

Job Aid:

How to set up a Master Blanket Purchase Order (MBPO) using a Migrated Comm-PASS Contract

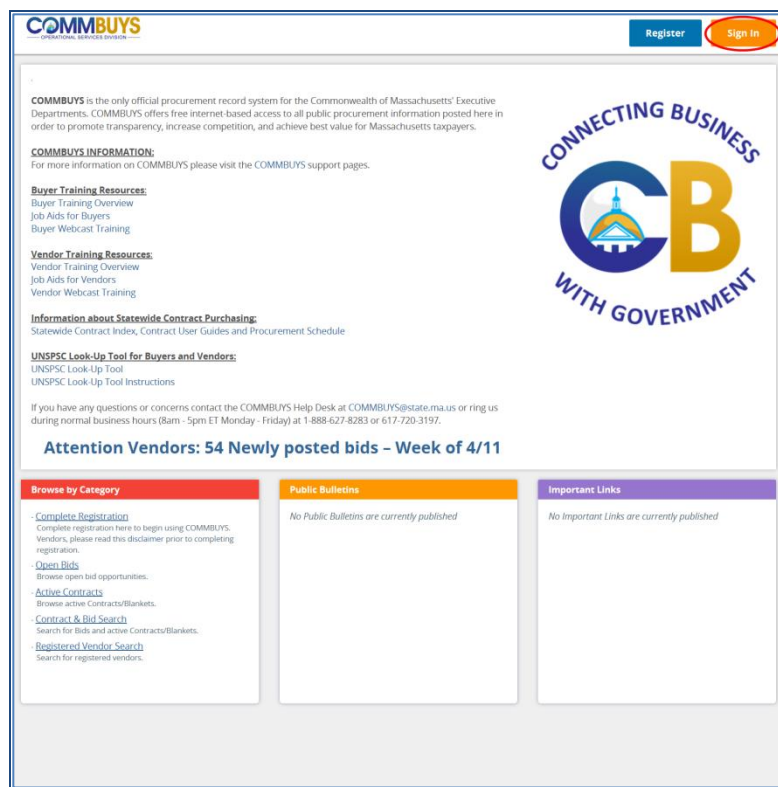
This Job Aid shows a Basic Purchasing user how to:

- Search for migrated departmental contracts
- Review and download attachments
- Clone migrated (vCurrent) blanket purchase orders (POs)
- Update an MBPO
- Submit a PO for approval and/or send a PO to a vendor

Of Special Note:

Comm-PASS documents (solicitations, contracts) were brought over into COMMBUYS in February 2014; however these documents require updating and review. **You must be a Basic Purchasing user with appropriate privileges for the organization that owns the migrated document to perform most of the steps outlined below.** Departments use three types of vendor (seller) contracts, and this Job Aid will focus on two – single-vendor-based and multi-vendor-based.

Screenshot



Directions

Step 1: Accessing the COMMBUYS Landing Page

1. Launch the COMMBUYS website by entering the URL (<https://www.commbuys.com>) in the browser or by clicking on the hyperlink [COMMBUYS](https://www.commbuys.com).
2. Click on the orange **Sign In** button in the upper right hand corner.

Job Aid:

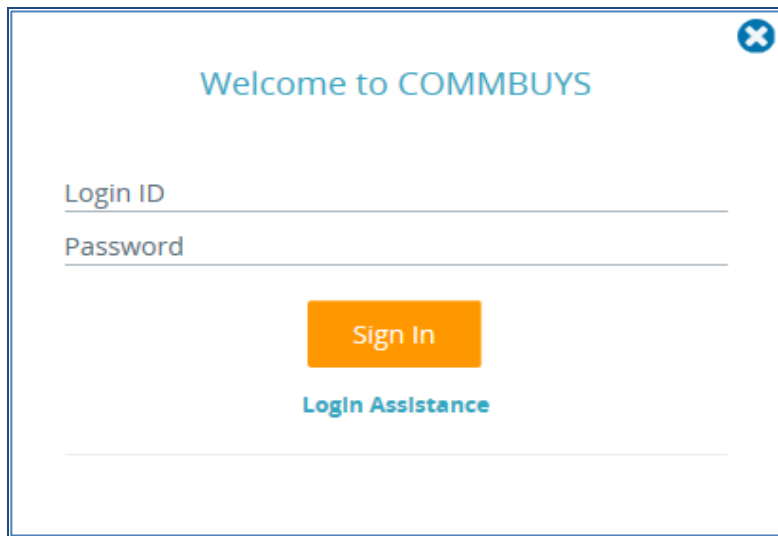
How to set up a Master Blanket Purchase Order (MBPO) using a Migrated Comm-PASS Contract

