Job Aid:

How to Request Quotes from Vendors on Statewide Contracts

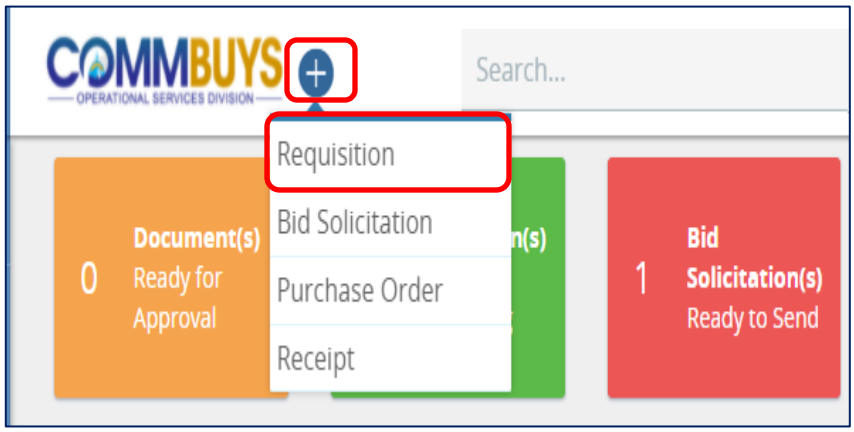
This Job Aid shows how to:

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

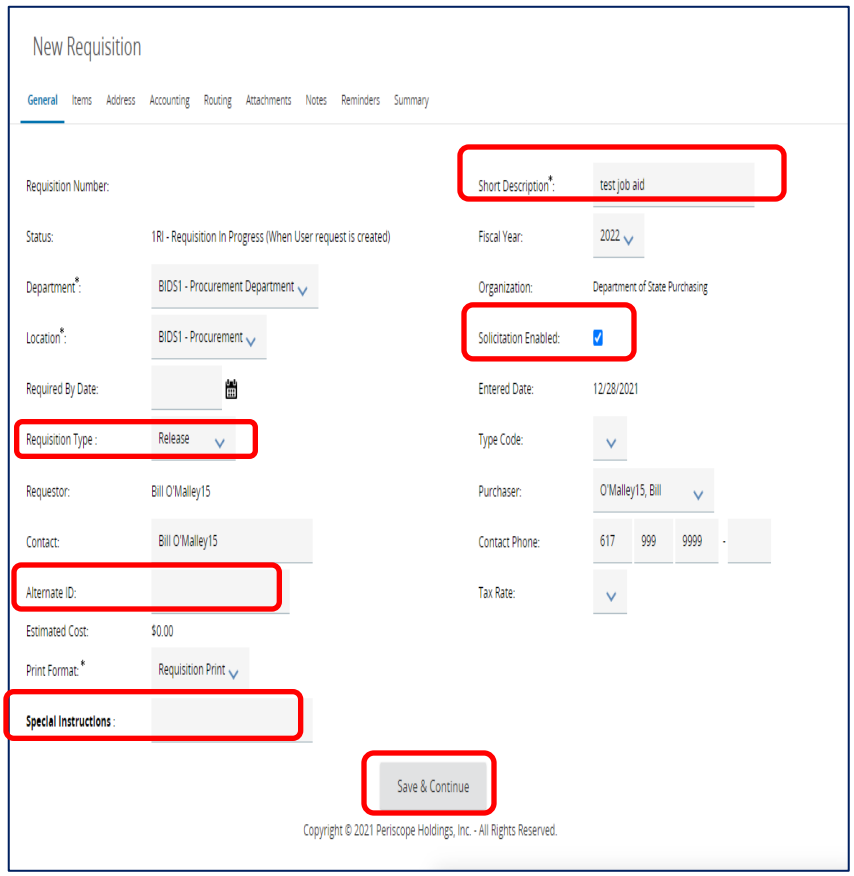
Of Special Note:

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.

Screenshot



Directions

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.

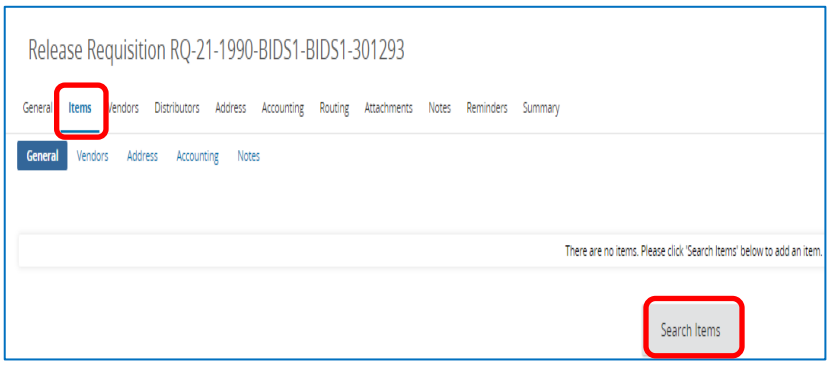
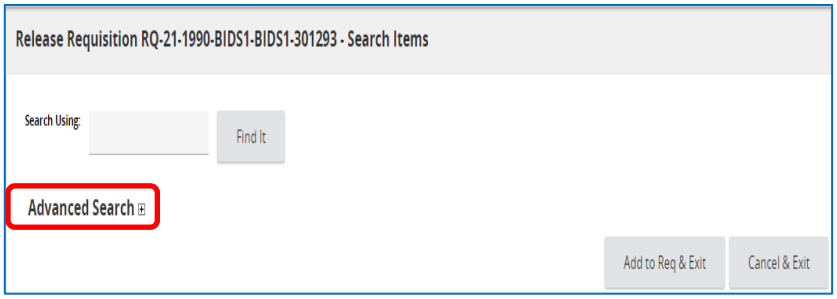
2. **Requisition Type**: Select **Release** from the dropdown menu.

