Date, or

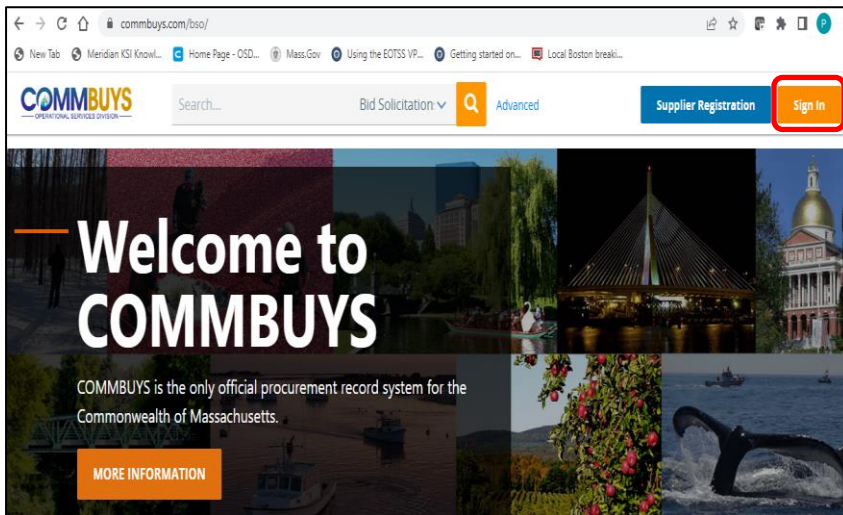
b) An Intent to Post notice with a later amendment to add the full bid documents and materials for a combined period of at least 40 days prior to the Bid Opening Date. This is a two-step process:

This job aid covers Part b) above.

- CLM is only available to Executive Agencies.

#### Screenshot

#### Directions

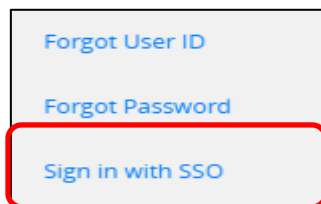
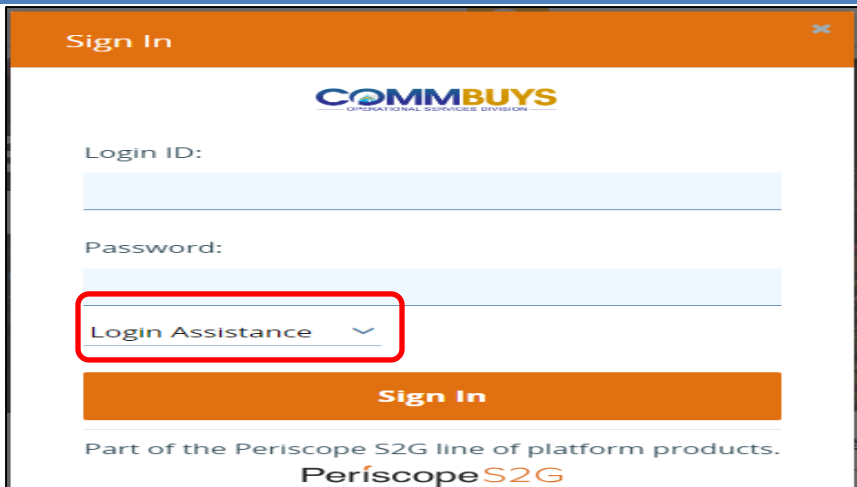


#### Step 1: Logging into COMMBUYS/CLM

1. Log into COMMBUYS/CLM by entering **commbuys.com** into the URL address box of your browser.
2. When the COMMBUYS Landing Page displays, click on the gold and white **Sign In** button at the top right of the page.

## Screenshot

## Directions



3. When the Sign In page displays, click on the **down arrow** next to Login Assistance.

4. Select Sign in with SSO from the dropdown menu.

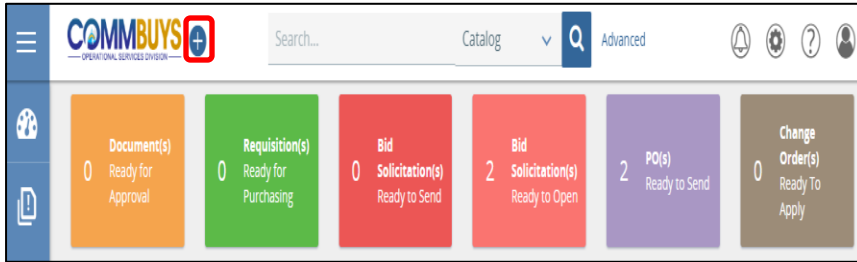


5. Enter your Commonwealth **Email address** and **Password**, then click on the **Continue** button.

**NOTE:** Use the **Forgot password?** hyperlink if needed and COMMBUYS/CLM will send a password email to your email address.

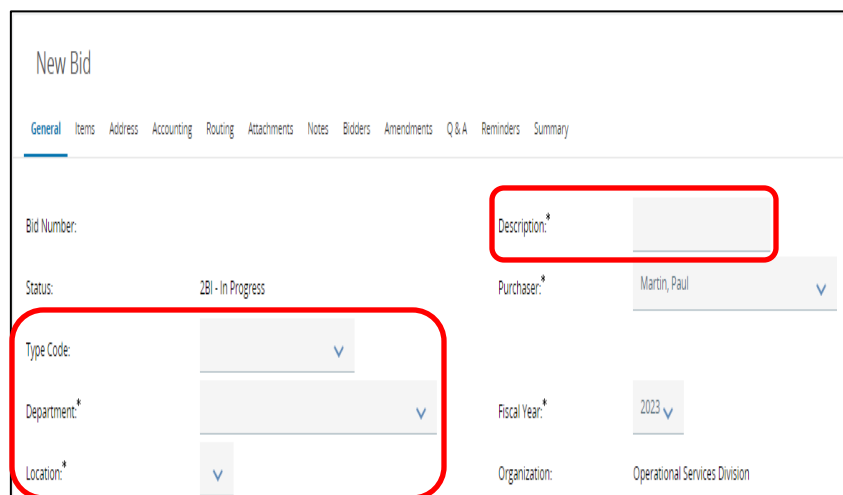
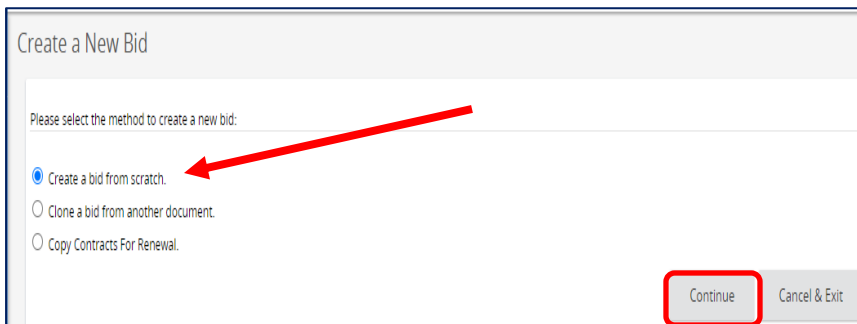
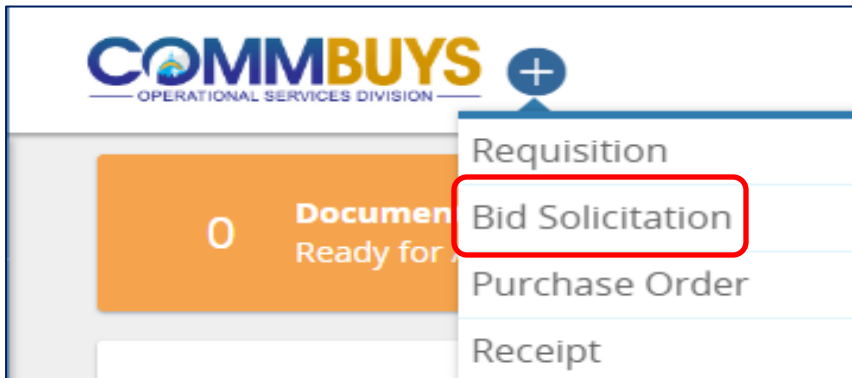
## Screenshot

## Directions



### Step 2: Selecting Bid Solicitation

1. When your COMMBUYS home page displays, click on the **Add Documents** blue and white plus sign icon.
2. Select **Bid Solicitation** from the dropdown menu.
3. Ensure that the radio button for **Create a bid from scratch** is selected then click on the **Continue** button.



### Step 3: Completing the General Tab Page

1. Fields to complete on the top portion of the page include:

**Description\*:** (upper right-hand side of the page) – Enter a description of the bid solicitation.

**NOTE:** This is a searchable field, so use unique language that would allow you to locate this transaction at a later time. This is also the headline for vendor notifications so it should be pertinent to vendors.