Screenshot

Directions

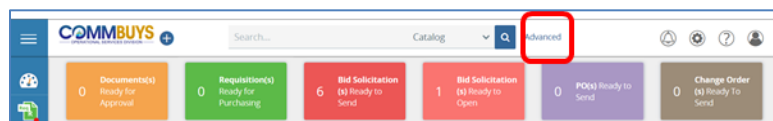
Step 2: Signing in to COMMBUYS

1. Enter your Login ID and Password and click on the **Sign In** button.



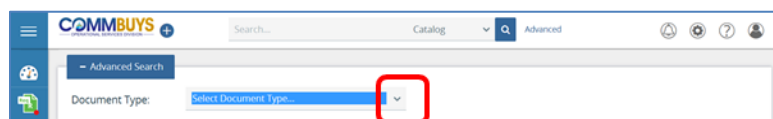
Step 3: Conducting an Advanced Search

To Search for migrated Blankets, click on the **Advanced** hyperlink next to the magnifying glass icon.



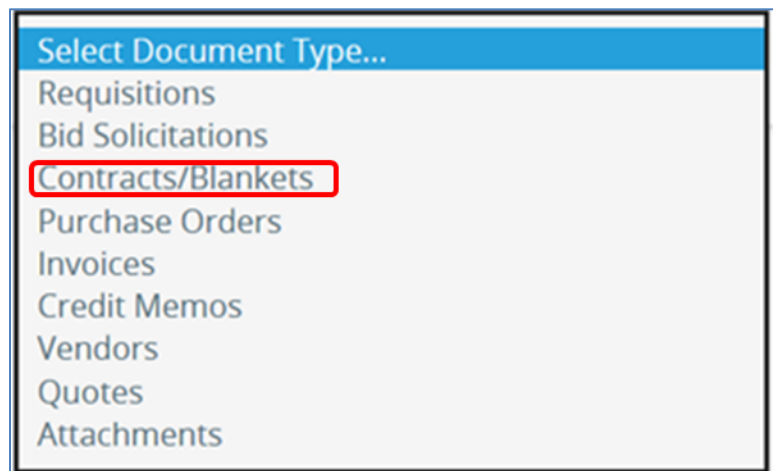
Step 4: Searching for Documents

Click on the **down arrow** next to Select Document Type in the Document Type field.



Step 5: Selecting Contracts/Blankets

When the dropdown menu displays, select **Contracts/Blankets**.



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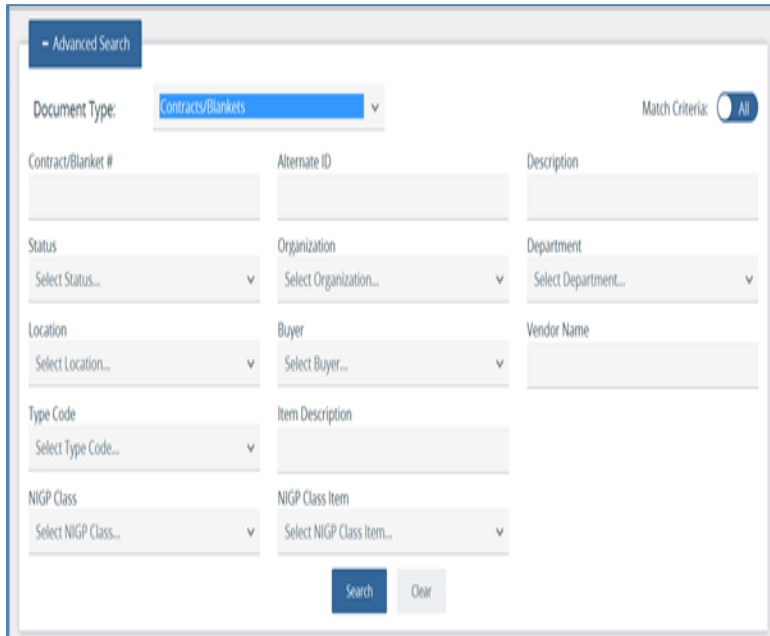
Step 6: Searching for a Contract/Blanket

1. Use any of the search criteria fields to search for the contract you are looking for:

- **Contract/Blanket #** is the Comm-PASS contract number. C###-vCurrent
- **Description** – may contain the SWC number
- **Vendor Name** - Conversion Vendor (all vCurrent Blankets will have the main Vendor name as Conversion Vendor)

If you are seeing too many results, including those with "c#" in the file name where "#" is a number, filter your results by clicking on the dropdown arrow next to the **Select Status** field and selecting "**Sent**" from the dropdown menu for a contract that was previously awarded in Comm-PASS, or select "**In-Progress**" if it was a draft at the time of migration.

