

## Job Aid: How to Request Quotes from Vendors on Statewide Contracts

### This Job Aid shows how to:

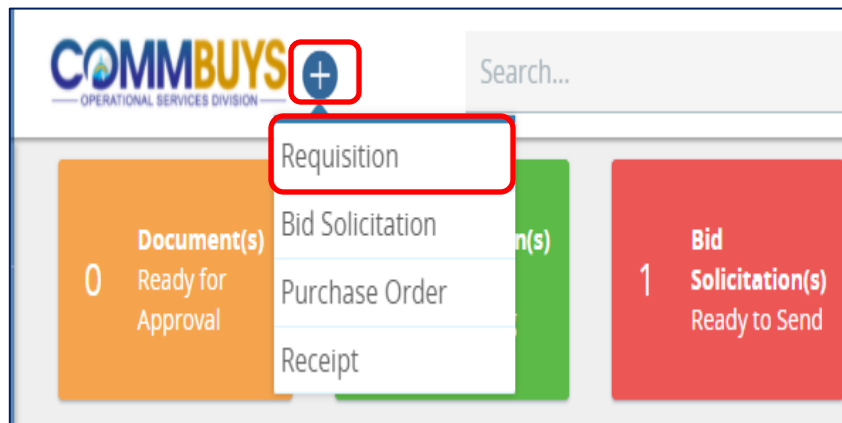
- Create a solicitation enabled bid using a release requisition
- Convert the requisition to a bid
- Request quotes from eligible vendors

### Of Special Note:

A solicitation enabled contract allows a user to solicit quotes from vendors who have Master Blanket Purchase Orders (MBPOs), or Statewide Contracts in COMMBUYS. After creating the requisition, it will be converted to a bid, and after approval, sent to selected vendors


**NOTE:** The MBPO must be designated as “solicitation enabled”. The Contract User Guide will indicate if you must solicit quotes for goods or services. Before beginning the requisition, access the MBPO General tab and verify that the solicitation enabled field displays a “Yes”.

### Screenshot



### Directions

#### Step 1: Creating a New Document

1. Click on the **Add Documents**  icon to begin a new requisition.
2. Select **Requisition** from the dropdown menu.

New Requisition

General Items Address Accounting Routing Attachments Notes Reminders Summary

Requisition Number: Short Description\*: test job aid

Status: IRI - Requisition In Progress (When User request is created) Fiscal Year: 2022

Department\*: BIDS1 - Procurement Department Organization: Department of State Purchasing

Location\*: BIDS1 - Procurement Solicitation Enabled: ☒

Required By Date: Entered Date: 12/28/2021

Requisition Type: Release

Requestor: Bill O'Malley15 Type Code:

Contact: Bill O'Malley15 Purchaser: O'Malley15, Bill

Alternate ID: Contact Phone: 617 999 9999

Estimated Cost: \$0.00 Tax Rate:

Print Format\*: Requisition Print

Special Instructions:

Save & Continue

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## Step 2: Entering Data in the General Tab

The **General** tab for the new requisition opens. Fields with asterisks are required fields. The required fields for **Department**, **Location**, and **Print Format** default to values that may be changed if needed.

1. **Short Description:** Enter the Statewide Contract Number and a brief description of what is being purchased. This field can also be used as search criteria to locate a requisition.
2. **Requisition Type:** Select **Release** from the dropdown menu.
3. **Solicitation Enabled:** Check the box.
4. **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.
5. **Special Instructions:** Enter information as required. This field allows for entry of specific instruction to vendors. If entered on the requisition, the data in this field will copy forward to the PO, and also be visible on the print version of the PO. (50-character max).
6. When you are finished, click on the **Save and Continue** button at the bottom of the page to save the information entered on the General tab.

## Screenshot

Release Requisition RQ-21-1990-BIDS1-BIDS1-301293

General **Items** Vendors Distributors 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

## Directions

### Step 3: Searching for Items

1. To add items to the requisition, click on the **Items** tab.


Click on the **Search Items** button to begin the process of adding contract goods or services to the requisition.

### Step 4: Conducting an Advanced Search

1. Click on the **Plus Sign icon (+)** next to **Advanced Search** to open more search fields.

Release Requisition RQ-21-1990-BIDS1-BIDS1-301293 - Search Items

Search Using:  Find It

**Advanced Search** 

Add to Req & Exit Cancel & Exit

## Screenshot

## Directions

### Step 5: Search Using Criteria

Search Using:  Find It

Advanced Search

Search Using:

Search Fields:

Contract/PO #  Description

Item Description  Vendor Name

Catalog

Item Type

UNSPSC Segment-Family

UNSPSC Class

Commodity-EPP  Q Cooperative Purchasing ☐

Favorites ☐

Result Type:  ☒ Show Orderable Only

1. Search by entering criteria into the **Description, Item Description, and/or UNSPSC Segment-Family** fields:
  - **Description:** Enter the Statewide Contract Number
  - **Item Description:** Enter the description of the good or service to be purchased
  - **UNSPSC:** Enter the Segment-Family and Class
2. Click on the **Find It** button.