**Type Code:** (left side) - Using the dropdown arrow, select one of the following:

## Screenshot

## Directions

- **NS:** Bid for a non-statewide (departmental) solicitation
- **SS:** Bid for a statewide solicitation – for OSD use only.

**Department\*:** (left side) - Click on the down arrow next to the field and select the desired department.

**Location\*:** (left side) - Click on the down arrow next to the field and select the desired location.

The screenshot displays a form for creating a bid solicitation. The form is organized into two columns. The left column contains fields for 'Location\*', 'Show on Web' (checked), 'Required Date', 'Available Date\*' (with a calendar icon), 'Bid Type' (set to 'Open Bid'), 'Estimated Cost' (\$0.00), 'Alternate ID', and 'Purchase Method\*' (set to 'Open Market'). The right column contains fields for 'Organization' (Operational Services Division), 'Allow Electronic Response' (checked), 'Bid Opening Date\*' (with a calendar icon), and 'Informal Bid' (unchecked). Three red boxes highlight the 'Available Date\*', 'Bid Opening Date\*', and 'Purchase Method\*' fields.

**Available Date\*:** (left side) - 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 (using the slide bars).

**Bid Opening Date\*:** (right side) - 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\*:** (left side) – Ensure that **Open Market** is selected.

## Screenshot

## Directions

SBPP (Small Business Purchasing Program) Eligible?\*: NO

See SBPP requirements and exceptions at [www.mass.gov/sbpp](http://www.mass.gov/sbpp)

Procurement Type\*: World Trade Notification

CLM RFX ID:

Date Last Updated:

Save & Continue

Fields to complete on the bottom portion of the page include:

**SBPP (Small Business Purchasing Program) Eligible?\*** – If displayed, select **Yes** from the dropdown menu if the transaction will likely total \$250K or less annually. Select **No** if over \$250K or if not applicable.

**Procurement Type:** Use the dropdown menu to select **World Trade Notification**.

2. Click on the **Save and Continue** button. **NOTE:** A red validation error message displays **No Items**.

**NOTE:** COMMBUYS autogenerates an **Open Market Bid** number at the top of the page, the status displays as **In Progress**, and a **Create CLM RFX** hyperlink displays to the right of the **CLM\_rfx\_type** field at the bottom of the page.

SBPP (Small Business Purchasing Program) Eligible?\*: NO

See SBPP requirements and exceptions at [www.mass.gov/sbpp](http://www.mass.gov/sbpp)

Procurement Type\*: World Trade Notification

CLM RFX ID:

Date Last Updated: 07/06/2022 10:33:44 AM

Create CLM RFX

Save & Continue

3. Click on the **Create CLM RFX** hyperlink.
4. Click on the **OK** button in the popup box. **NOTE:** After a few seconds of processing, COMMBUYS autogenerates a **BIDPKG** number in the **CLM RFX ID** field.
5. Click on the **Save & Continue** button.
6. After a few seconds of processing, click on the **View** hyperlink next to the **BIDPKG** number in the **CLM RFX ID** field.

**NOTE:** You are now redirected into CLM in **Bid Package (Intent) Preparing** mode with a **BIDPKG** number at the top of the page

SBPP (Small Business Purchasing Program) Eligible?\*: NO

See SBPP requirements and exceptions at [www.mass.gov/sbpp](http://www.mass.gov/sbpp)

Procurement Type\*: World Trade Notification

CLM RFX ID: BIDPKG1667191 View


Date Last Updated: 07/06/2022 10:12:37 AM

Save & Continue


COMMBUYS CLM HOME MY LIST REPORTS CREATE Sea


**Bid Package (Intent) - Preparing**  
> BIDPKG1703284

**Sourcing Strategy Details**

**Document Number:**  

**Title:**

**Agency:**  *Agency Code does not match the Bid Package.*





























**Business Unit:**  *Business Unit does not match the Bid Package.*

#### Step 4: Completing the Sourcing Strategy Details Section

1. If you have created a Sourcing Strategy, click on the **magnifying glass search icon** next to the **Document Number** field.
2. When the Lookup Document Number page displays, identify the Sourcing Strategy in the **Form Number** column and click on the **circled arrow** in the **Select** column.
3. If you have not prepared a Sourcing Strategy, skip to the **Bid Package Details** section in Step 5.

Lookup - Document Number

Select an item by clicking the arrow to its left. View an item's details by clicking its link.

Select	Form Number	Document Number	Strategy Title	Sourcing Strategy Agency	Estimated Am
	 STIRGY1649411	DEMO-01	Catering for OSD Trainers for the year	Operational Services Division	1
	 STIRGY1649413	osd training	catering	Operational Services Division	1
	 STIRGY1649421	PGM10	Unusual Products	Operational Services Division	1
	 STIRGY1656142	ENG147	Enigmatic Products	Operational Services Division	1
	 STIRGY1659075	ENC01	Enchanted Products	Operational Services Division	1
	 STIRGY1666440	WTR100EP	SWC for Commercial and Recreational Water Craft	Operational Services Division	1
	 STIRGY1667076	TRN500	Training Services for Management, Leadership, and Business Tools	Operational Services Division	1
	 STIRGY1667320	test1111	Approval Test	Operational Services Division	1
	 STIRGY1667523	CTR100	Catering and Banquet Services for the Agency Department	Operational Services Division	1
	 STIRGY1667781	JATest1	Job Aid Review - RrO	Operational Services Division	1
	 STIRGY1689003	RrO - 007a	Training Approval Plan I	Operational Services Division	1
	 STIRGY1689346	MWC001	Marine Watercraft	Operational Services Division	1
	 STIRGY1700907	WTR01	Watercraft Products and Services	Operational Services Division	1
	 STIRGY1700942	JATest2	Job Aid Review 2 - RrO	Operational Services Division	1

## Screenshot

## Directions

**Bid Package Details**

COMMBUYS ID: BD-22-1080-OSD07-OSD07-75929

Predecessor Bid Package:

Title: WTR01 Commercial and Recreational Watercraft

Description / Scope: Commercial and recreational watercraft products and services.

Type: **\*\*(\*)\*\***  \*WTO \*

Agency: Operational Services Division - 1080

Business Unit: OSD TRAINING - OSD07

Contract Type: Blanket Purchase Agreement \*

Estimated Amount: 1,000,000.00

SWC #: WT001

Notice Type: ☒ Goods & Services ☐ Construction ☐ HHS/POS \*

### Step 5: Completing the Bid Package Details Section

1. If not auto filled, enter the title of the contract in the **Title** field.
2. If not auto filled, enter the contract description in the **Description/Scope** field.
3. The **Type** field displays **\*\*(\*)\*\*** in the left box and **WTO** in the right box.
4. Click on the **down arrow** in the **Contract Type** field and select **Blanket Purchase Agreement** from the dropdown menu.
5. If not auto filled, enter the expected amount of the contract in the **Estimated Amount** field.
6. Enter the contract number in the **SWC #** field. (OSD only)
7. Select the appropriate radio button in the **Notice Type** field.

**Goods and Services Details**

Purchase Type: Select Option

Select Option

Term

One Time

**Goods and Services Details**

Purchase Type: Term

Term Type: ☒ Dates ☐ Duration \*

Term Start Date: YYYY - MM - DD


Term End Date: YYYY - MM - DD

### Step 5: Completing the Goods and Services Details Subsection

1. If Goods & Services has been chosen in the Notice Type field above, click on the **down arrow** in the **Purchase Type** field and select **Term** from the dropdown menu.
2. Select the radio button for **Dates** in the **Term Type** field.
3. Enter the date that the contract will begin in the **Term Start Date** field.
4. Enter the date that the contract will end in the **Term End Date** field.


**NOTE:** The calendar icon can also be used to enter these dates.

### Bid Package Dates

Planned Contract Start Date: 12 - 29 - 2023 \* 

#### Timeline

Intent to Procure Date:	08	-	17	-	2023		
Issue Date:	08	-	24	-	2023		
Pre-Bid Conference Date:	09	-	06	-	2023		
Questions Acceptance Deadline:	09	-	10	-	2023		
Questions Answered Date:	09	-	12	-	2023		
Bid Amendment Deadline:	09	-	17	-	2023		
Online Bid Submission Training:	10	-	02	-	2023		
Closing Date:	10	-	22	-	2023		

Presentation for Selected Bidder(s): MM - DD - YYYY 

Announcement of Awarded Bidder(s): 12 - 07 - 2023 \* 

Final Negotiation Date: MM - DD - YYYY 

Completion of Online Catalogs: MM - DD - YYYY  

### Step 6: Completing the Bid Package Dates Section

If not auto filled, enter the start date of the contract in **Planned Contract Start Date** field. Most fields in the **Timeline** subsection will auto fill with a recommended schedule of dates. These dates are changeable. The following fields can be entered when appropriate but are not available for all contracts.