2. Click on the **Search** button after entering the search information.



The screenshot shows an "Advanced Search" window with a "Document Type" dropdown set to "Contracts/Blankets". Below this are several search criteria fields arranged in a grid:

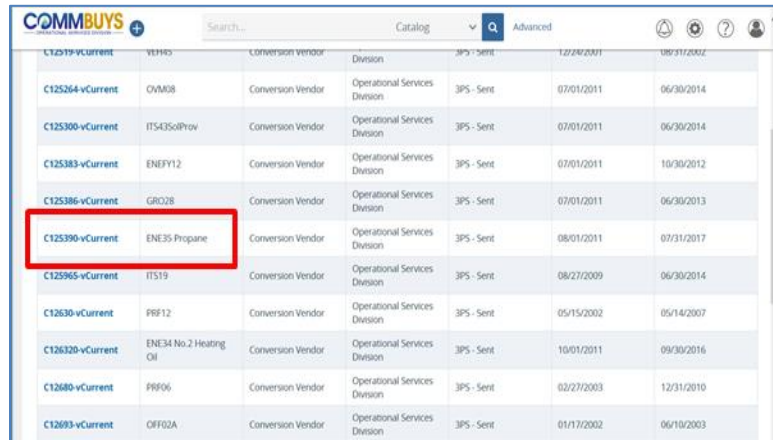
Contract/Blanket #	Alternate ID	Description
Status Select Status...	Organization Select Organization...	Department Select Department...
Location Select Location...	Buyer Select Buyer...	Vendor Name
Type Code Select Type Code...	Item Description	
NIGP Class Select NIGP Class...	NIGP Class Item Select NIGP Class Item...	

At the bottom right of the search criteria are "Search" and "Clear" buttons. A "Match Criteria" toggle is set to "All".

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Screenshot



Contract/Blanket #	Description	Vendor	Division	Status	Begin Date	End Date
C12519-vCurrent	VEH10	Conversion Vendor	Operational Services Division	3PS - Sent	12/28/2011	08/31/2012
C125264-vCurrent	OVM08	Conversion Vendor	Operational Services Division	3PS - Sent	07/01/2011	06/30/2014
C125300-vCurrent	ITS4350Prov	Conversion Vendor	Operational Services Division	3PS - Sent	07/01/2011	06/30/2014
C125383-vCurrent	ENEFFY12	Conversion Vendor	Operational Services Division	3PS - Sent	07/01/2011	10/30/2012
C125386-vCurrent	GRC08	Conversion Vendor	Operational Services Division	3PS - Sent	07/01/2011	06/30/2013
C125390-vCurrent	ENE35 Propane	Conversion Vendor	Operational Services Division	3PS - Sent	08/01/2011	07/31/2017
C125965-vCurrent	ITS17	Conversion Vendor	Operational Services Division	3PS - Sent	08/27/2009	06/30/2014
C12630-vCurrent	PRF12	Conversion Vendor	Operational Services Division	3PS - Sent	05/15/2002	05/14/2007
C126320-vCurrent	ENE34 No.2 Heating Oil	Conversion Vendor	Operational Services Division	3PS - Sent	10/01/2011	09/30/2016
C12680-vCurrent	PRF06	Conversion Vendor	Operational Services Division	3PS - Sent	02/27/2003	12/31/2010
C12693-vCurrent	OFF02A	Conversion Vendor	Operational Services Division	3PS - Sent	01/17/2002	06/10/2003

Directions

Step 7: Selecting the Contract

From the displayed results, select the desired **Statewide Contract/Blanket #**.

If you need to refine your search results after searching, press the “+” icon next to **Advanced Search** to display and edit your search criteria.

Select the “vCurrent” **Contract/Blanket #** link.

Result Columns:

- **Contract/Blanket #** – c#####-vCurrent is the converted contract record from Comm-PASS
- **Description** – Department Contract number/name from Comm-PASS
- **Vendor** – Conversion Vendor
- **Organization** – Name of the organization who owns the MBPO
- **Status** – 3PS Sent (Active MBPO)
- **Begin Date** – Start date of contract
- **End Date** – End date of contract