### Step 6: Selecting Items

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

**NOTE:** The Vendor Name displays Conversion Vendor or Solicitation Enabled since this is a Solicitation Enabled Contract that includes all awarded vendors for this contract, and the Unit Cost is \$0.00 since this will be converted to a bid.

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.

Select	Quantity	Item Description	Unit Cost	UOM	Vendor Name	Segment-Family Class	Discount %	Master Blanket #	Direct Release Allowed
<input type="checkbox"/>	0	Jenioral Services, District 1 Vendors, Environmentally Preferable, Custodial Services, Contract Services include but no...	\$0.00	E4-Each	Conversion Vendor	76-11 - Cleaning and janitorial services 00 - Cleaning and janitorial services	0.00%	PO-14-1000-OSD01-OSD10-0000000897 / 1	No
<input type="checkbox"/>	0	Jenioral Services, District 2 Vendors, Environmentally Preferable, Custodial Services, Contract Services include but no...	\$0.00	E4-Each	Conversion Vendor	76-11 - Cleaning and janitorial services 00 - Cleaning and janitorial services	0.00%	PO-14-1000-OSD01-OSD10-0000000840 / 1	No
<input type="checkbox"/>	0	Jenioral Services, District 3 Vendors, Environmentally Preferable, Custodial Services, Contract Services include but no...	\$0.00	E4-Each	Conversion Vendor	76-11 - Cleaning and janitorial services 00 - Cleaning and janitorial services	0.00%	PO-14-1000-OSD01-OSD10-0000000843 / 1	No
<input type="checkbox"/>	0	Jenioral Services, District 4 Vendors, Environmentally Preferable, Custodial Services, Contract Services include but no...	\$0.00	E4-Each	Conversion Vendor	76-11 - Cleaning and janitorial services 00 - Cleaning and janitorial services	0.00%	PO-14-1000-OSD01-OSD10-0000000847 / 1	No
<input type="checkbox"/>	0	Jenioral Services, District 5 Vendors, Environmentally Preferable, Custodial Services, Contract Services include but no...	\$0.00	E4-Each	Conversion Vendor	76-11 - Cleaning and janitorial services 00 - Cleaning and janitorial services	0.00%	PO-14-1000-OSD01-OSD10-0000000848 / 1	No
<input type="checkbox"/>	0	Jenioral Services, District 6 Vendors, Environmentally Preferable, Custodial Services, Contract Services include but no...	\$0.00	E4-Each	Conversion Vendor	76-11 - Cleaning and janitorial services 00 - Cleaning and janitorial services	0.00%	PO-14-1000-OSD01-OSD10-0000001370 / 1	No
<input type="checkbox"/>	0	Jenioral Services, Statewide Vendors, Environmentally Preferable, Custodial Services, Contract Services include but no...	\$0.00	E4-Each	Conversion Vendor	76-11 - Cleaning and janitorial services 00 - Cleaning and janitorial services	0.00%	PO-14-1000-OSD01-OSD10-0000001379 / 1	No

## Screenshot

## Directions

### Step 7: Clicking on the Enter Info Hyperlink

The screen displays a warning message regarding a zero-dollar amount.

Click on the blue **Enter Info** hyperlink.

Release Requisition RQ-21-1990-BIDS1-301293

Status: 18 - In Progress

General Items Vendors Distributors Address Accounting Routing Attachments Notes Reminders Summary

General Vendors Address Accounting Notes

General Item Information Validation Errors

Total for master blanket #P0-14-1000-05201-05201-0000001379 must be greater than \$0.00.

Sort by Column: Print Sequence v ☐ Sort Descending Go

Item #	Link	Print Sequence	Quantity	Minimum Order Quantity	Catalog Price Unit Cost	Net Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost	Details
1	Master Blanket # Line # P0-14-1000-05201-05201-0000001379-1	1.0	1.0	0.0		\$0.00	EA - Each	\$0.00		\$0.00	\$0.00	<a href="#">Enter Info</a>
											Total	\$0.00

Please save your changes before sorting. Otherwise, your changes will be lost.

Save & Continue Search Items

### Step 8: Entering More Information

Enter the description for the good or service that you wish to purchase in the Description box. You may delete the displayed text and enter an accurate description with detail for the product or service for which you wish to obtain a quote.

**Note:** You may use the Attachments tab to add further detail from a Word or Excel document.

The following fields should be completed:

- **Description\*:** Enter a description of the product or service up to 1000 characters.
- **Quantity:** Enter the quantity if known or enter 1 if unknown.
- **Unit Cost:** Enter 1.00.
- **UOM:** Select the unit of measure (UOM) - how the item is sold, packaged, or purchased - from the dropdown menu.

When finished, click on the **Save & Exit** button.