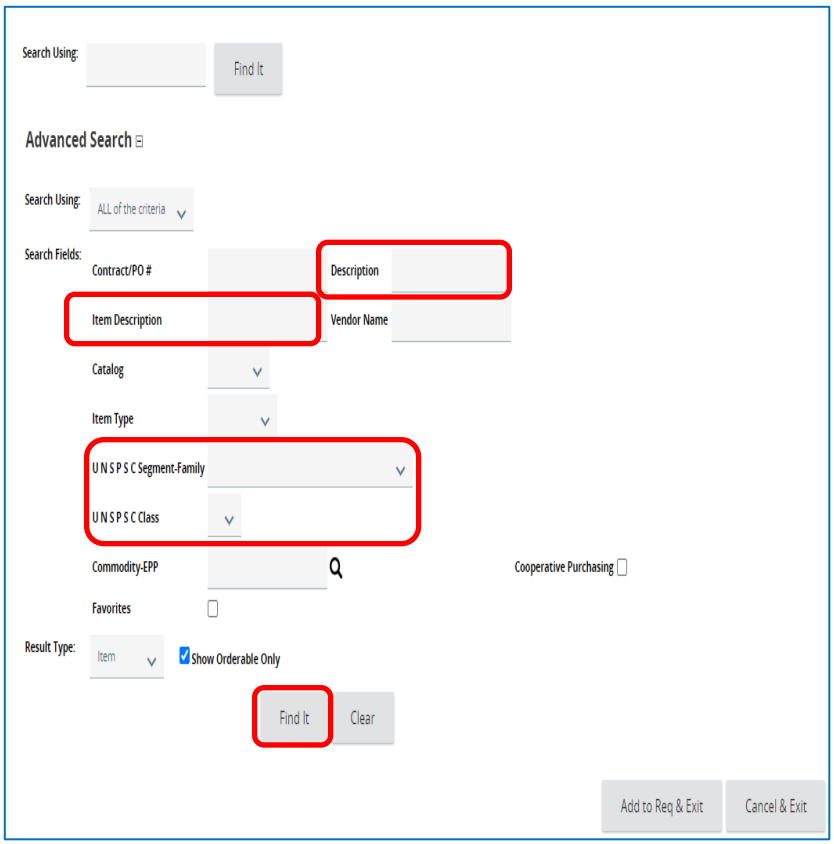
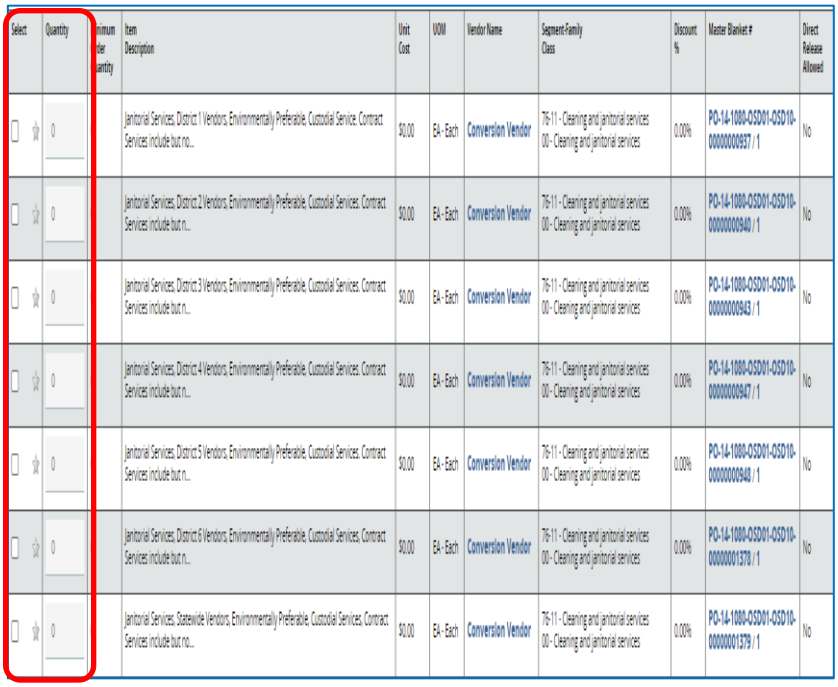
3. **Solicitation Enabled:** Check the box.

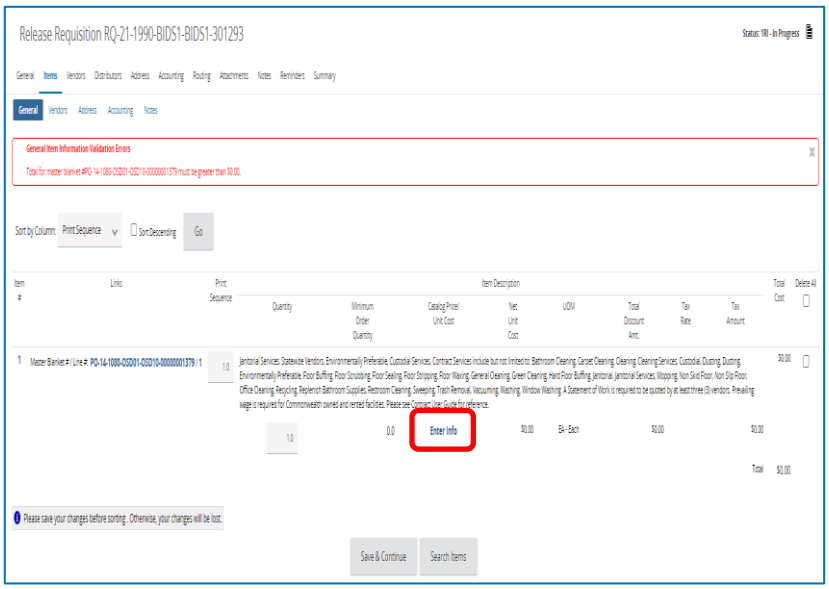
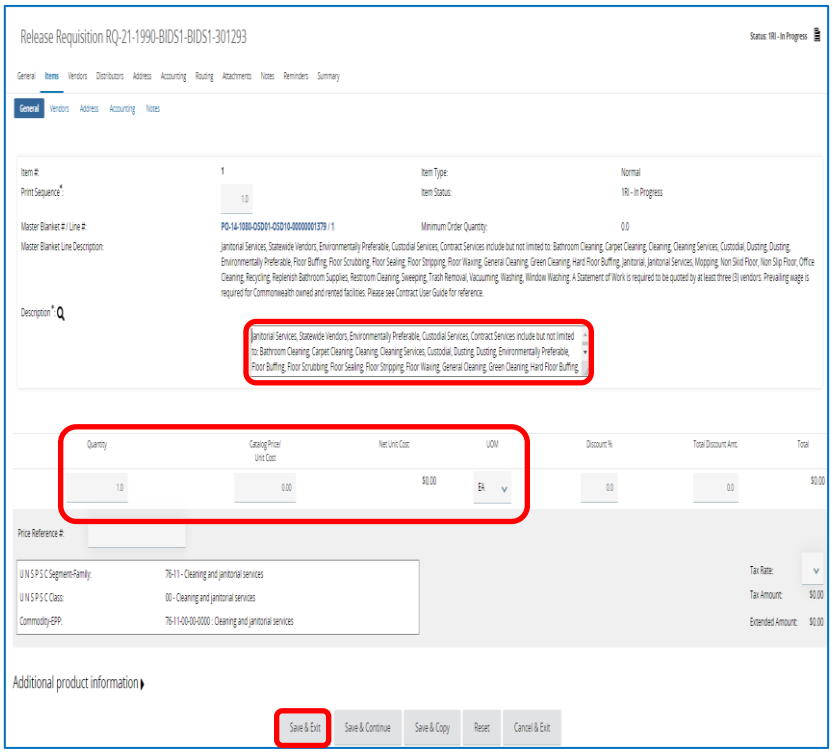
4. **Alternate ID**: Enter information as required. Use this field to enter your agency Massachusetts Management Accounting and Reporting System (MMARS) encumbrance ID or your In-House Financial System's PO Number for non-MMARS users.

