

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

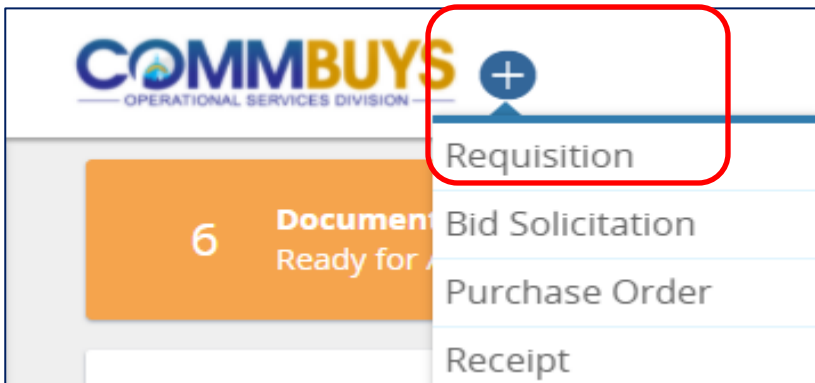
This Job Aid shows how to:

- 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

Step 1: Selecting a Requisition

1. After logging in to COMMBUYS, click on the  **Add Documents** (plus sign) icon. at the top left of your home page.
2. Select **Requisition** from the dropdown menu.

Screenshot

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 :

Directions

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).

Screenshot

Directions

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
- **Solicitation Enabled:** select the checkbox if this requisition will convert to a bid (request quotes from contract vendors)
- **Type Code:** N/A for a requisition.
- **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**.

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 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.

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

Screenshot

Directions

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.

Screenshot

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

Directions

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: 181 - 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-15-1000-05001-05010-00000004250 / 15002	1.0	3.0	0.0	\$24.72	\$24.72	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.

Screenshot

Directions

The screenshot displays the SAP Sales Order Confirmation (VA03) interface. At the top, navigation tabs include General, Sales, Versions, Address, Accounting, Routing, Attachments, Notes, Notifications, and Summary. The 'General' tab is active, showing order details for Sales Order 1000000001.

Order Details:

- Item #: 1
- Price Sequence: 13
- Item Type: Normal
- Item Status: 100 - In Progress
- Material: 1000000001
- Material Description: 1000000001
- Material Unit: 1
- Material Order Quantity: 0.0
- Material Description: 1000000001
- Material Unit: 1
- Material Order Quantity: 0.0

Line Item Table:

Quantity	Gross Price Unit Cost	Net Unit Cost	100%	Discount %	Total Discount Amt.	Total
1.00	\$2.10	\$2.10	100%	0.0%	\$0.00	\$2.10

Summary Table:

Material	Brand	Model	Unit	Quantity	Unit Price	Total Price
1000000001	1000000001	1000000001	1	1.00	\$2.10	\$2.10

Buttons:

- Save & Exit (highlighted with a red circle)
- Save & Continue
- Save & Copy
- Reset
- Cancel & Exit

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.

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

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

Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Vendor Service Address
2710009		W.B. Mason	Email	
3000006		Neale Waters North America (Jaland Springs)	Email	
3000039		DS Services of America Inc.	Email	

Save & Continue Print

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's 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.

Screenshot

Directions

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

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

Ship-to Address

BIDS1 - Procurement Q

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

BIDS1 - Procurement Q

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

Agency(0) Vendor(0)

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.

Screenshot

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

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

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

Remind Whom

Save & Continue Reset

Directions

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) 07/28/2020

Comment* (max 250 characters) Check req status

Remind Whom* O'Brien3, Bill

Days Prior to Remind* 1

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.

Screenshot

Directions

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.

Release Requisition RQ-22-1990-BIDS1-BIDS1-387338 Status: 190 - In Progress

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

Header Information

Requisition Number:	RQ-22-1990-BIDS1-BIDS1-387338	Short Description:	Widget	Status:	190 - In Progress
Organization:	Department of State Purchasing	Location:	BIDS1 - Procurement	Required By Date:	
Department:	BIDS1 - Procurement Department	Requisition Type:	Release	Type Code:	
Entered Date:	01/10/2022	Purchaser:	Bill O'Malley/S	Fiscal Year:	2022
Requester:	Bill O'Malley/S	Contact Phone:	(617)999-9999	Alternate ID:	
Contact:	Bill O'Malley/S	Print Format:	Requisition Print		
Estimated Cost:	\$24,721				
Solicitation Enabled:	No				
Invoice Method:	Three Way Match				
Ship-to Address:	Andy Dwyer 80 West Avenue Boston, MA 02117 US Email: test@periscopesholdings.com Phone: (123)456-7890	Bill-to Address:	Andy Dwyer 80 West Avenue Boston, MA 02117 US Email: test@periscopesholdings.com Phone: (123)456-7890		

Special Instructions :

Attachments

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

Item Information :

Submit for Approval Cancel Requisition Clone Requisition Print

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.

Screenshot

Release Requisition RQ-22-1990-BIDS1-BIDS1-387338

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

System Message(s)

New Purchase Order = PO-15-1080-OSD01-OSD10-00000004250:44

Header Information

Requisition Number: RQ-22-1990-BIDS1-BIDS1-387338 Organization: Department of State Purchasing Department: BIDS1 - Procurement Department Entered Date: 01/10/2022 Requestor: Bill O'Malley15 Contact: Bill O'Malley15 Estimated Cost: \$24,172 Solicitation Enabled: No Invoice Method: Three Way Match Ship-to Address: Andy Owyer 80 West Avenue Boston, MA 02117 US Email: test@percipetoolings.com Phone: (123)456-7890	Short Description: Widget Location: BIDS1 - Procurement Requisition Type: Release Purchaser: Bill O'Malley15 Contact Phone: (617)999-9999 Print Format: Requisition Print	Status: IRQP - Gone to PO Required By Date: Type Code: Fiscal Year: 2022 Alternate ID:
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Special Instructions:

Attachments

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

Item Information

Status: IRQP - Gone to PO

Directions

Step 16: Viewing the Summary Tab

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

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

Release Purchase Order PO-15-1080-OSD01-OSD10-00000004250:44

General Items Vendor Address Accounting Routing Attachments Notes Change Orders Reminders **Summary**

Status: SPS - Sent

Step 17: Completing the PO

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

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

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