Release Requisition RQ-21-1990-BIDS1-301293

Status: 18 - In Progress

General Items Vendors Distributors Address Accounting Routing Attachments Notes Reminders Summary

General Vendors Address Accounting Notes

Item # 1

Print Sequence 1.0

Item Type Normal

Item Status 18 - In Progress

Master Blanket # Line # P0-14-1000-05201-05201-0000001379-1

Minimum Order Quantity 0.0

Master Blanket Line Description: janitorial services, statewide vendors, environmentally preferable, custodial services, contract services include but not limited to: Bathroom Cleaning, Carpet Cleaning, Cleaning Services, Custodial, Dusting, Dusting, Environmentally Preferable, Floor Buffing, Floor Scrubbing, Floor Sealing, Floor Stripping, Floor Waxing, General Cleaning, Green Cleaning, Hard Floor Buffing, janitorial, janitorial services, Mopping, Non Slip Floor, Non Slip Floor, Office Cleaning, Recycling, Restroom Supplies, Restroom Cleaning, Sweeping, Trash Removal, Vacuuming, Washing, Window Washing, A Statement of Work is required to be quoted by at least three (3) vendors. Prevailing wage is required for Commonwealth owned and rented facilities. Please see Contract User Guide for reference.

Description: Q janitorial services, statewide vendors, environmentally preferable, custodial services, contract services include but not limited to: Bathroom Cleaning, Carpet Cleaning, Cleaning Services, Custodial, Dusting, Dusting, Environmentally Preferable, Floor Buffing, Floor Scrubbing, Floor Sealing, Floor Stripping, Floor Waxing, General Cleaning, Green Cleaning, Hard Floor Buffing

Quantity	Catalog Price Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt.	Total
1.0	0.00	\$0.00	EA v	0.0	0.0	\$0.00

Price Reference #:

UNSPSC Segment Family 76-11 - Cleaning and janitorial services

UNSPSC Class 00 - Cleaning and janitorial services

Commodity EPP 76-11-00-00-0000 - Cleaning and janitorial services

Additional product information

Save & Exit Save & Continue Save & Copy Reset Cancel & Exit

## Screenshot

## Directions

### Step 9: Validating the Vendors Tab

1. Click on the **Vendors** tab.

**NOTE:** If the Vendor name displays **Conversion Vendor** or **Solicitation Enabled** skip to Step 10.

If Conversion Vendor or Master Contract Record does not display you will see a red Validation Error identifying that a "vendor is required". If this happens, do the following:

- Click on the **Items** tab.
- Click on the **Vendors** sub tab.
- In the Vendor Name column, click on the blue **Select Vendor** hyperlink.

Release Requisition RQ-21-1990-BIDS1-BIDS1-301293 Status: 100 - In Progress

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

**Vendor Validation Errors**  
Item # 1: vendor is required.

Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Vendor Remits Address
No active address found for this vendor.				

Release Requisition RQ-21-1990-BIDS1-BIDS1-301293

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

**General** **Vendors** Address Accounting Notes

Release Requisition RQ-21-1990-BIDS1-BIDS1-301293

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

General **Vendors** Address Accounting Notes

**Item Vendor Validation Errors**  
Item # 1: vendor is required.

Blanket/Contract #PO-14-1080-OSD01-OSD10-00000001379 Vendor Name:

Item #	Item Description	Vendor Name
1	floor mops for daily use.	<a href="#">Select Vendor</a>

**Release Requisition RQ-21-1990-BIDS1-BIDS1-301293 - Vendor Distributor List**

Master Blanket/Contract #PO-14-1080-OSD01-OSD10-00000001379: FAC81 - Statewide Vendors, Janitorial Services, Environmentally Preferable

Select a vendor from the master blanket/contract vendor distributors list:

Select	Vendor ID	Vendor Name	Alternate ID	Address
<input checked="" type="radio"/>	00000070	UG2, LLC		One International Place 14th Floor
<input type="radio"/>	00000073	Facilities Management & Maintenance, Inc.		25 Beach St 3R
<input type="radio"/>	00000075	Compass Facility Services		65 Jackman Street
<input type="radio"/>	00000076	Complete Cleaning Company, Inc.		548 Chestnut Street
<input type="radio"/>	00000641	Facilltech		92 York Avenue
<input type="radio"/>	00000914	Done Right Building Services, Inc.		4 Copley Place, Suite 125
<input type="radio"/>	211258	S. J. Services Inc.		235 Newbury Street
<input type="radio"/>	223769	National Facility Services, Inc.		730 Main St.
<input type="radio"/>	226830	Mouras Cleaning Service, Inc.		349 Lunenburg St
<input type="radio"/>	300075	CLEANCO Maintenance Corp.		318 Bear Hill Road, Suite 8

[Select](#) [Close Window](#)

- Click on the **radio button** and select one vendor only. It does not matter which single vendor you choose.
  - Click on the **Select** button at the bottom of the screen.
2. Continue on to Step 10 to select your vendors on the Distributors tab.

