

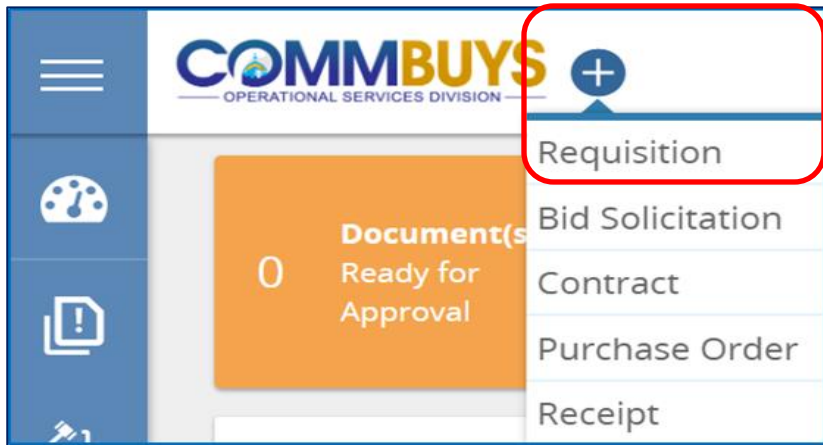

## Job Aid: How to Make a Statewide Contract Purchase in COMMBUYS

This Job Aid shows how to:

- Create a Release Requisition in COMMBUYS
- Submit the Requisition for approval in COMMBUYS
- Send the Vendor a Release Purchase Order

### 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). This job aid will show how to submit a request for goods and services from a Statewide Contract (SWC) or a Departmental Contract. Once the Requisition is approved, a PO is generated and can be sent to the Vendor. This job aid is for users with Basic Purchaser or Department Access privileges in COMMBUYS.

Screenshot	Directions
 A screenshot of the COMMBUYS web application interface. The top left corner shows a blue navigation sidebar with icons for home, dashboard, documents, and help. The main content area features the COMMBUYS logo and the text 'OPERATIONAL SERVICES DIVISION'. A central orange box displays 'Document(s) Ready for Approval' with a '0' count. A dropdown menu is open, showing options: 'Requisition', 'Bid Solicitation', 'Contract', 'Purchase Order', and 'Receipt'. The 'Requisition' option is highlighted with a red rectangular box.	<p><b>Step 1: Selecting a Requisition</b></p> <ol style="list-style-type: none"><li>1. After logging in to COMMBUYS, click on the  <b>Add Documents</b> (plus sign) icon. at the top left of your home page.</li><li>2. Select <b>Requisition</b> from the dropdown menu.</li></ol>

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

Requisition Number:

Status: 1RI - Requisition In Progress (When User request is created)

Department\*: BIDS1 - Procurement Department ▾

Location\*: BIDS1 - Procurement ▾

Required By Date:

Requisition Type: Release ▾

Requestor: Bill O'Malley15

Contact: Bill O'Malley15

Alternate ID:

Estimated Cost: \$0.00

Print Format\*: Requisition Print ▾

Special Instructions:

## Step 2: Completing the General Tab - Left Side

The General tab page displays. On the left side of the page, complete the following fields (asterisk fields are required):

- **Department:** defaults from user profile. May be changed, using the dropdown if other departments are available to the user.
- **Location:** defaults from user profile. May be changed using the dropdown if other locations are available to the user.
- **Requisition Type:** Select Release from the dropdown menu.
- **Contact:** contact person for this requisition; can be changed.
- **Alternate ID:** Enter information as required. Use this field to enter your agency Massachusetts Management Accounting and Reporting System (MMARS) encumbrance ID or your In-House Financial System's PO Number for non-MMARS users. This information will print on the invoice.
- **Special Instructions:** Enter information as required. This field allows for entry of specific delivery instructions to vendors. If entered on the requisition, the data in this field will copy forward to the PO and will also be visible on the print version of the PO (50-character max).

Short Description*:	First Aid Kits			
Fiscal Year:	2021			
Organization:	Department of State Purchasing			
Solicitation Enabled:	<input type="checkbox"/>			
Entered Date:	07/22/2020			
Type Code:	▼			
Purchaser:	O'Malley15, Bill			
Contact Phone:	617	999	9999	-
Tax Rate:	▼			

### Step 3: Completing the General Tab – Right Side

On the right side of the General tab, complete the following fields:

- **Short Description:** be specific as this field can also be used as search criteria to locate a requisition – can be used as a place for your Department document number
- **Fiscal Year:** defaults to the current Fiscal Year
- **Organization:** default value based on your user profile
- **Solicitation Enabled:** select the checkbox if this requisition will convert to a bid (request quotes from contract vendors)
- **Entered Date:** defaults to the current date
- **Purchaser:** defaults to the user's name; use the dropdown to select a different purchaser
- **Contact Phone:** defaults to the user's profile value; can be updated as needed
- **Tax Rate:** N/A for Commonwealth, leave blank.