- **Presentation for Selected Bidders**
- **Final Negotiation Date**
- **Completion of Online Catalogs**

**NOTE:** The next section – **Bid Package Documents** requires no entry at this time. Go to **Step 7**.





**Statewide Contract Dates**


**Effective Date:** 12 - 29 - 2023 \* 

**Initial End Date:** MM - DD - YYYY 

**Renewal:** None ▼

**Renewal:** Options ▼

Option Period	Duration (months)	Start Date	End Date
1		MM - DD - YYYY 	MM - DD - YYYY 

+ [Add Row](#)  [Remove Row](#)

### Step 7: Completing the Statewide Contract Dates Section

**NOTE:** Despite the title, this section applies to non-statewide contracts as well.

1. If the **Effective Date** does not auto fill enter the beginning date of the contract.. Using the fields or the calendar icon, enter the **Initial End Date**.
2. In the **Renewal** field, if there are no renewals, leave the default as **None**.

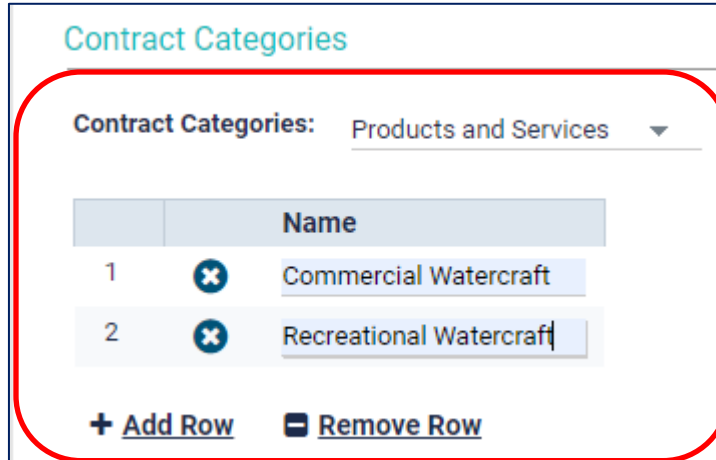
**NOTE:** Expiration dates on contracts may not be extended unless renewal options have been included in the Request for Response or Due Diligence Notice of Intent.

To add renewal information:

- Click on the **down arrow** next to the field and select **Options** from the dropdown menu. The **Option Period** column defaults to 1.
- Enter the **length of the renewal** in the **Duration (months)** column.

**NOTE:** Entering a number in this field will populate the next two fields.

- Enter the **Start Date** if not populating the Duration (months) field.
- Enter the **End Date** if not populating the Duration (months) field.
- Click on the **Add Row** hyperlink to add additional renewal periods.



**Contract Categories**

**Contract Categories:** Products and Services ▼

		Name
1	✕	Commercial Watercraft
2	✕	Recreational Watercraft

+ Add Row    - Remove Row

**Step 8: Completing the Contract Categories Section**


If the **Contract Categories** and **Name** fields do not auto fill, select the type of category from the dropdown menu in the **Contract Categories** field, and enter the name of the categories in the **Name** field. Use the **Add Row** feature if more than one category is being entered.

## Screenshot

## Directions

**Contacts**

Requestor: \_\_\_\_\_

Sourcing Manager: \_\_\_\_\_ \*Field is mandatory. 

**Lookup - Sourcing Manager**

Select an item by clicking the arrow to its left. View an item's details by clicking its link.

Select	Full Name ↑↓	Email Address ↑↓

**Filter By : Full Name**

\_\_\_\_\_

**OK** **CANCEL**

**Lookup - Sourcing Manager** x

Select an item by clicking the arrow to its left. View an item's details by clicking its link.

Select	First Name ↑↓	Last Name ↑↓	Email Address ↑↓
	Paul	Martin	paul.g.martin@mass.gov

**Contacts**

Requestor: \_\_\_\_\_

Sourcing Manager: **Paul Martin** \*Field is mandatory. 

### Step 9: Completing the Contacts Section.

1. Leave the **Requestor** field blank and click on the **magnifying glass** search icon next to the **Sourcing Manager** field
2. In the **Lookup – Sourcing Manager** popup screen, click on the **down (triangular) arrow** in the **Full Name** column.
3. Enter the desired name in the **Filter By: Full Name** popup screen and click on the **OK** button.
4. When the **Lookup – Sourcing Manager** popup screen re-displays, click on the **right arrow** in the **Select** column for the desired name.
5. When the page re-displays, the desired name will display in the **Sourcing Manager** field.
6. Click on the **SAVE** button at the bottom of the page.

RFR Document

Working Document

Document: [BIDPKG1667191 \(Template\)](#) [View PDF](#) [Upload Document](#)

Data Injection: ☒ YES ☐ NO

Comments:

edit, it's safer to stay in Protected View. [Enable Editing](#)

**OSD**  
OPERATIONAL SERVICES DIVISION  
Gary J. Lambert  
Assistant Secretary for Operational Services

The Commonwealth of Massachusetts  
Executive Office for Administration and Finance  
Operational Services Division  
Charles D. Baker, Governor  
Karyn E. Polito, Lieutenant Governor  
Michael J. Heffernan, Secretary

**Notice of Intent to Bid – [August 24, 2023]**  
[WTR01 Commercial and Recreational Watercraft]  
This is an announcement only.

This is a World Trade Organization (WTO) announcement only! Please do NOT contact the issuer with questions about the anticipated bid. Bidders are solely responsible to monitor COMMBUYS.com for amendments to this announcement and for complete bid posting.

The Commonwealth of Massachusetts through the Operational Services Division (OSD) intends to post a solicitation for a new contract, [WTR01 Commercial and Recreational Watercraft], and to require bid submission via COMMBUYS. This will replace the current contracts.

Before the solicitation is posted, interested bidders should also take advantage of educational opportunities offered through Operational Services Division on the bidding process.

1. [Operational Services Division Homepage](#)
2. [OSD Training & Outreach Courses](#)
3. [Supplier Diversity Office \(SDO\)](#)
4. [Supplier Diversity Program \(SDP\)](#)
5. [Environmentally Preferable Products \(EPP\)](#)

COMMBUYS UNSPSC CODES:	COMMBUYS UNSPSC CODE DESCRIPTIONS:
12-14-20-05	Helium gas
15-11-15-06	Acetylene
25-11-19	Marine Craft Systems and Subassemblies

RFR Document

Working Document

Document: [WTR01\\_BIDPKG1667191 \(Template\)](#) [View PDF](#) [Upload Document](#)

RFR Document

Working Document

Document: [WTR01\\_BIDPKG1667191\\_v1.docx](#) [Replace](#) [Remove](#)

Data Injection: ☒ YES ☐ NO

Comments:

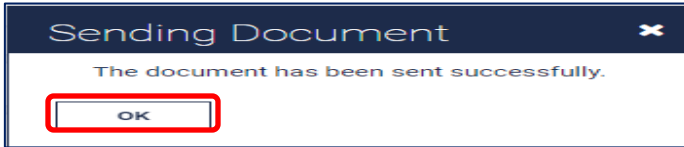
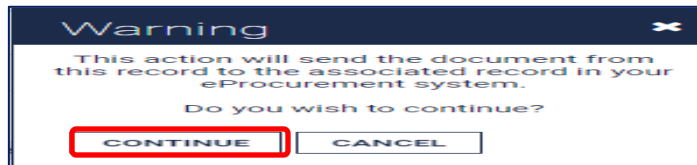
[SAVE](#) [SEND LETTER OF INTENT](#) [WITHDRAW](#) [COMPLETE](#) [Email](#) [Download](#) [Refresh](#)

### Step 10: Completing the RFR Document/Working Document Subsection

1. Click on the **Template** hyperlink in the **Document** field, then click on the **.docx** box that displays on the corner of your screen and open.
2. When the template displays, click on the **Enable Editing** button on the yellow stripe at the top, and review and edit the template wording as needed.
3. Scroll down to the **UNSPSC chart**, add the relevant **UNSPSC Codes** and **descriptions** to the table, then delete the rest.
4. When editing is complete click on **File** on the top task bar, then **Save As**, and click on the **Save** button.
5. Click on the **X** at the top right of the Notice of Intent page to close it.
6. When the page redisplay, click on the **Upload Document** hyperlink.
7. Select the edited and renamed NOI document from the saved location popup screen then click on the **Open** button on the popup screen. The edited and renamed document now appears in the **Document** field.
8. The **Data Injection** field defaults to **Yes** which is the recommended default.
9. Enter comments in the **Comments** field if desired, then click on the **SAVE** button at the bottom of the page. This hyperlinks the NOI in the **Documents** field.
10. Click on the **SEND LETTER OF INTENT** button at the bottom of the page.