## Screenshot

## Directions

Release Requisition RQ-21-1990-BIDS1-BIDS1-301293 Status: 100 - In Progress

General Items **Distributors** Billing Accounting Routing Attachments Notes Reminders Summary

Vendor Distributor List

Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Select All
00000770		US2 LLC	Email	<input type="checkbox"/>
00000773		Facilities Management & Maintenance, Inc.	Email	<input type="checkbox"/>
00000775		Compass Facility Services	Email	<input type="checkbox"/>
00000776		Complete Cleaning Company, Inc.	Email	<input type="checkbox"/>
00006441		Faciltech	Email	<input type="checkbox"/>
00009114		Dore-Right Building Services, Inc.	Email	<input type="checkbox"/>
211358		S J Service Inc.	Email	<input type="checkbox"/>
237769		National Facility Services, Inc.	Email	<input type="checkbox"/>
228830		Mourne Cleaning Service, Inc.	Email	<input type="checkbox"/>
300075		CLEANCO Maintenance Corp.	Email	<input type="checkbox"/>

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

### Step 10: Completing the Distributors Tab

Click on the Distributors tab. This screen displays all the vendors on the MBPO who can be selected to notify.

1. Click on the checkbox in the **Select** column to choose vendors from whom you intend to request information and quotes OR click on the checkbox at the top of the Select column to select ALL vendors (this is the best practice). Follow OSD and Department policy when choosing vendors. The Contract User Guide for the Statewide Contract you are buying from will give you guidance.
2. Click on the **Save & Continue** button.

Release Requisition RQ-21-1990-BIDS1-BIDS1-301293

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

Ship-to Address

BIDS1 - Procurement	BIDS1 - Procurement
<p>Andy Dwyer 80 West Avenue Boston, MA 02117 US Email: test@periscopeholdings.com Phone: (123)456-7890</p>	<p>Andy Dwyer 80 West Avenue Boston, MA 02117 US Email: test@periscopeholdings.com Phone: (123)456-7890</p>

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

### Step 11: Validating the Address Tab

1. Click on the **Address** tab. If no change is required go to Step 12. The Address tab is used to display the Ship-to and Bill-to Address that is associated with your profile.
2. Update the Address page by clicking on the magnifying glass icon if items are being shipped to or billed to a different address than the default.
3. 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. Click on the **Save & Continue** button if you make any changes

## Step 12: Adding Attachments

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

1. Click on the **Attachments** tab. If any files auto-attach, review, keep, or delete as necessary. Attachments can include bid attachments and required forms and contract documents
2. Click on the **Add File** button to add a new file.
3. Click on the **Browse** (may be labeled as the **Choose File** button depending on which browser you use).
4. Go to the location on your computer where the attachment resides (desktop, documents file, shared drive, flash drive, etc.), select the file and click on the **Open** button.
5. When the screen displays, the attached file will be listed next to the **Choose File** (or Browse) button. Click on the **Save & Continue** button.
6. Repeat this process if you have additional file attachments.

Release Requisition RQ-21-1990-BIDS1-BIDS1-301293

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

Agency(0) Vendor(0)

**Files**

Click Add File to add file attachments.

No File Attachments

Add File

Add File

Name is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters, spaces, and

Name\*

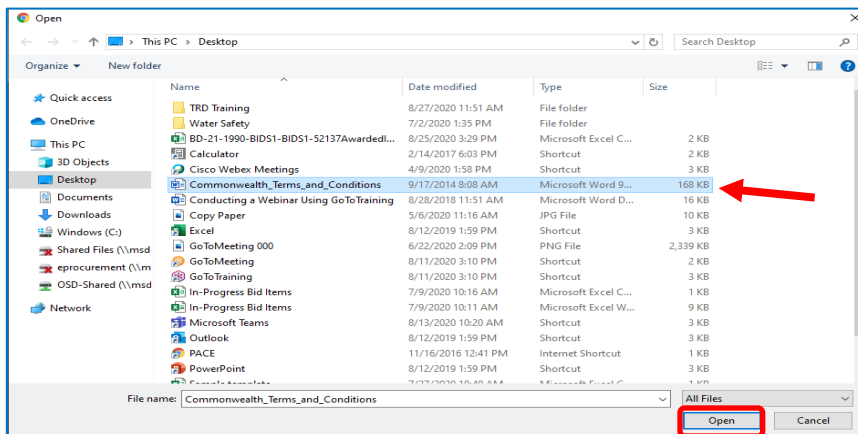
Description:

File\* Choose File No file chosen

Search File

Location: 1990

Save & Exit Save & Continue Reset Cancel & Exit



COMMBUYS+ OPERATIONAL SERVICES DIVISION

Search... Catalog

Add File

Name is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters, spaces, and

Name\* Commonwealth\_Terms\_and\_Conditions.doc

Description:

File\* Choose File Commonwealth...itions.doc

Search File

Location: 1990

Save & Exit Save & Continue Reset Cancel & Exit



## Screenshot

Release Requisition RQ-21-1990-BIDS1-BIDS1-301293

General Items Vendors Distributors Address Accounting Routing Attachments(1) **Notes** Reminders Summary

Delete All Note Date User

☐

Bill O'Malley15

Save & Continue Reset

## Directions

### Step 13: Adding Notes

**NOTE:** The **Notes** and **Reminders** tabs are optional.

If you wish to add a note, click on the **Notes** tab, enter a note in the text box, then click on the **Save & Continue** button.