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	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.

Screenshot	Directions
	**Step 5: Search Using Criteria** 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.

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.
	**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.

Screenshot	Directions

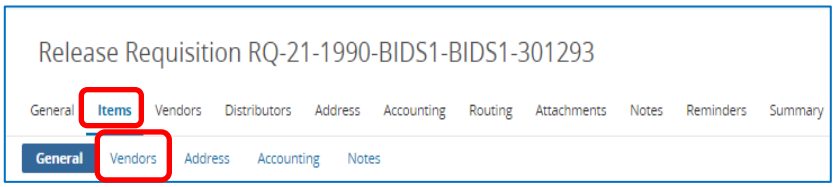
Step 9: Validating the Vendors Tab

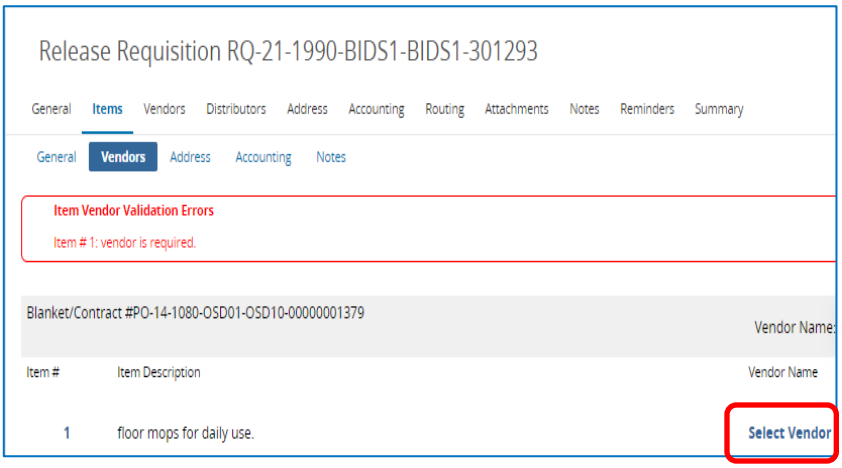
1. Click on the **Vendors** tab.

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

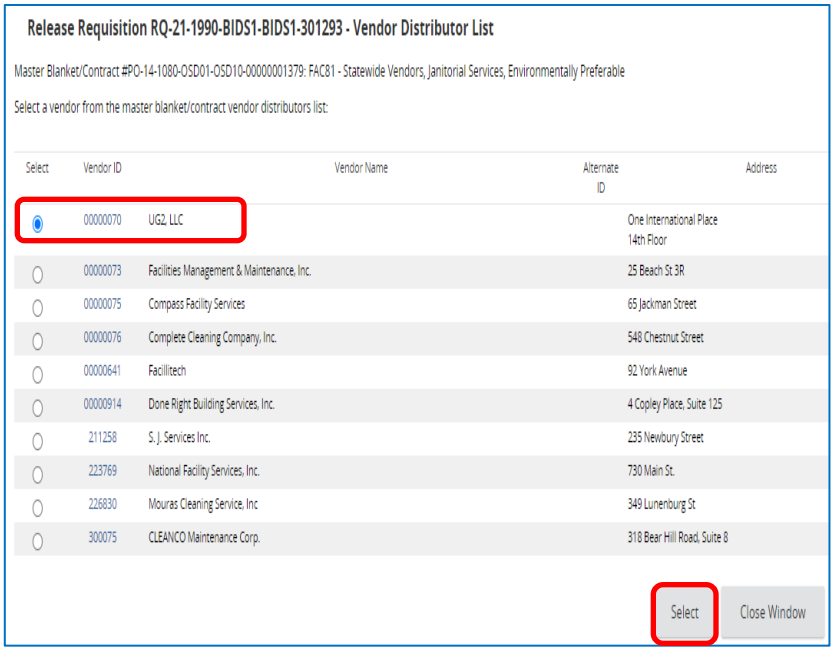
If Conversion Vendor or Master Contract Record does not display you will see a red Validation Error identifying that a "vendor is required". If this happens, do the following:

- Click on the **Items** tab.
- Click on the **Vendors** sub tab.