## Screenshot

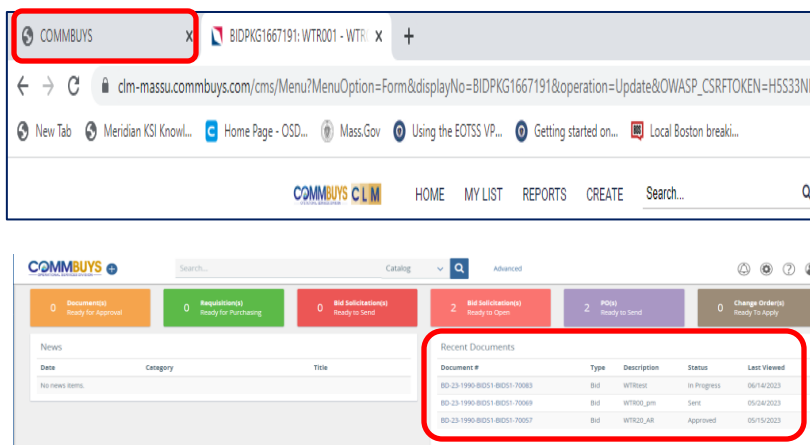
## Directions



11. Click on the **CONTINUE** button on the **Warning** popup screen.

12. After a few moments of processing, click on the **OK** button on the **Sending Document** popup screen.

**NOTE:** At this point, you will return to **COMMBUYS** to reopen the bid.



### Step 11: Reopening the Bid in COMMBUYS

1. Click on the **COMMBUYS** tab at the top of the screen. If your Bid displays, go to **Step 12**.
2. If not, click on the COMMBUYS logo to display your COMMBUYS homepage.
3. Click on the **Bid Solicitation** hyperlink in the **Document #** column of the **Recent Documents** section. The bid opens to the **Summary** tab page.

## Screenshot

## Directions

### Step 12: Completing the Items Tab

**NOTE:** If the Notice of Intent was successfully sent, the **Attachments** tab displays a **(1)** indicating that the NOI was received by COMMBUYS when sent from CLM.

1. Click on the **Items** tab.

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

3. Enter a description of the bid in the **Description** field. **NOTE:** If you have multiple categories, enter the name of the first category.

4. Select the **Disable Pricing on Quote** checkbox.

5. Change the **Quantity** field to **1.0**.

6. Enter the 4-digit UNSPSC (United Nations Standard Products and Services Code) in the **UNSPSC Segment-Family** field.

**NOTE:** This code can be searched for by clicking on the **magnifying glass search icon**.

7. Enter the 2-digit UNSPSC Class code in the **UNSPSC Class** field.

8. If you have additional items, click on the **Save & Add New** button; otherwise click on the **Save & Exit** button.

Open Market Bid BD-22-1080-OSD07-OSD07-75929

General **Items** Address Accounting Routing Attachments(1) Notes Bidders Questions Amendments Q & A Reminders Summary

**Overall Validation Errors**

No Items.

Open Market Bid BD-22-1080-OSD07-OSD07-75929

General **Items** Address Accounting Routing Attachments(1) Notes Bidders Questions Amendments Q & A Reminders Summary

General Address Accounting Attachments Notes Questions

There are no items. Please click "Search Items" or "Add Item" below to add an item.

Search Items **Add Item** Upload Items Export Items

Open Market Bid BD-22-1080-OSD07-OSD07-75929

General **Items** Address Accounting Routing Attachments(1) Notes Bidders Questions Amendments Q & A Reminders Summary

General Address Accounting Attachments Notes Questions

Item #: Item Type: Normal

Print Sequence: 1.0 Item Status: 281 - In Progress

Description: Commercial watercraft products and services.

Disable Pricing On Quote: ☒ Quantity: 0.0 Unit Cost: 0.00 Net Unit Cost: \$0.00 UOM: EA

UNSPSC Segment-Family: 25-11 25-11 - Marine transport

UNSPSC Class: 15 15 - Commercial marine craft

Commodity-EPP:

Additional product information

Save & Add New Save & Exit Save & Continue Reset Cancel & Exit

## Screenshot

## Directions

### Step 13: Completing the Bidders Tab

1. Click on the **Bidders** tab.
2. Click on the **Lookup & Add Vendors** button on the bottom of the page.
3. Scroll to the bottom of the **Lookup & Add Reference Vendors** popup screen and click on the **Find Vendors for All Commodity-EPPs on the Bid** button.
4. Select all Vendors by clicking on the **Select** checkbox at the top of the **Select** column. **NOTE:** This is the recommended best practice.
5. Click on the **OK** button in the popup box.
6. Click on the **Save & Exit** button at the bottom of the page. **NOTE:** The page re-displays with the list of selected vendors.
- 7.

Open Market Bid BD-22-1080-OSD07-OSD07-75929

General **Items** Address Accounting Routing Attachments(1) Notes **Bidders** Questions Amendments Q & A Reminders Summary

General Address Accounting Attachments Notes Questions

Open Market Bid BD-22-1080-OSD07-OSD07-75929

General Subcontractors Quote Activity **Bidders** Questions Amendments Q & A Reminders Summary

**Vendor Validation Warnings**  
No bid bidder.

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

Vendor ID Vendor Name Vendor Address

☐ Show Estimated Total To Vendors

☐ Show Unit Prices to Vendors

☒ Hide Bid Holder List on Vendor Side

Before you look up bid vendors or add a new vendor, please save your unsaved changes. Otherwise you will lose those changes.

Save & Continue **Lookup & Add Vendors**

COMMBUYS | UAT - Lookup Vendors - Google Chrome

test.commbuys.com/bso/bid/lookupBidVendors.sdo?external=true&docId=BD-22-1080-OSD07-OSD07-75929&parentUrl=%2Fbso%2Fbid%2FbidBidd...

DUNS Number Business Enterprise (for profit) Non-Profit Organization

Environmentally Preferable Product This is the DUNS number assigned to my Business

Geographical Service Area in Massachusetts Western Massachusetts Central Massachusetts

Prompt Pay Discount No Yes

Supplier Diversity and Small Business Status Disability-Owned Business Enterprise (DOBE) LGBT-owned Business Enterprise (LGBTBE)

Program ☐ Small Business Purchasing Program

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 10

Find It Clear

**Find Vendors for All Commodity-EPPs on the Bid** Close Window

Lookup & Add Reference Vendors - Bid BD-22-1080-OSD07-OSD07-75929

**Vendor Lookup**

Select

Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date
<input type="checkbox"/>	00039150	All American Marine, Inc.			Jun 19, 2019
<input type="checkbox"/>	00012129	Apollo Fishing LLC			May 28, 2015
<input type="checkbox"/>	00049894	Armstrong Consolidated LLC			
<input type="checkbox"/>	00012981	Armstrong Marine, Inc.			
<input type="checkbox"/>	00048227	Artisan Boatworks			Jun 28, 2022
<input type="checkbox"/>	00002105	ATLANTIC BOATS INC		Jun 28, 2022	Jun 27, 2022

www.test.commbuys.com says

Warning: All vendors have been selected for email notification. A large quantity of vendors may take several minutes to process.

**OK**

## Step 14: Completing the Summary Tab

1. Click on the **Summary** tab.
2. Click on the **Submit for Approval** button at the bottom of the page.
3. Click on the **Save & Continue** button. **NOTE:** The status changes from **In Progress** to **Ready for Approval**.
4. After approval is received, log back into COMMBUYS and click on the red **Bid Solicitation(s) Ready to Send** tile box.
5. Click on the blue hyperlink for the desired bid in the **Bid Solicitation#** column. The bid opens to the **Summary** page.
6. In the **Send Bid Actions** section at the bottom of the page, ensure that the radio button for **Change bid status to "Sent" and notify vendors** is selected,
7. Click on the **Send Bid** button. The bid will be sent on the previously-set Bid Available Date.
8. When the list of vendors displays, click on the **OK** button at the bottom of the page.  
**NOTE:** The status changes to **Sent**.

**Now, click on the BIDPKG tab at the top of the page to return to the CLM BIDPKG.**

Item # 2: Recreational watercraft products and services 2BI - In Progress

UNSPSC Code: 25-11-18  
Recreational watercraft

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

Manufacturer: Brand: Model:

Make: Packaging:

Product Length: Product Width: Product Height:

UPC/ISBN: SKU:

Tags: URL:

Account Code

There is no item accounting available for this item.