OPERATIONAL SERVICES DIVISION

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Screenshot

COMMBUYS Search... Catalog Advanced

Master Blanket Purchase Order C125390-vCurrent Status: BPS - Sent

Header Information

Purchase Order Number: C125390-vCurrent
 Status: BPS - Sent
 Fiscal Year: 2017
 Organization: Operational Services Division
 Department: 1080CONV - Default Data Conversion Department
 Alternate ID: 0
 Days ARD: 0
 Print Dest Detail: # Different
 Catalog ID:
 Contact Instructions: Sara Urias, Deputy Strategic Sourcing Services Lead, Address: Operational Services Division One Amburton Place, Room 1017 Boston, MA 02108, Phone: 617-220-3378, Email: sara.urias@state.ma.us
 Print Format:
 Solicitation Enabled: Yes
 Special Instructions:
 Alternate ID Instructions: PLACE THIS NUMBER ON ALL OSD DOCS

Release Number: 0
 Purchaser: Sara Urias
 PO Type: Blanket
 Location: 1080 - Default Data Conversion Location
 Entered Date: 06/30/2017 01:01:54 PM
 Retainage %: 0.00%
 Release Type: Standard Release - BPA Release Not Allowed
 Tax Rate:
 Short Description: ENR33 Prepare Quantity
 Receipt Method: Minor Status:
 Type Code: Statewide Contract
 Control Code:
 Discount %: 0.00%
 Picard Enabled: No
 Actual Cost: \$0.00

Attachments

Agency Files: FinalENR33Program051211 C125390-vCurrent OSD also ENR33 Contract User Guide September 2015
 Agency Forms:
 Vendor Files:
 Vendor Forms:

Primary Vendor Information & PO Terms

Vendor: 99900000 - Conversion Vendor One Amburton Place Room 1017 Boston, MA 02108 Email: vendbpa@percip Holdings.com Phone: 1234567890 ext. 1014
 Payment Terms:
 Shipping Method:
 Shipping Terms:
 Freight Terms:

Master Blanket/Contract Vendor Distributor List

Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Vendor Distributor Status
300313		Osterman Property LLC		Inactive

Master Blanket/Contract Controls

Master Blanket/Contract Begin Date: 08/01/2017 Master Blanket/Contract End Date: 03/31/2017
 Cooperative Purchasing Allowed: Yes

Organization	Department	Dollar Limit	Dollars Spent to Date	Minimum Order Amount
ALL ORG - Organization Umbrella Master Control	ASD - Agency Umbrella Master Control	\$0.00	\$0.00	\$0.00

Vendor Performance Documents

There are no vendor performance documents.

Invoice Information

There are no invoices.

Item Information

Approval Path:

There are no approval paths found for this purchase order.

Cancel PO Close PO Print Print Vendor Copy

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Current Org: Operational Services Division 25 | January 26, 2017 2:06:48 PM EST

Directions

Step 8: Editing the Summary Page

The Master Blanket Purchase Order # (MBPO) vCurrent Information displays.

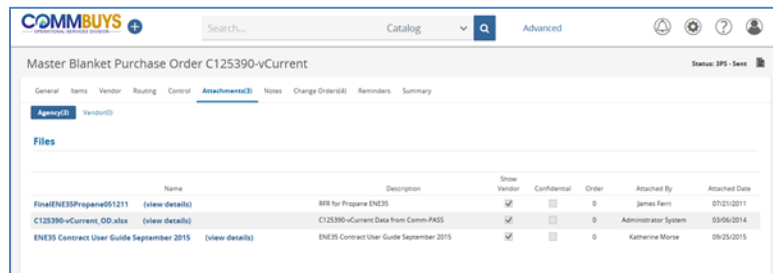
This page is broken into headings:

- **Header Information:** general contract information
 - **Organization**
 - **Department**
 - **Location**
 - **Contact Instructions**
 - **Status**
 - **Type Code**
 - Statewide
 - Non-Statewide
 - **Solicitation Enabled** – checkbox that determines whether this is a catalog vs. a blanket used for future Bids for pricing not specified in a catalog.
- **Attachments:** all attached files and templates for the MBPO
- **Primary Vendor Information & PO Terms:** Conversion Vendor holds the place as a primary Vendor for the departmental contract
- **Master Blanket/Contract Vendor Distributor List:** the vendors are not listed active for this COMMBUYS MBPO
- **Master Blanket Contract Controls:** beginning and end date for the contract, as well as who can use the contract
- **Vendor Performance Documents: N/A**
- **Invoice Information: N/A**
- **Item information:** converted information was placed in the line item description and will need to be corrected by the department
- **Approval Path:** displays the approvers who were on the approval path for the creation of the MBPO

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Screenshot



Name	Description	Show Vendor	Confidential	Order	Attached By	Attached Date
FinalENE35Proposed051211 (view details)	RFR for Propane ENE35	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	James Fern	07/21/2011
C125390-vCurrent_OD.xlsx (view details)	C125390-vCurrent Data from Comm-PASS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	Administrator System	03/06/2014
ENE35 Contract User Guide September 2015 (view details)	ENE35 Contract User Guide September 2015	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	Katherine Morse	09/25/2015

Directions

Step 9: Reviewing the Attachments Tab

The **Attachments** tab is where you will find all key contract information. In this example, we see the RFR and contract amendments. All attachments will need to be uploaded to the new Purchase Order.