Click on the **Save & Continue** button at the bottom of the page to save the information entered on the General tab.

**NOTE:** When the screen refreshes, COMMBUYS will automatically generate a Requisition number and the document status on the top right corner will display as **In Progress**.

Release Requisition RQ-21-1990-BIDS1-BIDS1-301191

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

General Vendors Address Accounting Notes

There are no items. Please click 'Search Items' below to add an item.

Search Items

**Step 4: Preparing an Item Search**

1. To add items to the requisition, click on the **Items** tab.
2. Click on the **Search Items** button to begin the process of adding contract goods or services to the requisition.

Search Using:  Find It

Advanced Search

Add to Req & Exit Cancel & Exit

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Search Using:  Find It

Advanced Search

Add to Req & Exit Cancel & Exit

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Advanced Search

Search Using: ALL of the criteria

Search Fields:

Contract/PO #  Description

Item Description  Vendor Name

Catalog

Item Type

UNSPSC Segment-Family

UNSPSC Class

Commodity-EPP  Cooperative Purchasing

Favorites

Result Type: Item  Show Orderable Only

Find It Clear

**Step 5: Searching for Items**

When the Advanced Search page displays, there are two different ways to search. One way is to input the search criteria in the **Search Using** field and click on the **Find It** button.

The second way (the Preferred method) is to click on the **Plus Sign icon (+)** next to **Advanced Search** to open more search fields.

Using the preferred method, you may search by one criterion or multiple criteria.

The most often used fields are:

- **Description:** Enter the Statewide Contract Number
- **Vendor Name:** Enter the Vendor Name
- **Item Description:** Enter the description of the good or service to be purchased.

Click on the **Find It** button to reveal search results displayed at the bottom of the page.

**Release Results**

Release

Search By: << first < prev 1 next > last >>

Any Price  
 Up to \$25 (9)  
 \$25 - \$50 (1)  
 \$50 - \$100 (5)

Any Vendor  
 Cardinal Health Pharmaceutical Division (3)  
 Conversion Vendor (1)  
 Environmental Express (3)  
 Fisher Scientific (1)  
 Johnstone Supply - The Woburn Group (3)

Select	Quantity	Minimum Order Quantity	Item Description	Unit Cost	UOM	Vendor Name
<input type="checkbox"/>	0	0	Safety Products - First Aid Kit: 10 person	\$21.42	EA - Each	Environmental Express
<input type="checkbox"/>	0	0	Safety Products - First Aid Kit: 25 person	\$24.72	EA - Each	Environmental Express
<input type="checkbox"/>	0	0	Safety Products - First Aid Kit: 50 person	\$51.09	EA - Each	Environmental Express

**Step 6: Selecting Items**

The search results display the unit cost, unit of measure (UOM), vendor, etc. for each item.

1. Click on the **checkbox** next to the desired item in the **Select** column
2. Enter a number in the **Quantity** field.
3. Click on the **Add to Req & Exit** button located at the bottom of the page.

Release Requisition RQ-21-1990-BIDS1-BIDS1-301191 Status: RI - In Progress

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

General Vendors Address Accounting Notes

Sort by Column: Print Sequence  Sort Descending

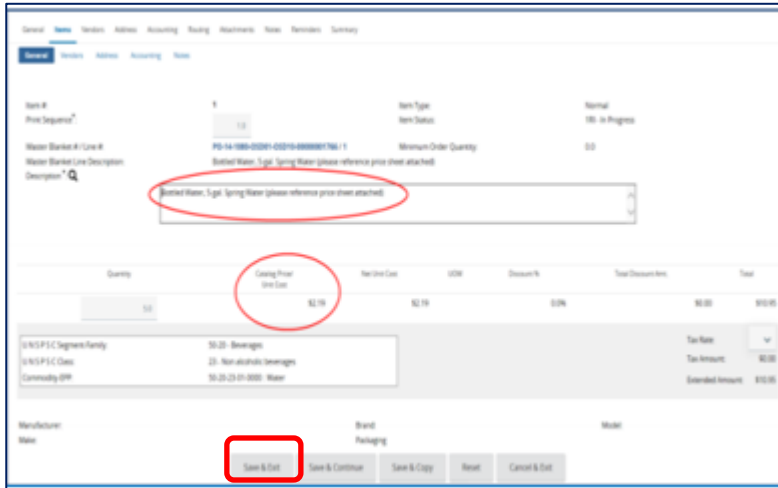
Item #	Links	Print Sequence	Quantity	Minimum Order Quantity	Catalog Price/Unit Cost	Net Unit Cost	UOM	Total Discount Amt	Tax Rate	Tax Amount	Total Cost	Delete All
1	Master Blanket # Line # PO-15-1080-05001-05010-00000004250 / 5302	1.0	30	0.0	\$24.72	\$14.72	EA-Each	\$0.00		\$0.00	\$74.16	<input type="checkbox"/>
Total											\$74.16	