**Submit for Approval** Cancel Bid Clone Bid Print

COMMBUYS+  
OPERATIONAL SERVICES DIVISION

Search... Catalog

0 Document(s)  
Ready for Approval

0 Requisition(s)  
Ready for Purchasing

**1 Bid Solicitation(s)  
Ready to Send**

Bid Solicitations

In Progress Ready for Approval Returned **Ready to Send** Sent Ready to Open Opened Evaluated

Bid Solicitation #	Description
<b>BD-22-1080-OSD07-OSD07-75929</b>	WTR01 Commercial and Recreational Watercraft

Send Bid Actions

Option(s) ☒ Change bid status to "Sent" and notify vendors ☐ Change bid status to "Sent" only.

**Send Bid**

Cancel Bid Clone Bid Print

00048227	Artisan Boatworks	Alec Brainerd (test@periscopeholdings.com)
00002651	Smith Marine, Inc.	Matthew Plauche (test@periscopeholdings.com)
00039273	Metal Shark Franklin, dba Metal Shark	Leigh Noel (test@periscopeholdings.com)
00049894	Armstrong Consolidated LLC	Alasun Schrecengost (test@periscopeholdings.com)
00052676	Inshore Boat Shop, Inc.	Valerie Knott (test@periscopeholdings.com)
00010723	Niemiec Marine, Inc.	Bradford Niemiec (test@periscopeholdings.com)
00003642	CODE ALPHA DIVERS, LLC	STEVE CASSIDY (test@periscopeholdings.com)

**OK**



## Screenshot

## Directions

**Bid Package Details**

COMMBUYS ID: BD-22-1080-OSD07-OSD07-75929

Predecessor Bid Package:  Q

Title: WTR01 Commercial and Recreational Watercraft \*

Description / Scope:  Commercial and recreational watercraft products and services. \*

Type: \*\*(\*)\*\* ▼ \* WTO \*

Agency: Operational Services Division - 1080

Business Unit: OSD TRAINING - OSD07

Contract Type: Blanket Purchase Agreement ▼ \*

Estimated Amount: 1,000,000.00

SWC #: WTR01

Notice Type: ☒ Goods & Services ☐ Construction ☐ HHS/POS \*

### Step 15: Completing the Bid Package Details Section

1. Click on the down arrow in the **Type** field containing the asterisks and select **Request for Response** from the dropdown menu.
2. Click on the **SAVE** button at the bottom of the page.

**NOTE:** Now that the WTO Notice of Intent has been posted, it will ultimately be superseded with the Bid Solicitation (RFR). The following steps address replacing the WTO Notice of Intent with the RFR beginning in the RFR Document section.

## Step 16: Completing the RFR Document/Working Document Subsection

1. Go to the RFR/Working Document subsection and click on the checkbox next to **Remove**.
2. Click on the **SAVE** button at the bottom of the page, then click on the **COMPLETE** button at the bottom of the page. This will remove the prior WTO NOI document and replace it with the RFR template.
3. Click on the Template hyperlink, then click on the **.docx** box on the corner of your screen and open.
4. When the document displays, click on the **Enable Editing** button and edit the template.
5. After editing, click on **File** and **Save As**.
6. Click on **Save**.
7. Click on the **X** at the top right of the screen to close the document.
8. When the page re-displays, click on the **Upload document** hyperlink.
9. Select the edited RFR document from the popup screen and click on the **Open** button. The edited document title now displays in the Document field.
10. Click on the **Save** button at the bottom of the page.

**RFR Document**

**Working Document**

Document: RFR-WTR00\_pm\_1.docx [Replace](#) [Remove](#)

Data Injection: ☒ YES

Comments:

**Working Document**

Document: [BIDPKG1667191 \(Template\)](#) [View PDF](#) [Upload Document](#)


It's safer to stay in Protected View. [Enable Editing](#)

**COMMONWEALTH OF MASSACHUSETTS  
OPERATIONAL SERVICES DIVISION  
Request for Response (RFR)**

**WTR01 Commercial and Recreational Watercraft**

**Operational Services Division**  
1080  
OSD TRAINING

**BD-22-1080-OSD07-OSD07-75929**  
08-24-2023



Please Note: This is a single document associated with a complete Bid (also referred to as Solicitation) that can be found on [www.COMMBUYS.com](http://www.COMMBUYS.com). Bidders are responsible for reviewing and complying with all Bid requirements. Bidders may contact the OSD Help Desk at [COMMBUYS@mass.gov](mailto:COMMBUYS@mass.gov) or at 1-888-MA-STATE for technical assistance with COMMBUYS. The Help Desk is staffed from 8:00 AM to 5:00 PM Monday through Friday Eastern time, as applicable, except on [federal and state holidays](#).  
Bidders with disabilities or hardships that seek reasonable

**Save As**

Recent

Commonwealth of Massachusetts

Downloads

WTR01\_RFR\_v1

Word Document (\*.docx)

[More options...](#)

[Save](#)

**RFR Document**

**Working Document**

Document: [BIDPKG1667191 \(Template\)](#) [View PDF](#) [Upload Document](#)

**Open**

This PC > Downloads

Organize New folder

Name	Date modified	Type	Size
Camping Vendo			
CLM			
ERF_2018			
Telecommute PI			
OneDrive - Comm			
This PC			
3D Objects			
Desktop			
Documents			
Downloads			
Music			
Pictures			
Videos			
Windows (C:)			
Shared Files (\v)			
eprocurement (\v)			




File name: WTR01\_RFR\_v1


[Open](#) [Cancel](#)


## Screenshot



## Directions


Working Document Collaboration

Status: **Not Started**   

Due Date: MM - DD - YYYY  Comments:

Send Reminders: YES ☒ 

External User	Name	Email	Permission ?	Status
	<input type="text"/>	 <input type="text"/>	Select Option ▼	Not Started ▼

+ Add Row  Remove Row

### Step 17: Completing the Working Document Collaboration Subsection

**NOTE:** At various stages in the **Contract Lifecycle Management** process, collaboration occurs among members of Strategic Sourcing Teams (SSTs).

1. The Status **Not Started** displays. Enter a date that collaboration comments will be due in the **Due Date** field.
2. Enter comments about the collaboration in the **Comments** text box if applicable.
3. Ensure that **YES** displays in the **Send Reminders** field. **NOTE:** Reminders will be sent 7 days and 2 days prior to those collaborators who have not completed the collaboration.

**NOTE:** Collaborators can include users who are either external or internal to your work group.


- To add an external collaborator, go to **Step 18**.
- To add an internal collaborator, go to **Step 19**.

Working Document Collaboration

Status: Not Started [EDIT](#) [SHARE](#) ?

Due Date: MM - DD - YYYY [Comments](#)

Send Reminders: YES ☒ ?

External User	Name	Email	Permission ?	Status
	<input type="text"/>	<input type="text"/>	Select Option ▼	Not Started ▼

[+ Add Row](#) [Remove Row](#)

**Permission** ?

Select Option ▼

- Select Option
- Edit
- Comment
- Read Only

**Status**

Not Started ▼

- Not Started
- Shared
- Completed
- Not Completed

### Step 18: Adding an External Collaborator

1. Select the **External User** checkbox.
2. Enter the collaborator's **Name** and **Email** address in the respective fields.

**NOTE:** The collaborator can be removed by clicking on the blue and white X icon at the beginning of the row. Additional users can be added by clicking on the **Add Row** hyperlink at the bottom of the subsection.

3. Click on the **down arrow** in the **Permission** column and select:
  - **Edit** - if the user will have the ability to edit the document.
  - **Comment** – if the user cannot edit the document but can enter comments about it.
  - **Read Only** – if the user can review the document but cannot edit or enter comments.

**NOTE:** The Status column displays **Not Started** for each user prior to the start of the collaboration.

**Go to Step 19 to add internal collaborators, otherwise go to Step 20.**

## Screenshot


## Directions

### Step 19: Adding an Internal Collaborator

1. Click on the **magnifying glass** search icon.
  2. In the **Lookup – Collaborator Name** popup box, click on the down **triangle** in the **Full Name** column.
  3. In the **Filter By: Full Name** popup box, enter the collaborator's name, then click on the **OK** button.
  4. When the **Lookup – Collaborator Name** popup box re-displays, click on the **right arrow** in the **Select** column.
- NOTE:** Do not click on the USER hyperlink in the Form Number column.
5. The selected internal collaborator's **Name** and **Email** address now display in the respective fields.

**NOTE:** The collaborator can be removed by clicking on the blue and white X icon at the beginning of the row. Additional users can be added by clicking on the **Add Row** hyperlink at the bottom of the subsection.

**CONTINUED ON NEXT PAGE.**

Name	Title	Status	Due Date	Notes
		Not Required	MM - DD - YYYY	

Lookup - Collaborator Name[1]

Select an item by clicking the arrow to its left. View an item's details by clicking its link.