Notes can be viewed by yourself and anyone else in your work group who has access to your requisitions. Notes cannot be seen by the vendor. Keep in mind however that anything entered in COMMBUYS may be subject to Freedom of Information requests.

Additional notes can be added by repeating this process.

Release Requisition RQ-21-1990-BIDS1-BIDS1-301293

General Items Vendors Distributors Address Accounting Routing Attachments(1) **Reminders** Summary

Due Date\* (MM/DD/YYYY) Comment\* (max 250 characters) Remind Whom\* Days Prior to Remind\* Date Completed (MM/DD/YYYY) Send Email Date Entered Entered By

Save & Continue Reset

### Step 14: Adding Reminders

1. If you wish to add a reminder, click on the **Reminders** tab.
2. Use the calendar icon next to the **Due Date** field to set the date that the reminder should appear.
3. Enter the reminder in the **Comment** text box.
4. Use the dropdown arrow in the **Remind Whom** field to select yourself or someone else in your work group.
5. If you would like a reminder to be sent in advance of the final reminder, choose the number of days prior in the **Days Prior to Remind** field.
6. Select the checkbox under **Send email** so that COMMBUYS sends a reminder to the intended person.
7. Click on the **Save & Continue** button.

Additional reminders can be sent by repeating this process.

## Screenshot

Release Requisition RQ-21-1990-BIDS1-BIDS1-301293 Status: RR - In Progress

General Items Vendors Distributors Address Accounting Routing Attachments(1) Notes Revisions **Summary**

**Header Information**

<b>Requisition Number:</b>	RQ-21-1990-BIDS1-BIDS1-301293	<b>Short Description:</b>	test for solicitation enabled		<b>Status:</b>	RR - In Progress
<b>Organization:</b>	Department of State Purchasing	<b>Location:</b>	BIDS1 - Procurement		<b>Required By Date:</b>	
<b>Department:</b>	BIDS1 - Procurement Department	<b>Requisition Type:</b>	Release		<b>Type Code:</b>	
<b>Entered Date:</b>	08/14/2020	<b>Purchaser:</b>	Bill O'Malley/S		<b>Fiscal Year:</b>	2021
<b>Requestor:</b>	Bill O'Malley/S	<b>Contact Phone:</b>	(617)889-9999		<b>Alternate ID:</b>	
<b>Contact:</b>	Bill O'Malley/S	<b>Estimated Cost:</b>	\$50.00		<b>Print Format:</b>	Requisition Print
<b>Card Enabled:</b>	No					
<b>Solicitation Enabled:</b>	Yes					
<b>Invoice Method:</b>	Three Way Match					
<b>Ship-to Address:</b>	Andy Dwyer 80 West Avenue Boston, MA 02117 US Email: test@periscopeholdings.com Phone: (123)456-7890	<b>Bill-to Address:</b>	Andy Dwyer 80 West Avenue Boston, MA 02117 US Email: test@periscopeholdings.com Phone: (123)456-7890			

**Special Instructions :**

**Attachments**

Agency Files: Commonwealth\_Terms\_and\_Conditions-1.doc

Agency Forms:

Vendor Files:

Vendor Forms:

**Item Information**

**Submit for Approval** Cancel Requisition Clone Requisition Print

## Directions

### Step 15: Submitting for Approval

1. Click on the **Summary** tab to review all the entered data.

When finished, scroll to the bottom of the page and click on the **Submit for Approval** button.

### Step 16: Approval Path

1. The approval path will display, or you're given the option to select the appropriate one. Click on the **Save & Continue** button to complete. Your document status will change from In Progress to Ready for Purchasing.

**NOTE:** The requisition will now proceed through your department's approval path (**no image is provided here as your approval path will vary**). You will be informed by COMMBUYS email when the approval is complete, at which point you can log back into COMMBUYS and continue with Step 17.

## Screenshot

## Directions

### Step 17: Locating the Requisition

Once approved, locate the approved requisition by clicking on the **Requisitions Ready for Purchasing** tile box, or it may be found in the **Recent Documents** section. Either method will display the requisition after clicking on the blue hyperlink.

The screenshot shows the COMMBUYS dashboard with a top navigation bar. A red box highlights the 'Requisitions Ready for Purchasing' tile, which shows '1' requisition. Another red box highlights the 'Recent Documents' table, which lists several requisitions. The first row in the table is highlighted.

Document #	Type	Description	Status	Last Viewed
RQ-21-1990-BIDS1-BIDS1-301293	Requisition	test for solicitation enabled	Ready for Purchasing	09/15/2020
RQ-21-1990-BIDS1-BIDS1-301302	Requisition	hand hat order	Gone to PO	09/15/2020
RQ-21-1990-BIDS1-BIDS1-301301	Requisition	pen and stapler order OFF47_gm_09-15_20	Gone to PO	09/15/2020
RQ-21-1990-BIDS1-BIDS1-301271	Requisition	hand hat order #77667	Gone to PO	09/10/2020
RQ-21-1990-BIDS1-BIDS1-301270	Requisition	pen & stapler order_gm_09-10_20	Gone to PO	09/10/2020

### Step 18: Converting to a Bid

1. The **Summary** tab of the approved Requisition displays. Click on the **Convert to Bid** button at the bottom of the page.

