

Job Aid: How to Request Quote Revisions

This Job Aid shows how to:

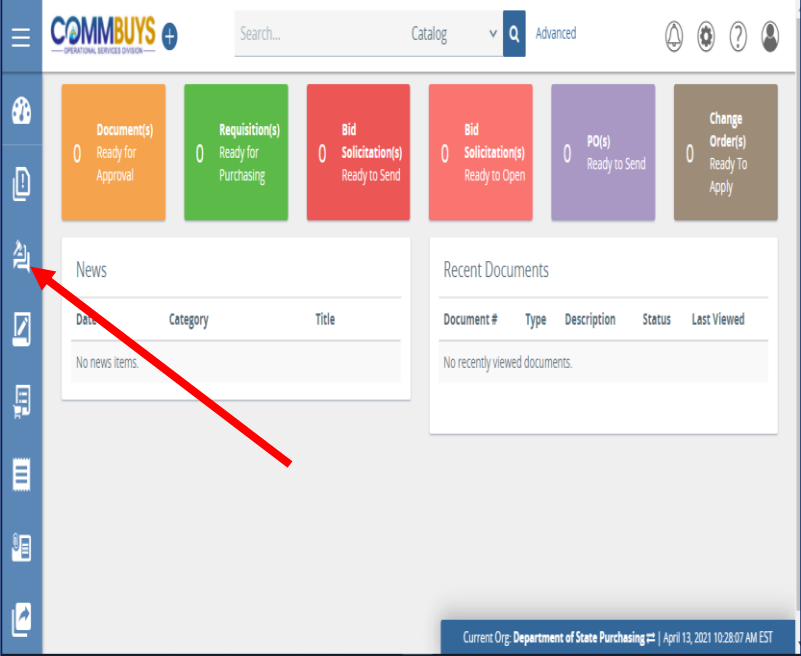
- Request quote revisions from Vendors

Of Special Note:

Revisions are available for both formal & informal bids but cannot be activated until the Bid Opening Date/Time has passed, the bid status is 'Opened', and quotes are being reviewed and evaluated. Remember that vendors can no longer submit new quotes or edit the quotes that they have already submitted in response to the bid after the opening date has passed. However, once a bid has been opened, you can request clarifications and best and final offers (BAFOs) via the proposal revision feature on the Revisions tab of the Bid Tabulation (Bid Tab) for that bid.

In order to activate the revision process, the bid owner must select which Quote/Vendor from whom you wish to request the revision. The COMMBUYS system will allow the bid owner to customize an email request that will be sent to the vendor, notifying them of this request, and specify what additional or clarifying information will be requested on the revised quote. The bid owner will also assign a due date as to when the revision must be completed by the vendor, then close the revision request and recommence quote evaluation.

NOTE: When requesting bid revisions, departments still must follow OSD guidance for clarifications/BAFOs, etc. Refer to the OSD [Best Value Procurement Handbook](#).

Screenshot	Directions
	<p>Step 1: Clicking on the Bid Solicitations Icon</p> <p>After logging in, the main menu displays. Click on the Bid Solicitations icon on the left side of the screen.</p> <p>NOTE: The bid you wish to revise must have you listed as the purchaser, or you need the appropriate COMMBUYS privilege to revise.</p>

Screenshot

Directions

Bid Solicitation #	Description	Bid Type Code	Buyer	Dep / Loc	Bid Opening Date
BD-17-1080-1080C-1080L-8311	test	NS - Non-Statewide Solicitation	Paul Martin	1080CONV D/1080L	09/01/2016 00:00:00
BD-17-1080-1080C-1080L-8312	test	NS - Non-Statewide Solicitation	Paul Martin	1080CONV D/1080L	09/01/2016 00:00:00
BD-17-1080-1080C-1080L-8313	test	NS - Non-Statewide Solicitation	Paul Martin	1080CONV D/1080L	09/01/2016 00:00:00
BD-17-1080-1080C-1080L-8314	test	NS - Non-Statewide Solicitation	Paul Martin	1080CONV D/1080L	09/01/2016 00:00:00
BD-17-1080-1080C-1080L-8315	test	NS - Non-Statewide Solicitation	Paul Martin	1080CONV D/1080L	09/01/2016 00:00:00

Step 2: Clicking on the Opened Tab

The Bid Solicitations screen displays. Click on the **Opened** tab.

NOTE: If the bid is not opened, it will still be in Sent status. Find the Sent bid and click on the blue hyperlink to open it. From the Summary page, click on the **Open Bid** button at the bottom of the page to move the bid to an Opened status.