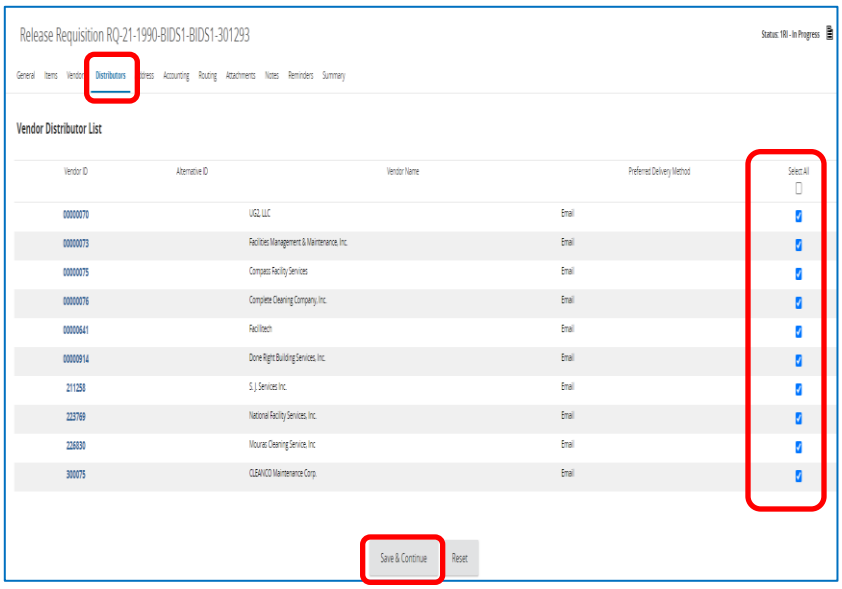
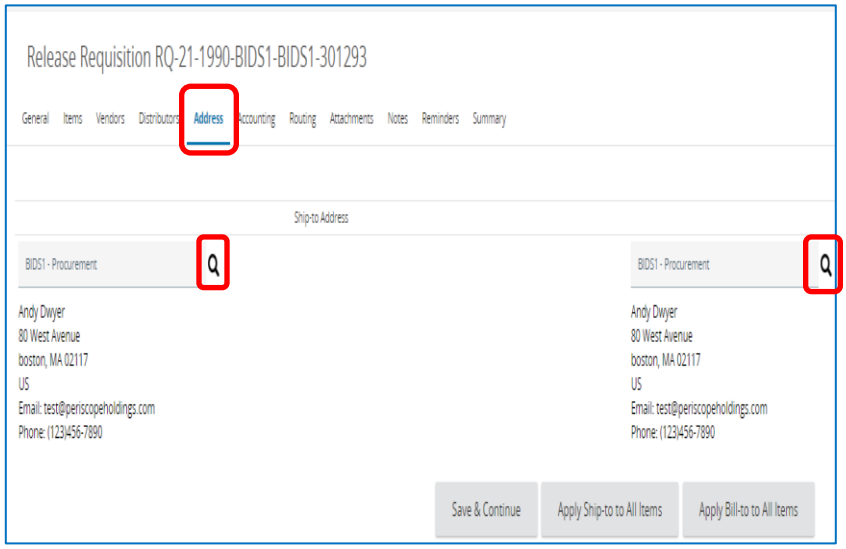


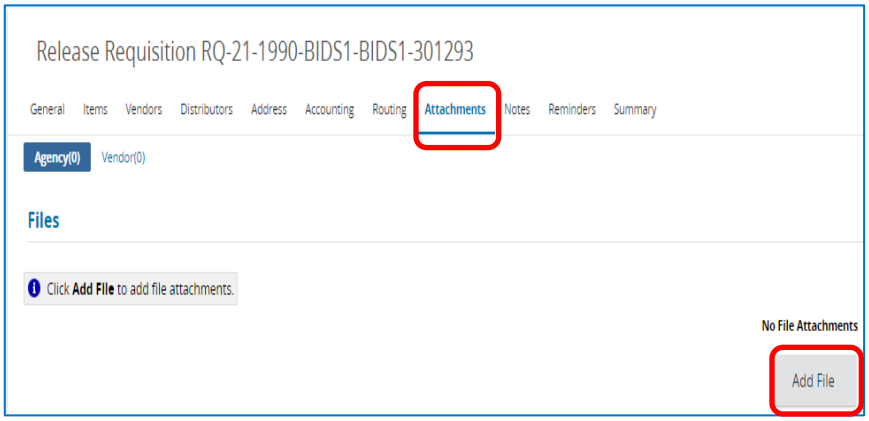
- In the Vendor Name column, click on the blue **Select Vendor** hyperlink.

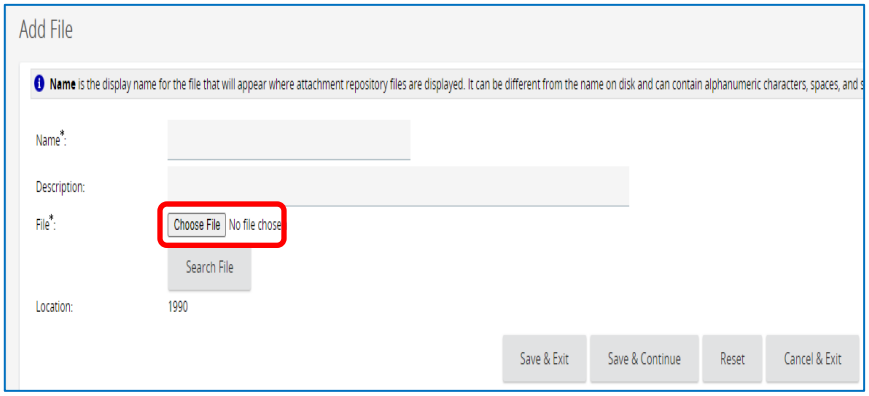


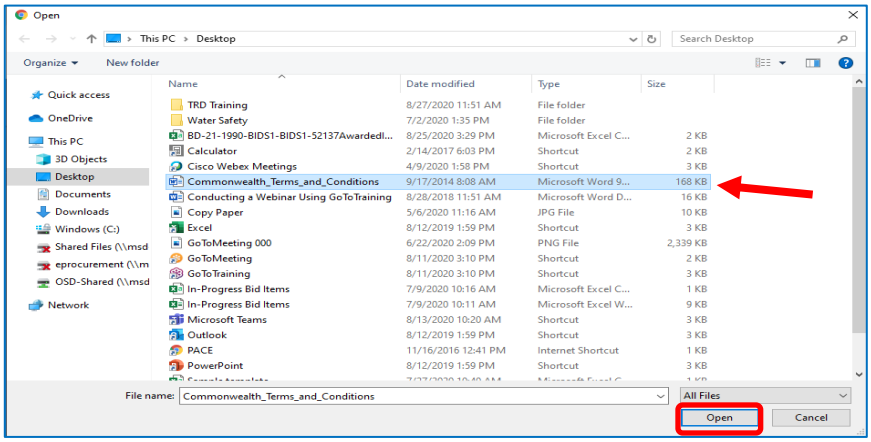
- Click on the **radio button** and select one vendor only. It does not matter which single vendor you choose.
- Click on the **Select** button at the bottom of the screen.