The screenshot shows the 'Release Requisition' page for requisition RQ-21-1990-BIDS1-BIDS1-301293. The 'Summary' tab is selected and highlighted with a red box. At the bottom of the page, the 'Convert to Bid' button is highlighted with a red box. Other buttons like 'Cancel Requisition', 'Clone Requisition', and 'Print' are also visible.

2. A popup message displays. Click on the **OK** button.

www.training.commbuys.com says  
Are you sure you want to convert this requisition to a bid?

OK

Cancel

## Screenshot

## Directions

### Step 19: Opening the New Bid

The Release Requisition page redisplay with a yellow box at the top. Inside this box is a hyperlink to go to the newly created Bid. Click on the **hyperlink**.

The Bid opens to the Summary tab page. This page displays Validation Errors in a red box at the top of the page. These will be resolved in the next Step.

Release Requisition RQ-21-1990-BIDS1-BIDS1-301293 Status: RQ2B - Come to Bid

General Items Vendors Distributors Address Accounting Routing Attachment(s) Notes Reminders **Summary**

**System Warnings(s)**

New Bid(s): [BD-21-1990-BIDS1-BIDS1-52148](#)

**Header Information**

Open Market Bid BD-21-1990-BIDS1-BIDS1-52148 Status: 2B - In Progress

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

**Overall Validation Errors**

The following required fields are missing and opening date available date.  
The following required fields are missing (SBPP Small Business Purchasing Program Eligible).

**Header Information**

<b>Bid Number:</b>	BD-21-1990-BIDS1-BIDS1-52148	<b>Description:</b>	test for solicitation enabled	<b>Status:</b>	2B - In Progress
<b>Purchaser:</b>	BID101/Valley15	<b>Minor Status:</b>		<b>How Solicited:</b>	
<b>Organization:</b>	Department of State Purchasing	<b>Department:</b>	BIDS1 - Procurement Department	<b>Location:</b>	BIDS1 - Procurement
<b>Fiscal Year:</b>	21	<b>Allow Electronic Quote:</b>	Yes	<b>Required Date:</b>	
<b>Show On Web:</b>	Yes	<b>Available Date:</b>			
<b>Bid Opening Date:</b>		<b>Informal Bid:</b>	No	<b>Estimated Cost:</b>	\$0.00
<b>Purge Date:</b>		<b>Purchase Method:</b>	Open Market	<b>Print Desc Detail:</b>	Catalog Id (for contracts)
<b>Bid Type:</b>	Closed Bid	<b>Blanket/Contract Begin Date:</b>		<b>Type Code:</b>	
<b>Control Code:</b>		<b>Blanket/Contract End Date:</b>			
<b>Alternate ID:</b>					

## Step 20: Completing the General Tab

1. Click on the **General** tab.

Complete the following fields:

- **Type Code:** Select **SS** for a statewide contract.
- **Available Date:** This field identifies when the bid becomes available for viewing. Clicking the calendar icon next to this field displays the current date and time. Clicking the **Now** button inserts the current date and time into this field. Click the **Done** button when you have entered the desired date. You can enter a different date and/or time using the calendar and scroll bar.
- **Bid Type:** Ensure that the field displays the default of **Closed Bid**.
- **Purchase Method:** Ensure that **Open Market** is the default.
- **SBPP (Small Business Purchasing Program) Eligible?:** If field is displayed, select **Yes** if up to or equal to \$250K or **No** if over \$250K or if not applicable.
- **Procurement Type:** Select the solicitation type from the dropdown menu.
- **Estimated Award Date:** Enter the anticipated date of award.
- **Bid Opening Date** – This date is the date that will close the bid to the public. On this date, COMMBUYS will no longer accept quotes for that bid and the Buyer will be able to open and view the quotes. This date can be changed in the same manner as the Available Date.

**NOTE:** If needed, change the calendar year before changing the month and day.

2. Click on the **Save & Continue** button at the bottom of the page.

Open Market Bid BD-22-1990-BIDS1-BIDS1-69497 Status: 281 - In Progress

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

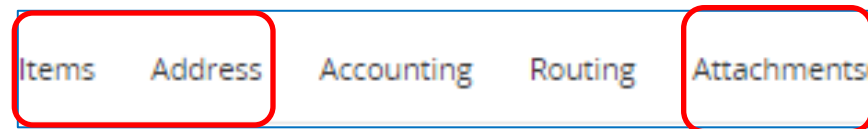
**General Validation Errors**

The following required fields are missing: bid opening date, available date.  
The following required fields are missing: (SBPP (Small Business Purchasing Program) Eligible?, Procurement Type, Estimated Award Date).