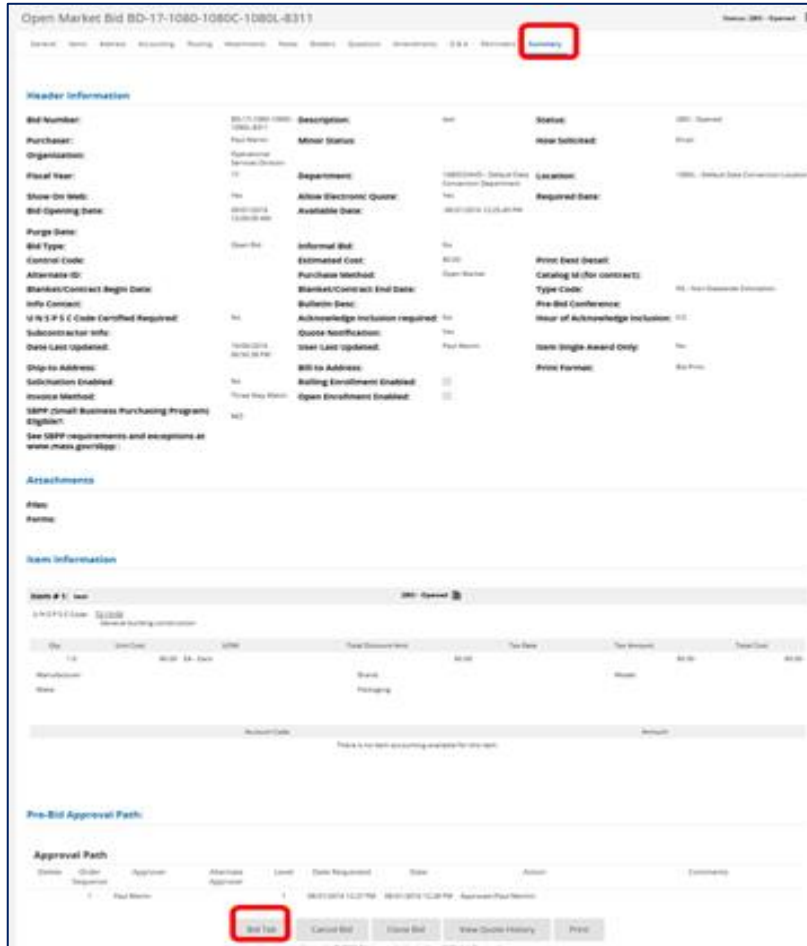
Bid Solicitation #	Description	Bid Type Code	Buyer	Dep / Loc	Bid Opening Date	Bid Tabulation	Quote History	Bid Holder
BD-17-1080-1080C-1080L-8311	test	NS - Non-Statewide Solicitation	Paul Martin	1080CONV D/1080L	09/01/2016 00:00:00	Bid Tab	Quote History	List

Step 3: Selecting a Bid

A list of available open bids displays.

If you wish to locate a bid not assigned to you, click on the blue **View Mine** button on the top right and the display changes to a **“View All”** display.

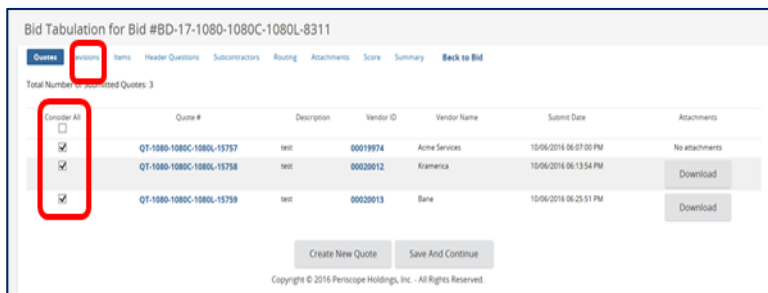
Click on a blue hyperlink in the **Bid Solicitation #** column to display the bid.



Step 4: Clicking the Bid Tab Button

The Bid opens to the **Summary** tab.

Scroll to the bottom of the page and click on the **Bid Tab** button.