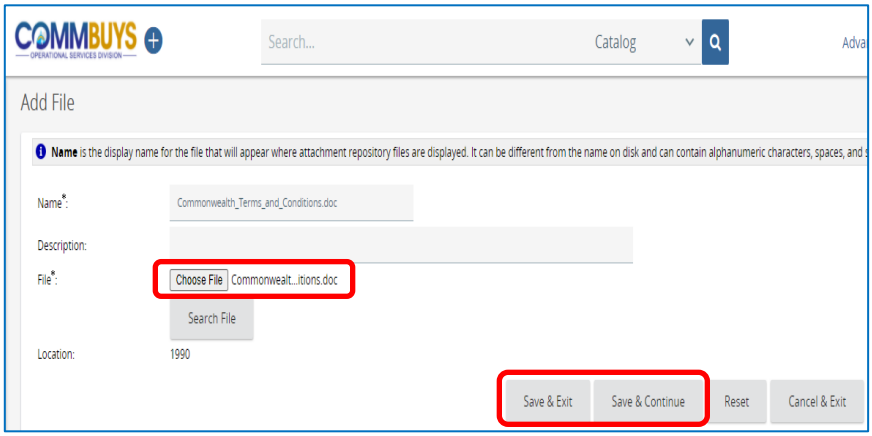
2. Continue on to Step 10 to select your vendors on the Distributors tab.

Screenshot	Directions
	**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.
	**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 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

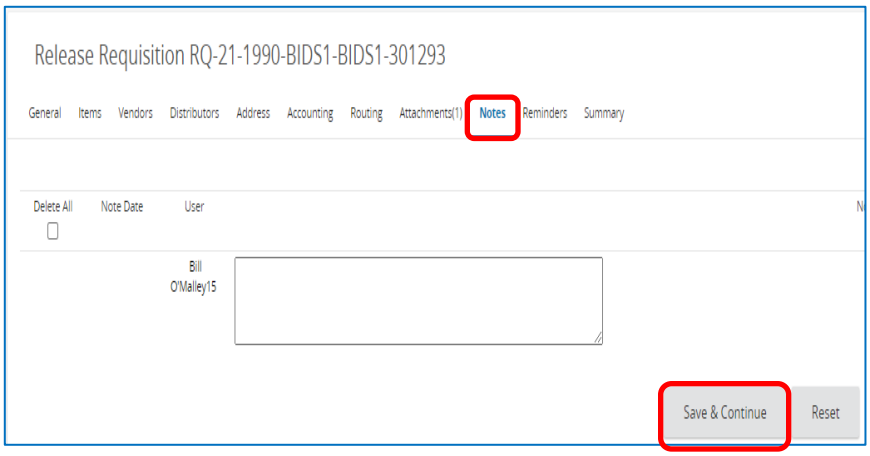
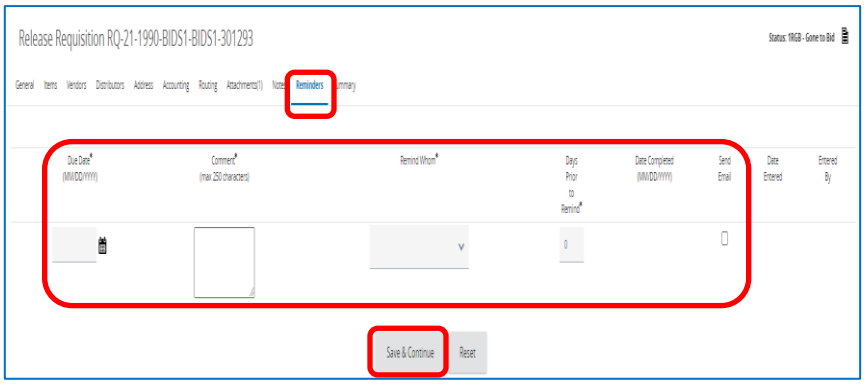
2. Click on the **Add File** button to add a new file.

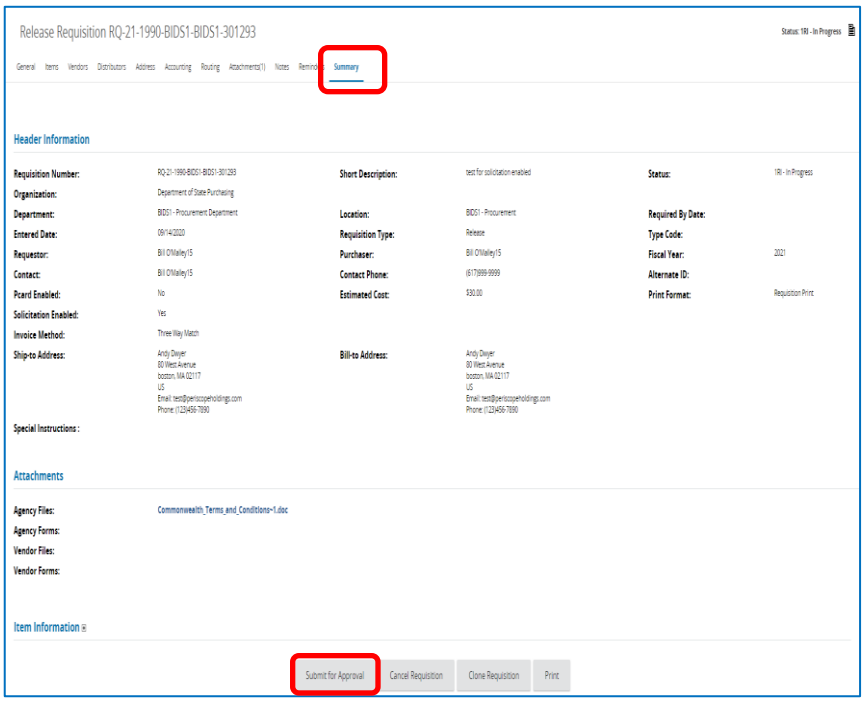
3. Click on the **Browse** (may be labeled as the **Choose File** button depending on which browser you use).