Select	Form Number	Full Name	Email Address


Filter By : Full Name

**OK** **CANCEL**

Lookup - Collaborator Name[1]

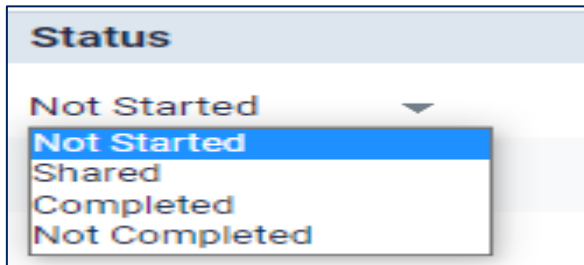
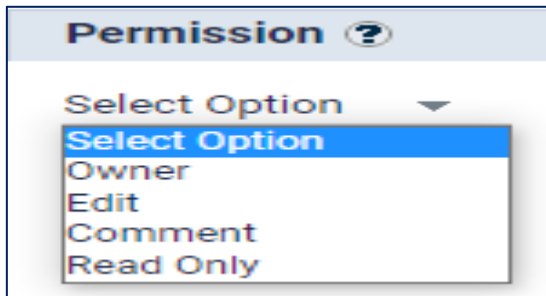
Select an item by clicking the arrow to its left. View an item's details by clicking its link.

Select	Form Number	Full Name	Email Address
	USER1645611	Renee O'Rourke	renee.orourke@mass.gov

External User	Name	Email	Permission ?	Status
	Renee O'Rourke	renee.orourke@mass.gov	Select Option	Not Started

+ Add Row Remove Row

## Screenshot



## Directions

6. Click on the **down arrow** in the **Permission** column and select:
- **Owner** - if the user selected will be an owner of the document.
  - **Edit** - if the user will have the ability to edit the document.
  - **Comment** – if the user cannot edit the document but can enter comments about it.
  - **Read Only** – if the user can review the document but cannot edit or enter comments.

**NOTE:** The Status column displays **Not Started** for each user prior to the start of the collaboration.

**Step 20: Starting the Collaboration Process**

1. Click on the **EDIT** button. When you do, your name is added to the list of collaborators and the document displays.

Working Document Collaboration

Status: Not Started **EDIT** **SHARE** ?

Due Date: MM - DD - YYYY Comments:

Send Reminders: YES ☒ ?

External User	Name	Email	Permission ?	Status
<input type="checkbox"/>			Select Option	Not Started

+ Add Row Remove Row

Tasks

0 Tasks **New Task**

Type task here. You can highlight a text area in the document to link to your task.

Assigned To: Renee O'Rourke

**Create Task** Cancel

Tasks

1 Tasks **New Task**

Status Assignee

To: Renee O'Rourke / By: Paul Martin  
4/29/2022 11:28 AM

Assigned

Task: Please edit.

Add Reply

COMPLETE REVIEW **SHARE DOCUMENT** **GO TO RECORD**

Working Document Collaboration

Status: Draft **EDIT** **SHARE** ☒ COMPLETE ☒ CANCEL ?

Due Date: 06 - 29 - 2022 Comments:

Send Reminders: YES ☒ ?

External User	Name	Email	Permission ?	Status
<input checked="" type="checkbox"/>	Renee O'Rourke	renee.orourke@mass.gov	Edit	Not Started
<input checked="" type="checkbox"/>	Paul Martin	paul.g.martin@mass.gov	Owner	Not Started

+ Add Row Remove Row

2. Click on the **New Task** button on the left side of the page.
3. When the New Task section redisplay, click in the **text box** and enter a task.
4. Click on the **down arrow** in the **Assigned To:** field and select a collaborator for the assigned task.
5. Click on the **Create Task** button.

**NOTE:** The **New Task** screen re-displays with the entered information.

6. Click on the **GO TO RECORD** button at the bottom of the page to return to the **Working Document Collaboration** subsection. The status is **Draft**.
7. Click on the **SHARE** button.

## Screenshot

## Directions

Working Document Collaboration

Status: Shared EDIT REPLACE WORKING DOCUMENT ✓ COMPLETE CANCEL NOTIFY SHARED COLLABORATORS ?

Due Date: 06 - 29 - 2022 Comments:

Send Reminders: YES ☒ ?

2 collaborators | 0 currently online

External User	Name	Email	Permission ?	Status
<input checked="" type="checkbox"/>	Renee O'Rourke	renee.orourke@mass.gov	Edit ▼	Shared ▼
<input checked="" type="checkbox"/>	Paul Martin	paul.g.martin@mass.gov	Owner ▼	Shared ▼

+ Add Row Remove Row

Completing Collaboration ✕

If the document contains redlines and/or comments, they will be retained in the working document if they are not resolved.

OK CANCEL

Working Document Collaboration

Status: Completed EDIT SHARE ?

Due Date: 06 - 29 - 2022 Comments:

Send Reminders: YES ☒ ?

External User	Name	Email	Permission ?	Status
<input checked="" type="checkbox"/>	Renee O'Rourke	renee.orourke@mass.gov	Edit ▼	Completed ▼
<input checked="" type="checkbox"/>	Paul Martin	paul.g.martin@mass.gov	Owner ▼	Completed ▼

+ Add Row Remove Row

- When collaboration is completed, click on the **COMPLETE** button.

**NOTE:** It is important to ensure that redlines and comments are resolved at this stage in the process prior to clicking on the OK button.

- Click on the **OK** button in the **Completing Collaboration** popup box.

- The status changes to **Completed**.



## Step 21: Accessing the Package Documents Tab

1. Click on the **Package Documents** tab near the top of the page.

2. Click on the **NEW** button.

3. In the Document Type field, click on the **down arrow** next to **Select Option**, and select the desired document.

4. Add notes if desired.

5. Click on the **down arrow** next to the **Include with Vendor Contract** field and select **Yes** from the dropdown menu for documents to be included with the vendor contract.

6. Click on the **SAVE** button at the bottom of the page.

7. Click on the **Upload Document** hyperlink and select the attachment from its location on your computer.

8. Click on the **SAVE** button at the bottom of the page, edit as needed, then click on the **VERIFIED** button at the bottom of the page. Repeat this process for each attachment.

9. Click on the **BIDPKG** hyperlink at the top of the page to leave the Package Documents tab and return to the Bid Package.

COMMBUYS C L M HOME MY LIST

**Bid Package (Draft)**  
 > STRTGY1667145 > BIDPKG1667191

Bid Packages **Package Documents**

COMMBUYS C L M HOME MY LIST REPORTS CREATE Search...

**Bid Package Package Documents**  
 STRTGY1667145

Bid Packages Package Documents

Form Form Type Revision Signed

**NEW** REFRESH

COMMBUYS C L M HOME MY LIST REPORTS CREATE Search...

**Package Document**

Package Document Information

**Document Type:** Select Option

Date Verified: Bidder Response Form  
 Bidder Response Checklist  
 Price File Template  
 Prompt Pay Discount  
 Supplier Diversity Plan (SDP) Form  
 Vendor Current Environmentally Preferable Practices (EPP) Form  
 Evaluation Criteria  
 Standard Contract Form  
 Standard Contract Form Instructions and Contractor Certifications  
 Commonwealth Terms and Conditions for Information Technology Contracts  
 W-9  
 Bidder Q&A  
 Authorized Signatory Listing (CASL)  
 Job-Aide - How to Create a Quote in COMMBUYS  
 Other

Notes:

Include with Vendor Contract:

Tasks

Notes & Attachments

COMMBUYS C L M HOME MY LIST REPORTS CREATE Search...

**Package Document**

Package Document Information

**Document Type:** Prompt Pay Discount

Date Verified:

**Notes:**

**Include with Vendor Contract:** Select Option

Tasks

Notes & Attachments

**SAVE**

Contract Document

Contract Source: Standard

Working Document

Current Working Document: PKGDOC1472558-0001 (Template) View PDF **Upload Document**

Package Document (Prepare)  
 > STRTGY1667145 > BIDPKG1667191 > PKGDOC1667191-0001

Package Document Information

**Document Type:** Prompt Pay Discount

Date Verified:

**Notes:**

**Include with Vendor Contract:** Yes

Contract Document

Contract Source: Standard

**SAVE** VERIFIED WITHDRAW

COMMBUYS C L M HOME MY LIST REPORTS

**Package Document (Verified)**  
 > STRTGY1667145 > **BIDPKG1667191** > PKGDOC1667191-0001

## Screenshot

## Directions

### Step 22: Completing the Approvers Section

1. For sequential approvals, select **Serial** from the dropdown menu in the **Approval Method** field. For Simultaneous approvals, select **Parallel**.
2. Click on the **magnifying glass** search icon in the **Submitted For Approval By** field.
3. When the Lookup-Approver Name popup box displays, select the **right arrow** in the **Select** column next to the desired approver.
4. Enter notes, if desired, in the **Notes** text box.
5. Click on the **Add Row** hyperlink if you wish to add additional approvers.