**Step 7: Reviewing Item Information**

The Items tab refreshes with the selected items added to the requisition. A red error box may appear at the top of the page if the pricing is \$0.00.

To add pricing, click on the **Enter Info** hyperlink and go to Step 8, otherwise skip to Step 9.

The Description field can also be modified.



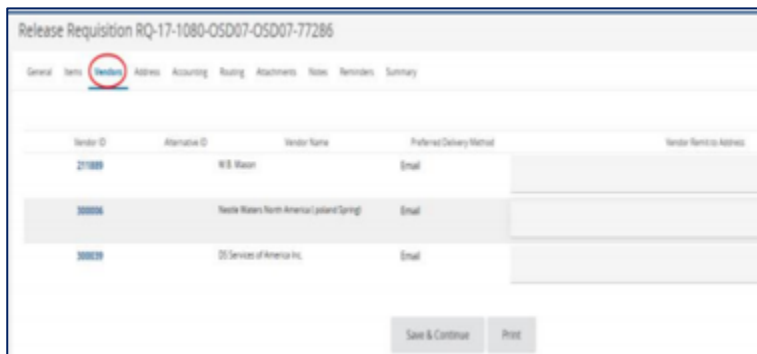
**Step 8: Editing Item Information**

Clicking a hyperlink opens the **Item detail**. This is where you have the option to edit the **Description** field if you choose to explain the item or service in more detail for vendor clarification

**NOTE:** Items/services with a \$0 unit cost need to be edited to enter a dollar value and item description. A price sheet may exist that provides item pricing. Follow instructions in the Contract User Guide.

If quotes are needed, refer to the *“How to Request Quotes from Vendors on Statewide Contracts”* job aid.

Click on the **Save & Exit** button when finished.



**Step 9: Viewing the Vendor Tab**

Click on the **Vendor** tab to view information about the vendor who will receive the PO and deliver the items.

This information is auto populated based on the goods/services selected on the Items tab.

If the vendor name displays **Conversion Vendor or Master Contract Record**, click on the Items tab and select the Vendors sub tab. You will then select the vendor from whom you will purchase the items.

Release Requisition RQ-21-1990-BIDS1-BIDS1-301191

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

Ship-to Address

BIDS1 - Procurement

Andy Dwyer  
80 West Avenue  
Boston, MA 02117  
US  
Email: test@periscopeholdings.com  
Phone: (123)456-7890

Andy Dwyer  
80 West Avenue  
Boston, MA 02117  
US  
Email: test@periscopeholdings.com  
Phone: (123)456-7890

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

### Step 10: Viewing/Editing the Address Tab

Click on the **Address** tab. If no change is required, go to Step 11.

The Address tab is used to display the **Ship-to and Bill-to Address** that is associated with your profile.

1. Update the Address page by clicking on the magnifying glass icon if items are being shipped to, or billed to, a different address from the default.
2. 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.

3. Click on the **Save and Continue** button if you make any changes

**NOTE:** The **Accounting** tab is not currently used in COMMBUYS. The **Routing** tab is not activated until after you submit the document for approval.

Release Requisition RQ-17-1080-OSD07-OSD07-77286

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

AgencyID: VendorID

Files

Click Add File to add file attachments.

No File Attachments

Add File

### Step 11: Viewing/Editing the Attachments Tab

Click on the **Attachments** tab. Attachments may include bid attachments and required forms or contract documents, (e.g. T&Cs, SOWs, MOUs, etc.) If any files automatically attach, review and keep or delete as necessary.

Click on the **Add File** button to add a new file.



Open Market Bid BD-17-1080-RR001-RR001-8368

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

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

Remind Whom

Save & Continue Reset

### Step 12: Adding Notes

Click on the **Notes** tab if you would like to add an internal note that is not viewable by the Vendor.