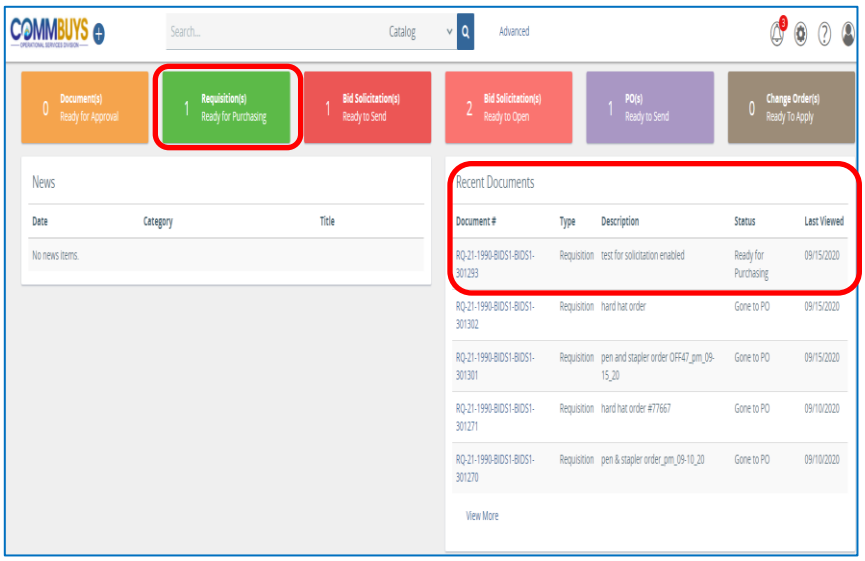
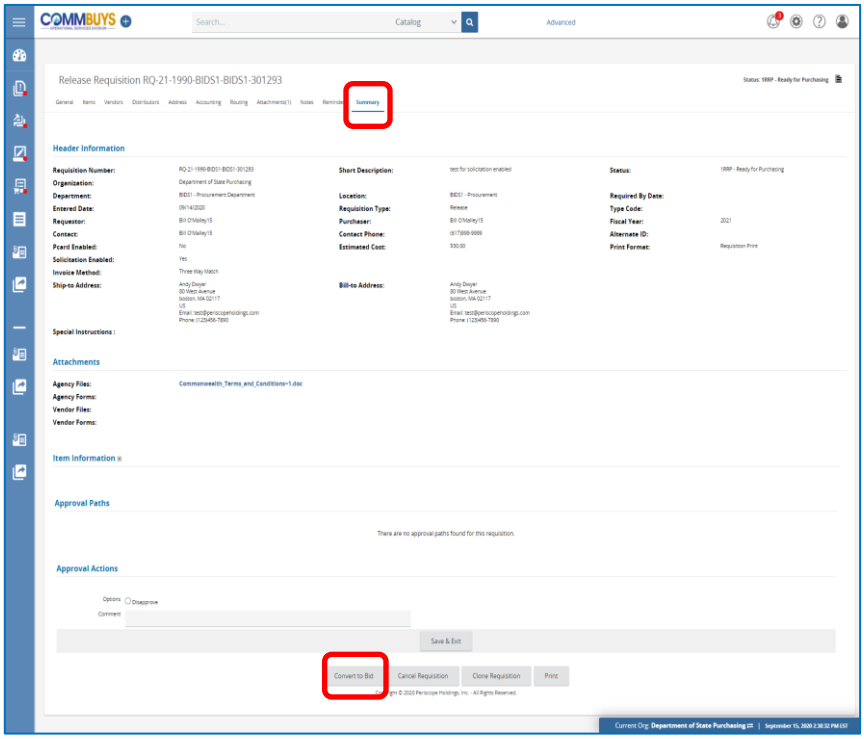
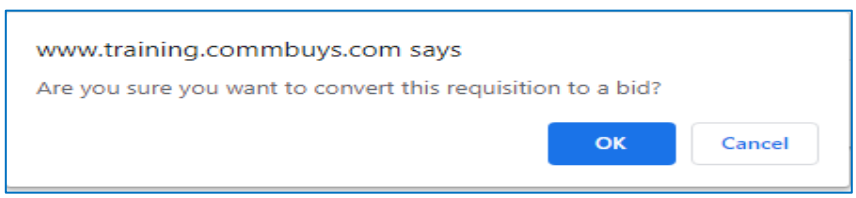
4. Go to the location on your computer where the attachment resides (desktop, documents file, shared drive, flash drive, etc.), select the file and click on the **Open** button.

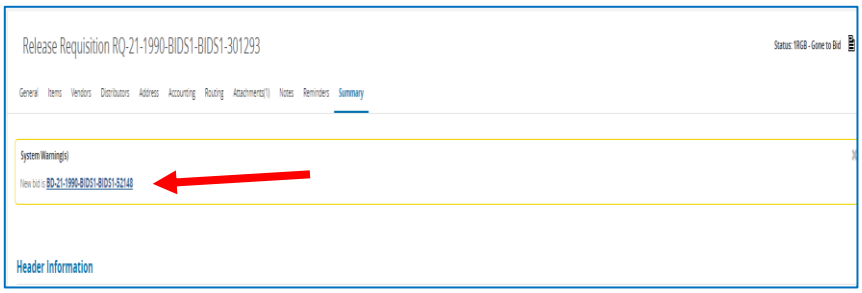
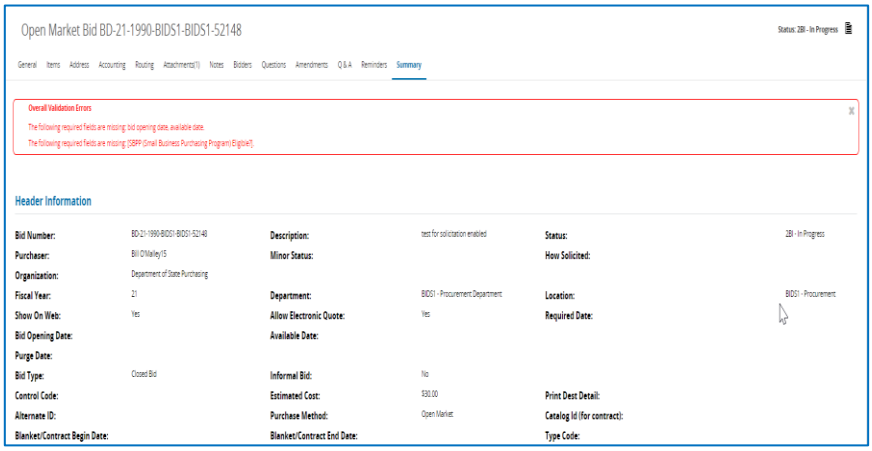
5. When the screen displays, the attached file will be listed next to the **Choose File** (or Browse) button. Click on the **Save & Continue** button.