**NOTE:** ACPO Approval, Agency Head Approval, and CCPO Approval fields are optional fields that can be used if part of your organizational approval process.

Approvers

Approval Method: Serial

Submitted For Approval By:

Name	Title	Status	Due Date	Notes
		Not Required	MM - DD - YYYY	

+ Add Row Remove Row

Legal Approval: Required

ACPO Approval: Not Required

Agency Head Approval: Not Required

Lookup - Approver Name[1]

Select an item by clicking the arrow to its left. View an item's details by clicking its link.

Select	First Name	Last Name	Title	Email Address
	COMMBUYS	Training	COMMBUYS Training	commbuystraining@mass.gov

Name	Title	Status	Due Date	Notes
COMMBUYS Training	COMMBUYS Training	Required	08 - 09 - 2022	

+ Add Row Remove Row

Legal Approval: Required

ACPO Approval: Not Required

Agency Head Approval: Not Required

CCPO Approval: Not Required

## Screenshot

## Directions

**Legal**

**Name:** \_\_\_\_\_

**Due Date:** MM - DD - YYYY

**Notes:**

Lookup - Legal Approver

Select an item by clicking the arrow to its left. View an item's details by clicking its link.

Select	First Name	Last Name	Title	Email Address
	MASS	Legal Approver		mbusby@test2.ascontracts.com
	QA MASS	Legal Approver		mbusby@test2.ascontracts.com
	Wick	Webber	Devops	wick.webber@mdfcommerce.com
	Marianne	Eid	BA	marianne.eid@mdfcommerce.com
	Donna	Webster	BA	donna.webster@mdfcommerce.com
	Rajiv	Singh	Technical Lead	rajiv.singh@mass.gov
	Legal	Approver	Legal Approver	OSD-CLM-LA@mass.gov
	Brian	Smith	BA	brian.smith@mdfcommerce.com
	Nicole	St. Pierre	Legal, Policy and Compliance	nicole.st.pierre@mass.gov
	Marianne	Eid	BA	test@periscopeholdings.com
	Remi	Harrison	Performance Analytics Intern	remi.harrison@mass.gov
	Matthew	Chester	COMMBUYS Help Desk Specialist	matt.chester@mdfcommerce.com
	CLM	User	Contract Manager	clmuser@phimail.mallinator.com
	CloudQA	Multi-role User	CloudQA Multi-Role User	CLMtest2@mailinator.com
	COMMBUYS	Training	COMMBUYS Training	commbuystraining@mass.gov

Viewing 1 - 15 of 15

### Step 23: Completing the Legal subsection

1. Click on the **magnifying glass** search icon.
2. When the **Lookup – Legal Approver** popup screen displays, select the **right arrow** in the **Select** column next to the name of the legal approver.
3. Click on the **SAVE** button at the bottom of the page.
4. Click on the **SUBMIT FOR APPROVAL** button at the bottom of the page.

## Screenshot

## Directions

**Bid Package (Approved)**  
 > STRTGY1667145 > BIDPKG1667191

Bid Packages | Package Documents

**Sourcing Strategy Details**

Document Number: WTR001  
 Title: Commercial and Recreational Watercraft  
 Agency: Operational Services Division - 1080 ⚠️ *Agency Code does not match the Bid Package.*  
 Business Unit: Operational Services Division - OSD01 ⚠️ *Business Unit does not match the Bid Package.*

**Bid Package Details**

COMMBUYS ID: BD-22-1080-OSD07-OSD07-75929  
 Predecessor Bid Package: WTR01  
 Title: WTR01 Commercial and Recreational Watercraft  
 Description / Scope: Commercial and recreational watercraft products and services.  
 Type: Request for Response  
 Agency: Operational Services Division - 1080  
 Business Unit: OSD TRAINING - OSD07  
 Contract Type: Blanket Purchase Agreement  
 Estimated Amount: 1,000,000.00  
 SWC #: WTR01  
 Notice Type: ☒ Goods & Services ☐ Construction ☐ HHS/POS  
**Goods and Services Details**  
 Purchase Type: Term  
 Term Type: ☒ Dates ☐ Duration

SAVE SEND BID WITHDRAW

**NOTE:** The status changes to **Pending Approval**. After approval is received from the sourcing manager, the status changes to **Pending Legal Approval**. After legal approval, the status changes to **Approved**.

- After legal approval is received, return to the **BIDPKG** and click on the **SEND BID** button on the bottom of the page.

**Warning**

This action will send the document from this record to the associated record in your eProcurement system.

Do you wish to continue?

CONTINUE CANCEL

- Click on the **Continue** button in the **Warning** popup screen.

**Sending Document**

The document has been sent successfully.

OK

- After the request is processed, click on the **OK** button in the **Sending Document** popup screen.

**Bid Package (Ready to Post)**  
 > STRTGY1667145 > BIDPKG1667191

- NOTE:** The status changes to **Ready to Post**. No further action is required in CLM.

Now return to the bid in **COMMBUYS**.

Open Market Bid BD-22-1080-OSD03-OSD03-76004

General Items **Address** Accounting Routing Attachments Notes Bidders Questions Amendments Q & A Reminders Summary

Ship-to Address Q Bill-to Address Q

OSD07 - OSD TRAINING

OSD Training  
1 Ashburton Place  
Suite 1017  
Boston, MA 02108  
US  
Email: test@periscopeholdings.com  
Phone: (123)456-7890

OSD07 - OSD TRAINING

OSD Training  
1 Ashburton Place  
Suite 1017  
Boston, MA 02108  
US  
Email: test@periscopeholdings.com  
Phone: (123)456-7890

Save & Continue Apply Ship-to to All Items Apply Bill-to to All Items

Lookup Ship-to Address - Open Market Bid BD-22-1080-OSD03-OSD03-76004

Search Using: ALL of the criteria

Search Fields:

Department ID		Department Name	
Department Suffix ID		Department Suffix Name	
Location ID		Location Name	
City		County	

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

Find It Clear

Close Window

<input checked="" type="radio"/>	OSD09	OSD OVM	OVMW	OSD OVM/Westborough	OSD OVM / Tim Morrissey OSD OVM / Westborough Office 288 Lyman Street Westborough, MA 01581 US Email: test@periscopeholdings.com Phone: (123)456-7890
<input type="radio"/>	OSD10	OSD HRA	HRAAP	OSD HRA AP	Accounts Payable 1 Ashburton Place Room 1017 Boston, MA 02108 US Email: test@periscopeholdings.com Phone: (123)456-7890

1-25 of 40  
1 2

Select Close Window

Open Market Bid BD-22-1080-OSD03-OSD03-76004

General Items **Address** Accounting Routing Attachments Notes Bidders Questions Amendments Q & A Reminders Summary

**Confirmation Messages**  
Changes saved successfully.

Ship-to Address Q Bill-to Address Q

OVMW - OSD OVM/Westborough

OSD OVM / Tim Morrissey  
OSD OVM / Westborough Office  
288 Lyman Street  
Westborough, MA 01581  
US  
Email: test@periscopeholdings.com  
Phone: (123)456-7890

OSD07 - OSD TRAINING

OSD Training  
1 Ashburton Place  
Suite 1017  
Boston, MA 02108  
US  
Email: test@periscopeholdings.com  
Phone: (123)456-7890

Save & Continue Apply Ship-to to All Items Apply Bill-to to All Items

### Step 24: Completing the COMMBUYS Address Tab

**NOTE:** The General and Items tab information carries over from the Notice of Intent phase (if activated). Changes may be made if needed. If the default Ship-to or Bill-to address do not need to be changed, go on to **Step 25**.

If changes need to be made to the default Ship-to or Bill-to address:

1. Click on the **magnifying glass** search icon.
2. Click on the **Find It** button on the **Lookup Ship-to Address** popup screen.
3. Select the **radio button** in the **Select** column next to the desired address.
4. Click on the **Select** button at the Bottom of the page.
5. Click on the **Save & Continue** button.

**NOTE:** The Accounting tab is not used. The Routing tab displays your approval path when submitting documents. The Attachments tab will contain any documents previously sent over from CLM (i.e. Letter of Intent; RFR).

## Screenshot

## Directions

Open Market Bid BD-22-1080-OSD03-OSD03-76004

General Items Address Accounting Routing Attachments **Notes** Bidders Questions Amendments Q & A Reminders Summary

Delete All	Note Date	User	Note
<input type="checkbox"/>		Paul Martin	

Save & Continue Reset

### Step 25: Completing the Notes Tab

1. If desired, enter notes in the box in the **Note** column next to your Username.
2. When finished, click on the **Save & Continue** button.