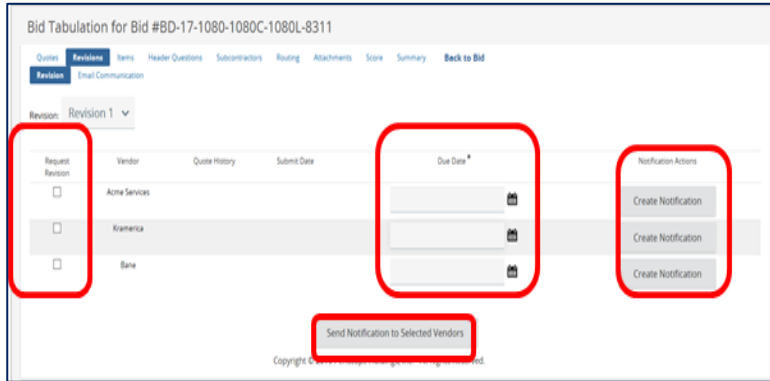
Step 5: Reviewing the Bid Tabulation Page

The **Bid Tabulation** page displays all the Quotes received for the selected bid. Each vendor has a default check in the checkbox in the left column.

To request a revision, decide which vendors you'd like to request a revision from, and to determine if you would like to send multiple vendors the same revision request email, or if you will need to personalize the request email for individual vendors.

To unselect a vendor, select the checkbox next to the desired vendor and the check will disappear.

Click on the **Revisions** tab.



Step 6: Sending the Notification

1. To send the same request to multiple vendors, pick a due date for each revision by clicking on the calendar icon in the Due Date column, then select the check box in the **Request Revision** column for each vendor to receive the request email.

To send a revision request to one vendor, pick the **Due Date** for that vendor's revision, then click on the **Create Notification** button in the **Notification Actions** column next to the vendor you'd like to request a revision from.

2. Click on the **Send Notification to Selected Vendors** button on the bottom of the screen.

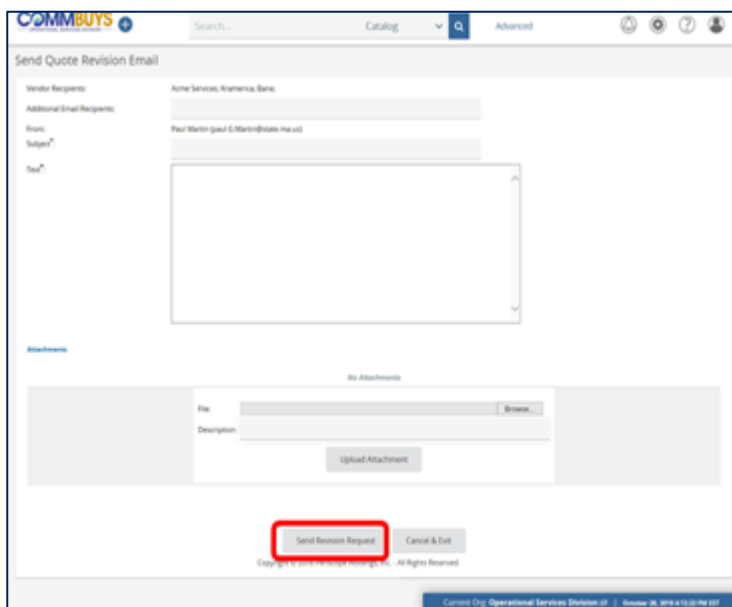
NOTE: While the revision process remains open, you will be prohibited from recommending award, and the vendor can submit and withdraw their quote as needed. They are also able to acknowledge any amendments that were applied to the bid prior to the Bid Opening Date/Time.

Step 7: Sending the Revision Request

1. The **Send Quote Revision Email** screen displays enabling you to develop the email message that will be sent requesting the proposal revision(s), including adding **Additional Email Recipients**, a **Subject**, **Text** (body), and **Attachments**.
2. Once complete, click on the **Send Revision Request** button along the bottom of the screen.

NOTE: The **Text** field does not support standard formatting, so it is recommended that you limit the text in this field and include any instructions in attached documents. Also note that this email will not appear in your email's Sent folder, so if you need a copy for your records, include your own email in the **Additional Email Recipients** field.