6. Repeat this process if you have additional file attachments.

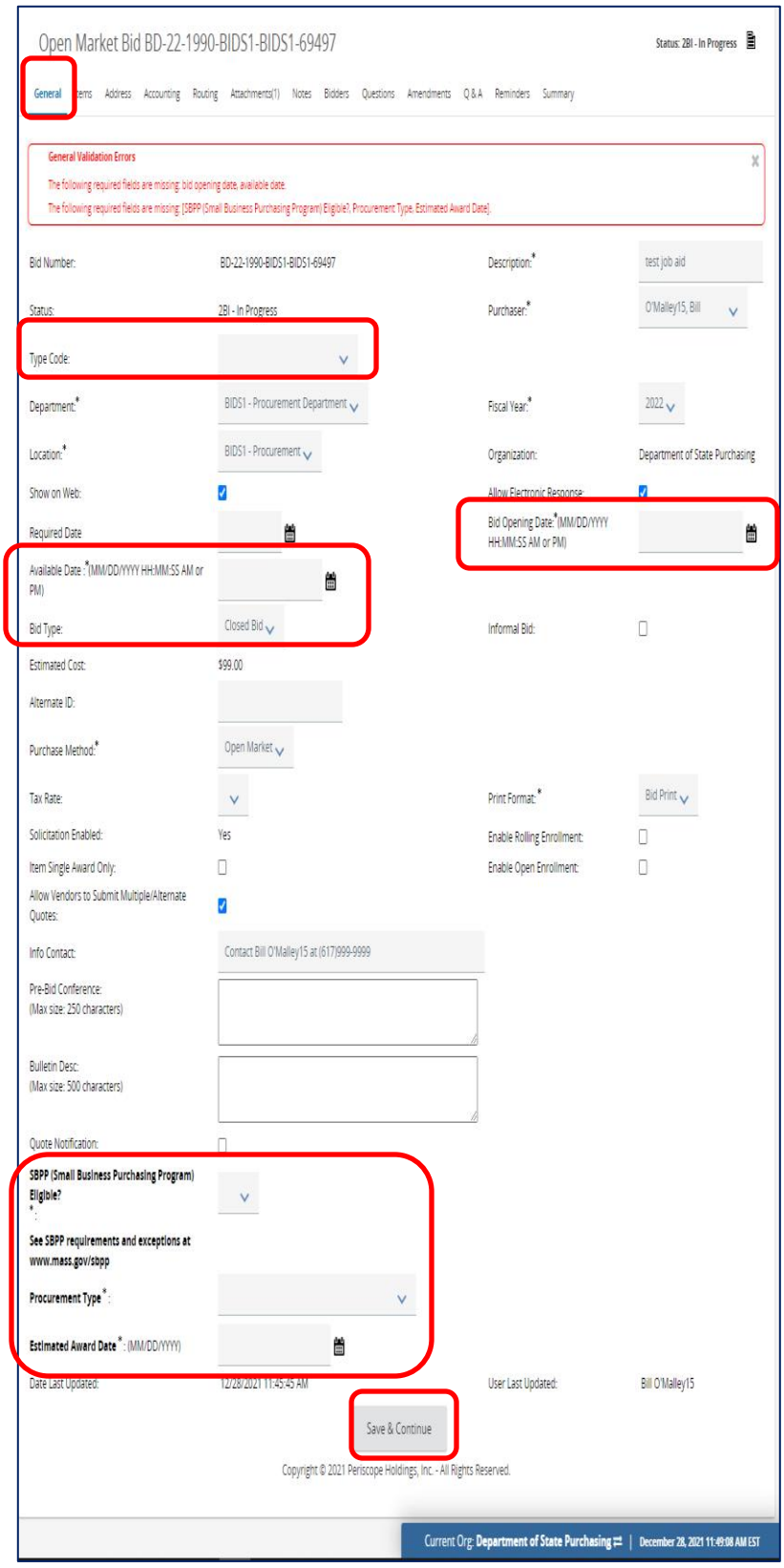
Screenshot	Directions
	**Step 13: Adding Notes** **NOTE:** The **Notes** and **Reminders** tabs are optional. If you wish to add a note, click on the **Notes** tab, enter a note in the text box, then click on the **Save & Continue** button. Notes can be viewed by yourself and anyone else in your work 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.
	**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	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.
 	**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. 2. A popup message displays. Click on the **OK** button.

Screenshot	Directions
	**Step 19: Opening the New Bid** The Release Requisition page redisplays 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.

Screenshot



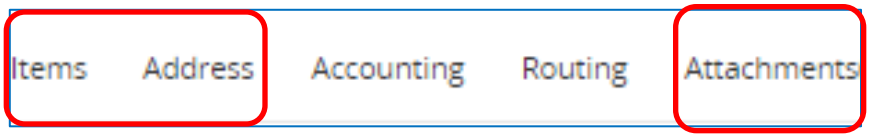
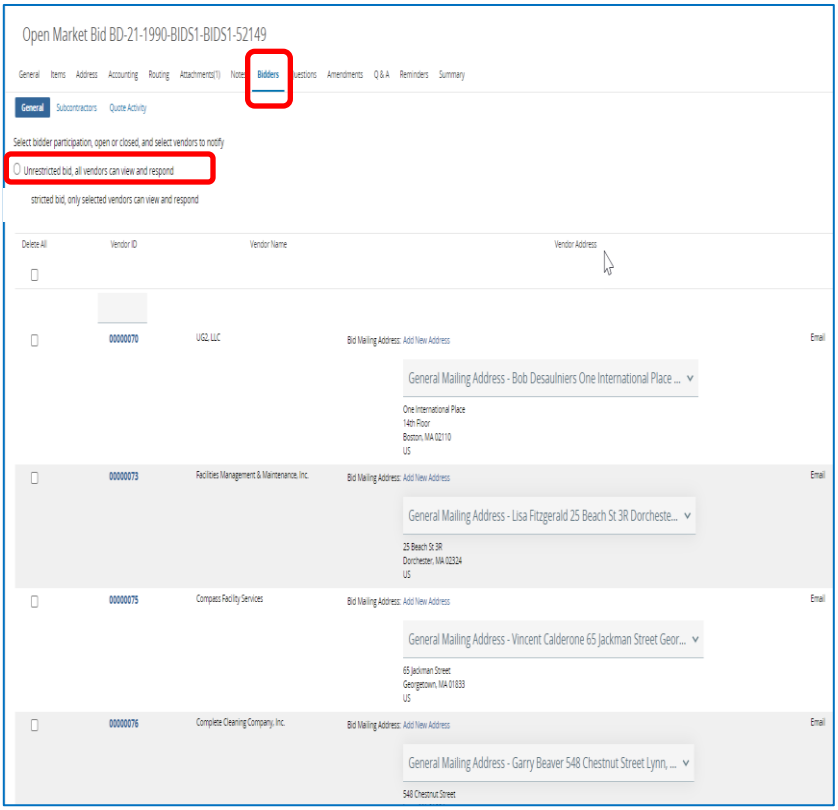
Directions