**NOTE:** These notes can be seen by you and others assigned to your work group by your COMMBUYS Organization Administrator. Vendors cannot see these notes. However, please be aware that anything entered in the COMMBUYS system is subject to Freedom of Information Act (FOIA) requests from vendors, the media, and the public at large.

**NOTE:** The Bidders tab carries over from the Notice of Intent/RFR phase.

Open Market Bid BD-22-1080-OSD03-OSD03-76004

General Items Address Accounting Routing Attachments Notes Bidders **Questions** Amendments Q & A Reminders Summary

Delete All	Question #	Print Sequence	Required	Question	Response Type
<input type="checkbox"/>	0	10	<input type="checkbox"/>		Availability response

Save & Continue Reset

### Step 26: Completing the Questions Tab

1. Select the **Required** checkbox if you would like to ask a question that vendors will be required to answer.
2. Enter your question in the **Question** box.
3. You can determine the length and type of vendor response by clicking on the down arrow next to the **Availability Response** field and choosing one of the menu options.
4. Click on the **Save & Continue** button when finished.

Response Type

Availability response

Availability response

Average rating - poor to excellent

Comment response - extended text

Rating scale from 1 to 10

Rating scale from 1 to 5

Basic text response

True or False Response

Yes or No Response

**NOTE:** At this point, skip over the **Amendments** tab and return to it in **Step 29**.

## Screenshot

## Directions

Open Market Bid BD-22-1080-OSD03-OSD03-76004

General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments **Q&A** Reminders Summary

Question #	Created Date	User Created	Question Subject	Question	Answer	Show All on Web	Show Original Vendor Only	Delete All
Add New:								

☒ Allow vendor to submit questions  
☒ Send notification when vendor submitting question  
 Close Q&A For Vendor Date

**Save & Continue** **Reset**

### Step 27: Completing the Q&A Tab

1. Select the **Allow vendor to submit questions** checkbox.
2. Select the **Send notification when vendor submitting question** checkbox.
3. If desired, the question period allotted to vendors can be set using the **calendar icon** in the **Close Q&A For Vendor Date** field.
4. Click on the **Save & Continue** button.

Open Market Bid BD-22-1080-OSD03-OSD03-76004

General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments Q&A **Reminders** Summary

Due Date*	Comment*	Remind Whom*	Days Prior to Remind*	Date Completed	Send Email
(MM/DD/YYYY)	(max 250 characters)			(MM/DD/YYYY)	<input type="checkbox"/>

**Save & Continue** **Reset**

### Step 28: Completing the Reminders Tab

1. If you wish to set up an autogenerated email reminder from COMMBUYS CLM, click on the **calendar icon** next to the **Due Date** field and select the date the reminder should be sent.
2. Enter the text of the reminder in the **Comment** field.
3. Click on the **down arrow** next to the **Remind Whom** field to select the recipient of the reminder email, either you or someone else in your workgroup.
4. If you would like a pre-reminder, indicate the number of days in the **Days Prior to Remind** field.
5. Click on the **Send Email** checkbox.
6. Click on the **Save & Continue** button.

## Step 29: Completing the Amendments Tab

**NOTE:** If you have issued a Notice of Intent and replaced it with an RFR, complete this step. Otherwise go to **Step 30**.

1. Click on the **View Bid Amendment** button.
2. Click on the **General** tab of the amendment, then click on the down arrow in the **Procurement Type** column and select **Request for Response** from the dropdown menu.
3. Enter the **Estimated Award Date** using the MM/DD/YYYY format or by clicking on the calendar icon.
4. Click on the **Save & Continue** button at the bottom of the General tab page.
5. Click on the **Attachments** tab of the amendment and click on the **Add File** button to attach a document previously attached and verified in the CLM BIDPKG, then click on the **Save & Continue** button. **NOTE:** Repeat this step to attach all verified documents previously attached in the CLM BIDPKG.
6. When finished with the attachments, click on the **Summary** tab of the amendment.

Open Market Bid BD-22-1080-OSD07-75929

General Items Address Accounting Routing Attachments(1) Notes Bidders Questions **Amendments(1)** Q & A Reminders Summary

Bid Amendment #	Status	Vendor Bid Amendment Sequence #	Comment	Posted Date
1	In Progress	For Internal Only		

**View Bid Amendment**


Allow Vendors to Submit Multiple/Alternate Quotes: ☒

Info Contact:

Pre-Bid Conference: (Max size: 250 characters)

Bulletin Desc: (Max size: 500 characters)

Quote Notification: ☐

**Estimated Award Date \***: (MM/DD/YYYY)  

**Procurement Type \***: Request for Response

Bid Amendment - Open Market Bid BD-22-1080-OSD07-77612

General **Attachments(2)** Questions Summary [Back to Bid](#)

**Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.**

**Files**

Name	Description	Show Vendor	Confidential	Order	Attached By	Attached Date	Delete
Intent-WTR01_pm_03_02.pdf		<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	Administrator System	03/02/2023	<input type="checkbox"/>
RFR-WTR01_pm_03_02.pdf		<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	Administrator System	03/02/2023	<input type="checkbox"/>

**Required Quote Attachments**

(These are attachments requested by the Agency, and a Quote response must include them to be submitted.)

**Save & Continue** **Add File**

Bid Amendment - Open Market Bid BD-22-1080-OSD07-77612

General Items **Attachments(3)** Questions **Summary** [Back to Bid](#)

**Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.**

**Files**

Name	Description	Show Vendor	Confidential	Order
Prompt Pay Discount form.docx		<input checked="" type="checkbox"/>	<input type="checkbox"/>	0
Intent-WTR01_pm_03_02.pdf		<input checked="" type="checkbox"/>	<input type="checkbox"/>	0
RFR-WTR01_pm_03_02.pdf		<input checked="" type="checkbox"/>	<input type="checkbox"/>	0

**Required Quote Attachments**

(These are attachments requested by the Agency, and a Quote response must include them to be submitted.)

**Save & Continue** **Add File**



## Screenshot

## Directions

Bid Amendment - Open Market Bid BD-22-1080-OSD07-75929

General Items Attachments(2) Questions **Summary** Back to Bid

Comment for the whole bid amendment:

**Header/Item Changes**

Show 25 entries  
Showing 0 to 0 of 0 entries

There are no recorded header/item changes.

**Attachment File Changes**

Modified Field	Item #	File	Description
File #	Header	BIDPWG1667191.pdf	File 'BIDPWG1667191.pdf' added

Comment:

After you click 'Apply Bid Amendment', all the changes will be updated in the real document.

Save & Continue **Apply Bid Amendment** Delete Bid Amendment

- Click on the **Apply Bid Amendment** button.

**Send Bid Actions**

Option(s) ☒ Change bid status to "Sent" and notify vendors ☐ Change bid status to "Sent" only.

**Send Bid**

Cancel Bid Clone Bid Print

### Step 30: Completing the Summary Tab

- Click on the **Summary** tab then click on the **Submit for Approval** button at the bottom of the page. Once approved, the status changes from **In Progress** to **Ready to Send**.
- Following approval, return to the **Summary** tab page, scroll to the bottom of the page and click on the **Send Bid** button.
- When the screen re-displays with a list of vendors, click on the **OK** button at the bottom. This changes the status to **Sent**.

**NOTE:** The RFR has now been sent to the vendors.

00023166	The Boat Guy, Inc.	andy.bancroft (test@perscopeholdings.com)
00042024	Security Boston International, LLC	Daniel Magoon (test@perscopeholdings.com)
00014359	Eastern Harbor Service Inc	Tim Wilson (test@perscopeholdings.com)
00014863	Elite Textile Trading LLC	Cindy hua (test@perscopeholdings.com)
00030581	Hotz Consulting Group LLC	John Hotz (test@perscopeholdings.com)
00033693	Portable Computer Systems, Inc. dba Route1	Brian Ferring (test@perscopeholdings.com)
00012129	Apollo Fishing LLC	Stephanie Rafael DeMello (test@perscopeholdings.com)
00023463	M&G Harbor Services LLC	Michael McDonough (test@perscopeholdings.com)
00099303	Vigor Kivichak LLC	Ross Hendrick (test@perscopeholdings.com)
00048192	LeMole Naval Architecture	Michael LeMole (test@perscopeholdings.com)
00029994	Datrev Inc	PATRICK MANSFIELD (test@perscopeholdings.com)
00039150	All American Marine, Inc.	Ron Wille (test@perscopeholdings.com)
00020053	cape cod marine services inc.	Chris Costa (test@perscopeholdings.com)
00002651	Smith Marine, Inc.	Matthew Placche (test@perscopeholdings.com)
300222	Brunswick Commercial and Government Products Inc.	Rich Ritzen (test@perscopeholdings.com)
00030926	CHISLETT'S BOATING AND DESIGN LLC	Cameron Chislett (test@perscopeholdings.com)

OK