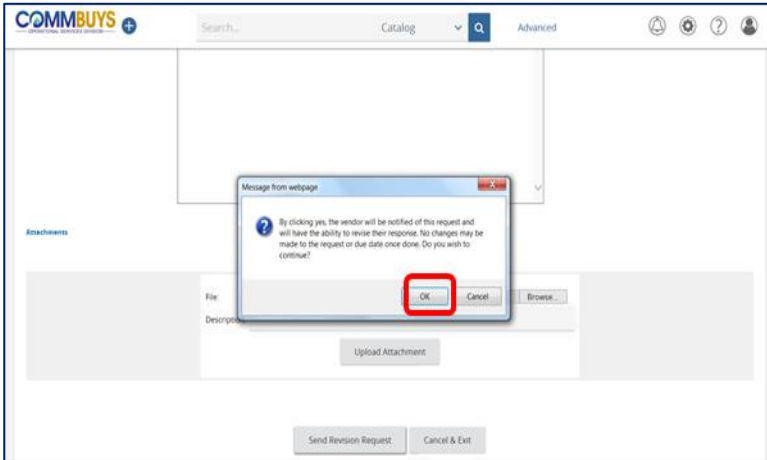
See below for optional instructions that may be helpful for the vendors to locate and respond to revision requests.



Optional instructions that could be part of the email notification sent to the vendor to assist in locating and responding to a revision request:

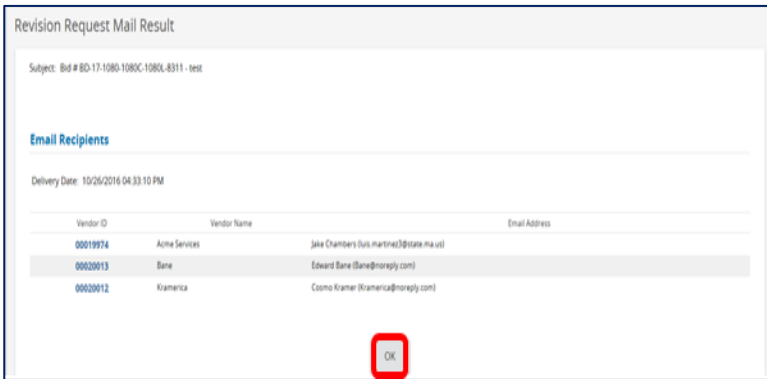
1. Log in to the COMMBUYS system
2. Under the "Home - Welcome Back Your Name" message, select the Quotes tab.
3. Next click on the Revision sub tab. You should see a (1) indicating that the Revision is still open to you, and your response is requested.
4. Click on the Quote # hyperlink, which now lists an '-R1' indicating this is the first revision of your initial quote. Subsequent revision requests will change the number (R2, R3, etc...)
5. You will now be asked to confirm that this revised quote has not yet been submitted. Click on **Yes** to begin editing the quote.
6. The system will display the General tab and you can begin editing the quote as needed. Please note that once all changes are made under a certain tab, you must click on the **Save & Continue** button. Please complete work to all tabs (as needed).
7. Once all edits have been made, move to the Summary tab for review.
8. Once review is completed, click on the **Submit Quote** button at the bottom of the Summary tab. The system will ask that you confirm your intent to submit the quote.
9. You will then receive an email confirmation that the Quote has been submitted.

Once the email is received, click on the **OK** button to send the email to the selected vendor.



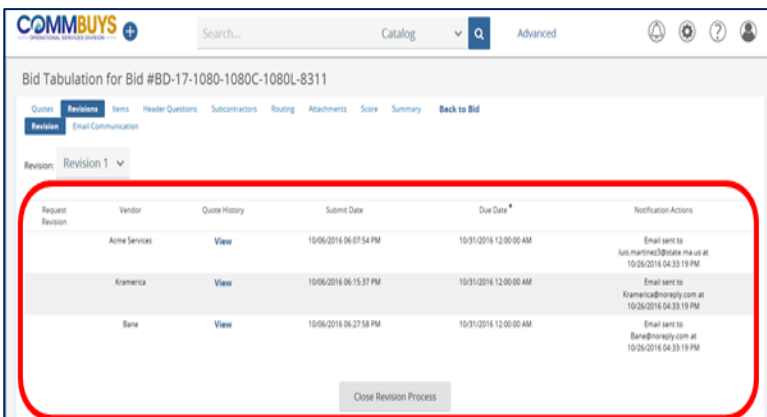
Step 8: Acknowledging the Pop-up Message

A pop-up message displays, confirming your intent to make vendors' Quotes editable and to send the email. If you agree, click on the **OK** button.



Step 9: Acknowledging the Email Recipients

The Revision Request Mail Result Page displays. Click on the **OK** button.



Step 10: Validating the Sent Request

The Bid Tabulation Revisions page displays showing that the revision request was sent.

NOTE: *IMPORTANT*

Do not select Close Revision Process until:

- The selected due date has passed
- You have confirmation that the revised quotes have been submitted
- A decision to end the revision opportunity has been made

See below for more information.