Bid Number: BD-22-1990-BIDS1-BIDS1-69497 Description: test job aid  
Status: 281 - In Progress Purchaser: O'Malley15, Bill  
Type Code:  Fiscal Year: 2022  
Department: BIDS1 - Procurement Department Organization: Department of State Purchasing  
Location: BIDS1 - Procurement Allow Electronic Response: ☒  
Show on Web: ☒  
Required Date:  Bid Opening Date: (MM/DD/YYYY HH:MM:SS AM or PM)   
Available Date: (MM/DD/YYYY HH:MM:SS AM or PM)   
Bid Type: Closed Bid Informal Bid: ☐  
Estimated Cost: \$99.00  
Alternate ID:   
Purchase Method: Open Market  
Tax Rate:  Print Format: Bid Print  
Solicitation Enabled: Yes Enable Rolling Enrollment: ☐  
Item Single Award Only: ☐ Enable Open Enrollment: ☐  
Allow Vendors to Submit Multiple/Alternate Quotes: ☒  
Info Contact: Contact Bill O'Malley15 at (617)999-9999  
Pre-Bid Conference: (Max size: 250 characters)   
Bulletin Desc: (Max size: 500 characters)   
Quote Notification: ☐  
SBPP (Small Business Purchasing Program) Eligible?:   
See SBPP requirements and exceptions at [www.mass.gov/sbpp](http://www.mass.gov/sbpp)  
Procurement Type:   
Estimated Award Date: (MM/DD/YYYY)   
Date Last Updated: 12/28/2021 11:45:45 AM User Last Updated: Bill O'Malley15  
**Save & Continue**  
Copyright © 2021 Periscope Holdings, Inc. - All Rights Reserved.  
Current Org: Department of State Purchasing | December 28, 2021 11:49:08 AM EST

## Screenshot

## Directions



### Step 21: Reviewing the Tabs

Information from the requisition has transferred to the bid. Review and verify that all information is accurate on the **Items**, **Address**, and **Attachments** tabs.

**NOTE:** The Notes tab works exactly the same as it did during the requisition process.

### Step 22: Adding Bidders

1. Click on the **Bidders** tab. There is no Vendor tab on a bid. All vendors entered on the requisition are now listed as bidders.
2. Ensure that the radio button next to **Unrestricted Bid** is selected.
3. Click on the **Save & Continue** button at the bottom of the page if any changes were made.

The screenshot shows the 'Open Market Bid' page for bid ID BD-21-1990-BIDS1-BIDS1-52149. The 'Bidders' tab is selected. Below the tabs, there is a section for selecting bidder participation, with the 'Unrestricted bid, all vendors can view and respond' radio button selected. Below this is a table of bidders.

Delete All	Vendor ID	Vendor Name	Bid Mailing Address	Add New Address	Email
<input type="checkbox"/>	0000070	UGL LLC	General Mailing Address - Bob Desaulniers One International Place ...		
<input type="checkbox"/>	0000073	Facilities Management & Maintenance, Inc.	General Mailing Address - Lisa Fitzgerald 25 Beach St 3R Dorchester...		
<input type="checkbox"/>	0000075	Compass Facility Services	General Mailing Address - Vincent Calderone 65 Jackman Street Geor...		
<input type="checkbox"/>	0000076	Complete Cleaning Company, Inc.	General Mailing Address - Garry Beaver 548 Chestnut Street Lynn, ...		

## Screenshot

## Directions

### Step 23: Completing the Questions Tab

1. Click on the **Questions** tab.
2. If desired, ask vendors questions by entering text in the **Question** field.
3. Select the **Required** checkbox if the questions must be answered before the quote can be submitted by the vendor.
4. Select a value from the **Response Type** dropdown list to establish a format for the vendor response.
5. Click on the **Save & Continue** button to save your entries.

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

### Step 24: Completing the Q&A Tab

1. Click on the **Q&A** tab. It is a best practice to complete all the actions in this Step.
2. To allow dialogue with the vendors, select the **Allow vendor to submit questions** checkbox.
3. If you would like COMMBUYS to notify you when a vendor submits a question, select the **Send notification when vendor submitting question** checkbox.
4. If desired, you or the vendor can enter a **Question Subject** and **Question** into the respective fields, and the other party can respond in the **Answer** field.
5. Click on the **Show on Web** checkbox.
6. When complete, click on the **Save & Continue** button.