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

Release Requisition RQ-21-1990-BIDS1-BIDS1-301191

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

Due Date\* (MM/DD/YYYY)

Comment\* (max 250 characters)

Remind Whom\*  v

Days Prior to Remind\*

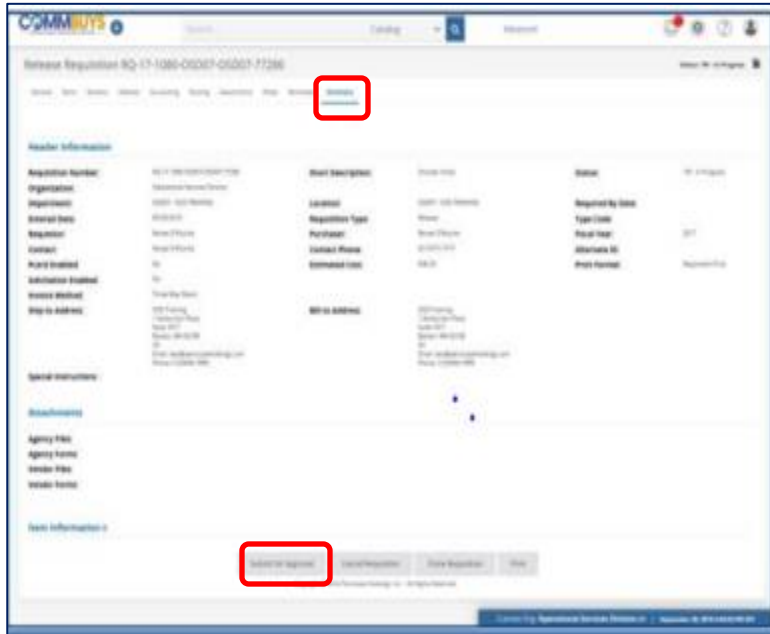
Date Completed (MM/DD/YYYY)

Send Email

Save & Continue Reset

### Step 13: Entering Reminders

1. Click on the **Reminders** tab if you want to send a reminder to yourself or another person within your organization.
2. Use the **calendar icon** in the Due Date field to select the date of the reminder.
3. Enter your reminder text in the **Comment** field.
4. Select yourself or another internal recipient in the dropdown menu next to the **Remind Whom** field.
5. If an advanced reminder is desired, enter a number in the **Days Prior to Remind** field.
6. Click on the **Send Email** checkbox to ensure that the reminder notification is emailed to the intended recipient.
7. When complete, click on the **Save & Continue** button.



#### Step 14: Viewing the Summary Tab

Click on the **Summary** Tab to view a summary of the nearly completed requisition. Review the Summary page information.

Click on the **Submit for Approval** button to submit the requisition for approval.

#### Step 15: Submitting for Approval

Select **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.

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).

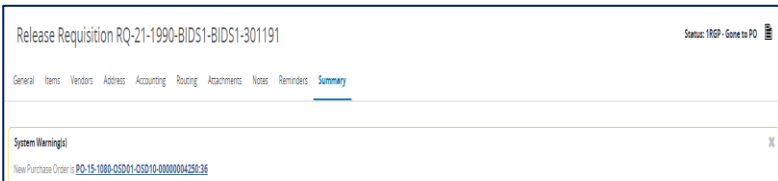
The Purchaser will be informed by COMMBUYS email when the approval is complete, at which point you can log back into COMMBUYS to view or continue with the next step.

Click on the **Save and Continue** button.



**Step 16: Viewing the Summary Tab**

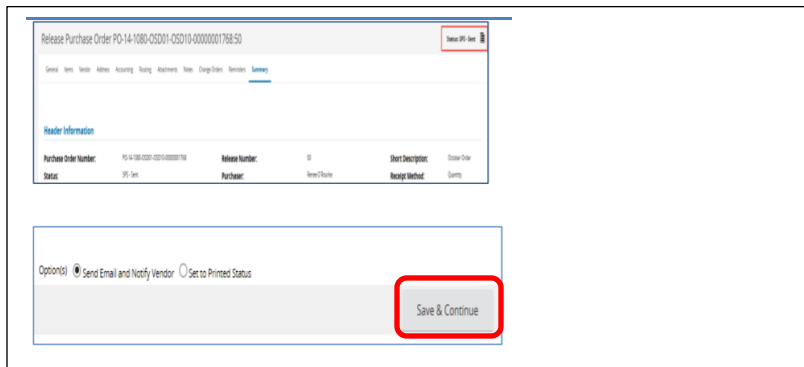
After approval, the Requisition Summary tab redisplay. The status has been updated to **Gone to PO**.



**Step 17: Completing the PO**

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

**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.



If you did not have a direct release purchase order 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.