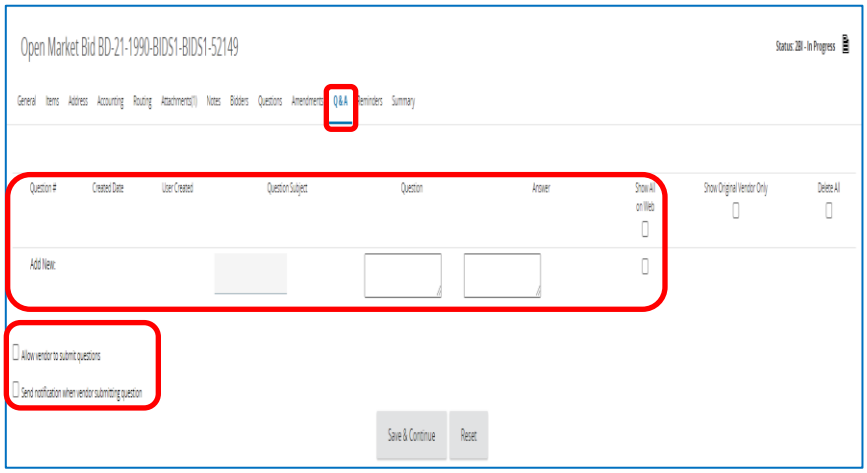
Step 20: Completing the General Tab

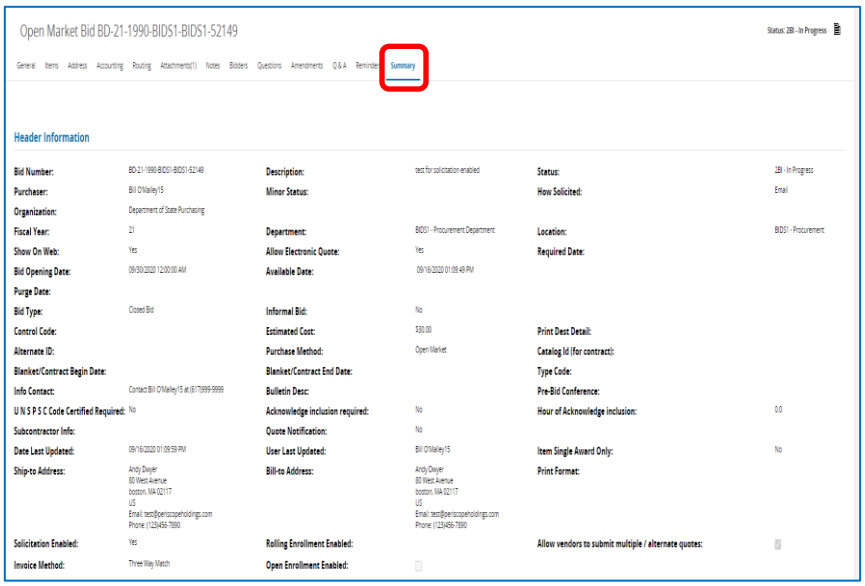
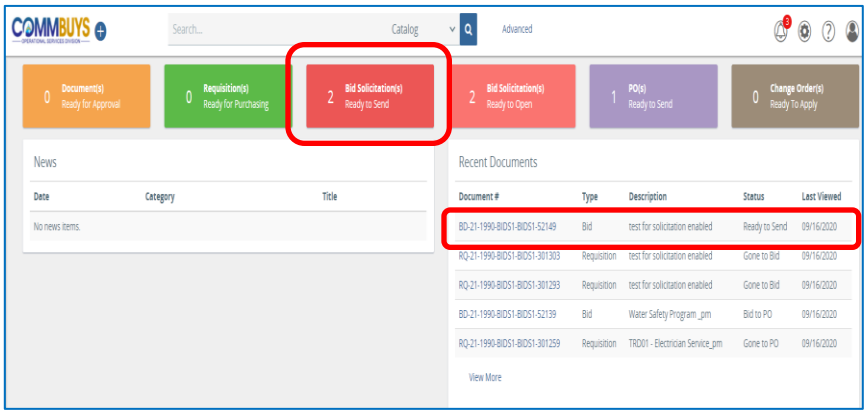
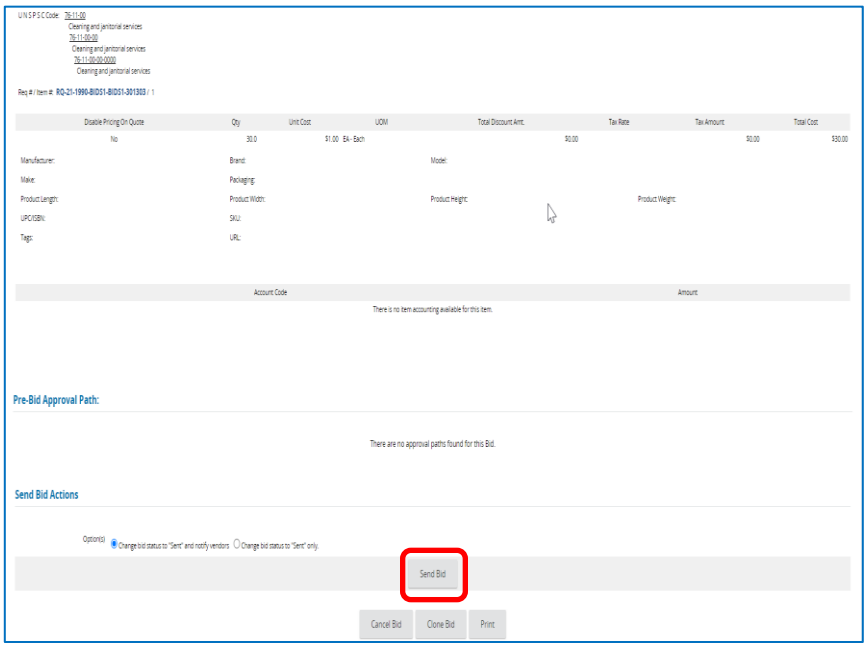
1. Click on the **General** tab. Complete the following fields:
   - **Type Code:** Select **SS** for a statewide contract.
   - **Available Date:** This field identifies when the bid becomes available for viewing. Clicking the calendar icon next to this field displays the current date and time. Clicking 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.

Screenshot	Directions
	**Step 21: Reviewing the Tabs** **I**nformation 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.

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
	**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.
	**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.
	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.