Screenshot

Directions

Home - Welcome Back Cosmo Kramer

News() Vendor Communication() Bids(1429) PO() **Quotes(22)** Invoices() Vendor Performance()

My Profile() My Bids() My Quotes() My Revisions() My Withdrawals()

Quote #	Organization	Bid #	Bid Opening Date	Date Last Modified
QT-1080-1080C-1080L-1578-01	Operational Services Division	BD-17-1080-1080C-1080L-8311	09/01/2016 12:00:00 AM	10/06/2016 06:15:37 PM

NOTE: This is what the Vendor sees.

Vendors will access the request for revision by clicking the Quotes tab, the Revisions sub-tab, and then clicking on the blue hyperlink in the **Quote #** column

After acknowledging the quote, all fields will be open for editing, allowing the vendor to change all aspects of their Quote, including their item price quotes, question/answers, Terms & Conditions response and exceptions, and attachments. After completing the editing process, the vendor can submit their revision by clicking on the **Submit Quote button** on the Summary tab. Revisions can be submitted and withdrawn as desired by the vendor until you choose to close this revision round.

Step 11: Accessing the Bid Tabulation Page

Once you are ready to review the revised Quotes, return to the bid Summary tab, scroll to the bottom of the page and click on the **Bid Tab** button.

Open Market Bid BD-17-1080-1080C-1080L-8311

Summary

Reader Information

Bid Number:	BD-17-1080-1080C-1080L-8311	Description:	WIP	Status:	Open
Purchaser:	Full Name	Minor Status:		How Submitted:	Open
Organization:	Organization				
Fiscal Year:	17	Department:	10801080C - Default Code	Location:	1080 - Default Data Conversion Location
Show On Web:	Yes	Allow Electronic Quote:	Yes	Required Date:	
Bid Opening Date:	09/01/2016 12:00:00 AM	Available Date:	09/01/2016 12:00:00 AM		
Purge Date:		Informal Bid:	Yes		
Bid Type:	Open Bid	Estimated Cost:	\$1.00	Price Best Detail:	
Control Code:		Purchase Method:	Open Market	Carrying of Bid Contract:	
Alternate ID:		Blanket/Contract Begin Date:		Type Code:	00 - Non-Framework Contract
Blanket/Contract End Date:		Blanket/Contract End Date:		Pre-Bid Conference:	
Info Contact:		Bulletin Desc:		Hour of Acknowledge Inclusion:	0.0
W-9 / P-5 C Code Certified Required:	Yes	Acknowledge Inclusion required:	Yes	Hour of Acknowledge Inclusion:	0.0
Subcontractor info:		Quote notification:	Yes	Hour of Acknowledge Inclusion:	0.0
Date Last updated:	10/06/2016 06:15:37 PM	Star Last updated:	Full Name	Hour of Acknowledge Inclusion:	0.0
Step-to Address:		Bid to Address:		Hour of Acknowledge Inclusion:	0.0
Solicitation Enabled:	Yes	Bidding Enrollment Enabled:		Hour of Acknowledge Inclusion:	0.0
Invoice Method:	Three Day Email	Open Enrollment Enabled:		Hour of Acknowledge Inclusion:	0.0

Attachments

Files:
None

Bid Information

Item #	Item	Unit	Quantity	Unit Price	Total Price	Unit Price	Total Price	Unit Price	Total Price
1.0	WIP	WIP	1.00	1.00	1.00	1.00	1.00	1.00	1.00

Pre-Bid Approval Path

Step	Status	Applicant	Approval	Label	Open Required	Date	Action	Comments
1	Full Name					09/01/2016 12:00:00 AM	Approve/Decline/Withdraw	

Bid Tab Cancel Bid Close Bid View Quote History Print

Bid Tabulation for Bid #BD-17-1080-1080C-1080L-8311

Quotes **Revisions** Items Header Questions Subcontractors Routing Attachments Score Summary Back to Bid

Total Number of Submitted Quotes: 3

Consider All	Quote #	Description	Vendor ID	Vendor Name	Submit Date	Attachments
<input type="checkbox"/>	QT-1080-1080C-1080L-15757	INT	00019974	Acme Services	10/06/2016 06:07:00 PM	No attachments
<input checked="" type="checkbox"/>	QT-1080-1080C-1080L-15758	text	00020012	Kramenka	10/06/2016 06:13:54 PM	Download
<input checked="" type="checkbox"/>	QT-1080-1080C-1080L-15759	text	00020013	Bane	10/06/2016 06:25:51 PM	Download

Create New Quote Save And Continue

Step 12: Accessing the Revisions Tab

The **Bid Tabulation** page displays. Click on the **Revisions** tab.