**NOTE:** The Reminders tab works exactly the same as it did during the requisition process.

## Screenshot

## Directions

Open Market Bid BD-21-1990-BIDS1-BIDS1-52149 Status: 2B - In Progress

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

---

**Header Information**

<b>Bid Number:</b> BD-21-1990-BIDS1-BIDS1-52149	<b>Description:</b> test for solicitation enabled	<b>Status:</b> 2B - In Progress
<b>Purchaser:</b> Bid 01/01/15	<b>Minor Status:</b>	<b>How Solicited:</b> Email
<b>Organization:</b> Department of State Purchasing	<b>Department:</b> BIDS - Procurement Department	<b>Location:</b> BIDS - Procurement
<b>Fiscal Year:</b> 21	<b>Allow Electronic Quote:</b> Yes	<b>Required Date:</b>
<b>Show On Web:</b> Yes	<b>Available Date:</b> 09/16/2020 01:09:49 PM	
<b>Bid Opening Date:</b> 09/30/2020 12:00:00 AM		
<b>Purge Date:</b>		
<b>Bid Type:</b> Closed Bid	<b>Informal Bid:</b> No	
<b>Control Code:</b>	<b>Estimated Cost:</b> \$30.00	<b>Print Dist Detail:</b>
<b>Alternate ID:</b>	<b>Purchase Method:</b> Open Market	<b>Catalog Id (for contract):</b>
<b>Blanket/Contract Begin Date:</b>	<b>Blanket/Contract End Date:</b>	<b>Type Code:</b>
<b>Info Contact:</b> Contact Bid 01/01/15 at 817399-9999	<b>Bulletin Desc:</b>	<b>Pre-Bid Conference:</b>
<b>UNSPSC Code Certified Required:</b> No	<b>Acknowledge inclusion required:</b> No	<b>Hour of Acknowledge inclusion:</b> 00
<b>Subcontractor Info:</b>	<b>Quote Notification:</b> No	
<b>Date Last Updated:</b> 09/16/2020 01:09:59 PM	<b>User Last Updated:</b> Bid 01/01/15	<b>Item Single Award Only:</b> No
<b>Ship-to Address:</b> Atty/Driver 80 West Avenue Boston, MA 02117 US Email: test@openmarketbids.com Phone: (1234567890)	<b>Bill-to Address:</b> Atty/Driver 80 West Avenue Boston, MA 02117 US Email: test@openmarketbids.com Phone: (1234567890)	<b>Print Format:</b>
<b>Solicitation Enabled:</b> Yes	<b>Rolling Enrollment Enabled:</b>	<b>Allow vendors to submit multiple / alternate quotes:</b> <input type="checkbox"/>
<b>Invoice Method:</b> Three Way Match	<b>Open Enrollment Enabled:</b> <input type="checkbox"/>	

### Step 25: Reviewing the Summary Tab

1. Click on the **Summary** tab to review the bid information.
2. Scroll to the bottom of the page and click on the **Submit for Approval** button. At this point the bid will proceed through your approval process.

COMMBUYS Catalog  Advanced

0 Documents(s) Ready for Approval 0 Requisition(s) Ready for Purchasing **2 Bid Solicitation(s) Ready to Send** 2 Bid Solicitation(s) Ready to Open 1 PO(s) Ready to Send 0 Change Order(s) Ready To Apply

**News**

Date	Category	Title
No news items.		

**Recent Documents**

Document #	Type	Description	Status	Last Viewed
BD-21-1990-BIDS1-BIDS1-52149	Bid	test for solicitation enabled	Ready to Send	09/16/2020
RQ-21-1990-BIDS1-BIDS1-301303	Requisition	test for solicitation enabled	Gone to Bid	09/16/2020
RQ-21-1990-BIDS1-BIDS1-301293	Requisition	test for solicitation enabled	Gone to Bid	09/16/2020
BD-21-1990-BIDS1-BIDS1-52139	Bid	Water Safety Program_pm	Bid to PO	09/16/2020
RQ-21-1990-BIDS1-BIDS1-301259	Requisition	TR001 - Electrician Service_pm	Gone to PO	09/16/2020

[View More](#)

### Step 26: Sending the Bid

1. Once the bid is approved, you will receive an email notification from COMMBUYS. Locate the bid by selecting the tile box **Bid Solicitation(s) Ready to Send** or look for it in the **Recent Documents** box.
2. Click on the blue hyperlink for the bid.

UNSPSC Code: 761140  
Cleaning and janitorial services  
76114020  
Cleaning and janitorial services  
761140200000  
Cleaning and janitorial services

Req # Item #: RQ-21-1990-BIDS1-BIDS1-301303 / 1

Disable Pricing On Quote	Qty	Unit Cost	UOM	Total Discount Amt	Tax Rate	Tax Amount	Total Cost
No	30.0	\$1.00	EA-Each		90.00	90.00	\$30.00

Manufacturer: Brand: Model:

Name: Packaging:

Product Length: Product Width: Product Height:

UPC/EAN: SKU:

Tags: URL:

Account Code: Amount: There is no item accounting available for this item.

**Pre-Bid Approval Path:**

There are no approval paths found for this Bid.

**Send Bid Actions**

Options: ☒ Change bid status to 'Sent' and notify vendors ☐ Change bid status to 'Sent' only

**Send Bid**

Cancel Bid Clone Bid Print

3. The Summary tab page displays with a status of Ready to Send. Scroll to the bottom of the page and click on the **Send Bid** button. A list of your selected vendors will display. Click on the **OK** button to send the bid.

**NOTE:** Your bid is now in **Sent** status which indicates that all selected bidders will receive the bid electronically on the available date.