Bid Tabulation for Bid #BD-17-1080-1080C-1080L-8311

Quotes **Revisions** Items Header Questions Subcontractors Routing Attachments Score Summary Back to Bid

Revisions Email Communication

Revision: Revision 2

Request Revision	Vendor	Quote History	Submit Date	Due Date *	Notification Actions
	Acme Services	View	10/06/2016 06:07:54 PM	11/28/2016 12:00:00 AM	Email sent to luis.martinez@boston.ma.us at 10/27/2016 01:07:05 PM
	Kramenka	View	10/06/2016 06:15:37 PM	11/28/2016 12:00:00 AM	Email sent to Kramenka@norply.com at 10/27/2016 01:07:05 PM
	Bane	View	10/06/2016 06:27:58 PM	11/28/2016 12:00:00 AM	Email sent to Bane@norply.com at 10/27/2016 01:07:05 PM

Close Revision Process

Step 13: Closing the Revisions Process

The Revisions page displays. Click on the **Close Revision Process** button on the bottom of the screen.

If a revision was submitted by a vendor, the revised Quote will replace their original on the Bid Tab.

Bid Tabulation for Bid #BD-17-1080-1080C-1080L-8311

Quotes **Revisions** Items Header Questions Subcontractors Routing Attachments Score Summary Back to Bid

Revisions Email Communication

Revision: Revision 3

Request Revision	Vendor	Quote History	Submit Date	Due Date *	Notification Actions
	Kramenka	View	10/06/2016 06:15:37 PM	10/27/2016 01:29:00 PM	Email sent to Kramenka@norply.com at 10/27/2016 01:31:16 PM

Step 14: View Quotes

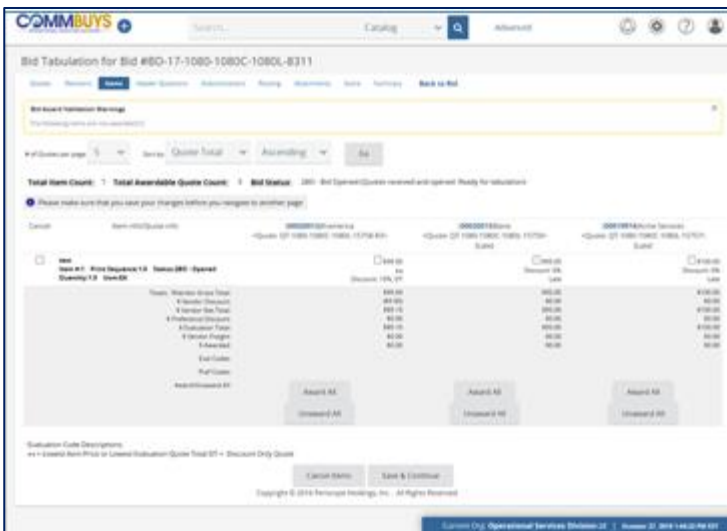
Click on the blue **View** hyperlink in the Quote History column to see the original and revised quote.



Step 15: Viewing the Revised Quotes

The revised quote has a new number with an R1, R2, R3 (revision 1, 2, 3) etc., and it has replaced the original quote. In this example, a third revision is being considered (R3).

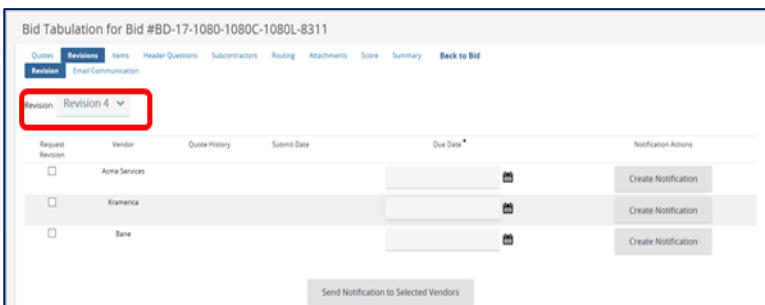
However, if you needed to access information on the original quote you can click on the first **Quote #**.



Step 16: Evaluation & Award

You are now able to continue with the evaluation and award.

Use the job aid titled: **How to Score and Award a Bid in COMMBUYS** to complete this process.



Step 17: New Revision

If needed, you can conduct another revision round, starting the request process again.

In this example, the revision dropdown now displays **Revision 4**.