The orphan data file is the only attachment that will clone over into the new MBPO.

- The attachment C125390-vCurrent_OD.xlsx, is the Orphan Data attachment. Every converted document from Comm-PASS will have an attachment for any Comm-PASS data that did not match in COMMBUYS. It contains information from Comm-PASS that is not displayed in COMMBUYS.

To open and download a file, click on the blue hyperlinked name.

Step 10: Opening the File

This message displays when you click the file name. To open the document, click on the **Open** button.

Only the orphan data file attachment will copy over into the new MBPO. Download and save to the desktop all other files. After any updates or edits are completed, upload any relevant attachments to the new MBPO.



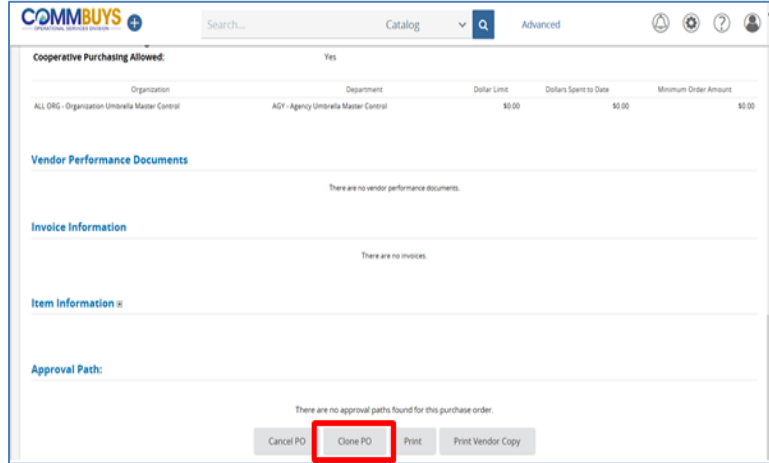
Do you want to open or save C5260-vCurrent_OD.xlsx from test.commbuys.com?

Open Save Cancel

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Screenshot



The screenshot shows the COMMbuys interface. At the top, there's a search bar and navigation tabs. Below, there's a table with columns: Organization, Department, Dollar Limit, Dollars Spent to Date, and Minimum Order Amount. The table shows 'ALL ORG - Organization Umbrella Master Control' and 'ADY - Agency Umbrella Master Control'. Below the table, there are sections for 'Vendor Performance Documents', 'Invoice Information', 'Item Information', and 'Approval Path'. At the bottom, there are buttons: 'Cancel PO', 'Clone PO' (highlighted with a red box), 'Print', and 'Print Vendor Copy'.

Directions

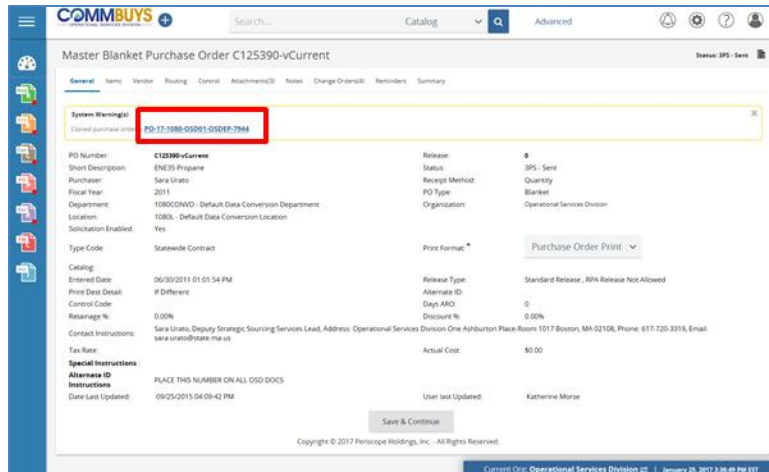
Step 11: Cloning the PO

Return to the **Summary** tab and scroll down to the bottom of the page. Click on the **Clone PO** button.

Clone the purchase order **once for each** Vendor in a Line Item catalog. Clone the PO only **once for all** vendors in a Distributor catalog.

Step 12: Accessing the Cloned PO

1. When the screen re-displays, a System Warning displays in a yellow box at the top of your screen.
2. Click on the blue hyperlink for the newly cloned PO number.

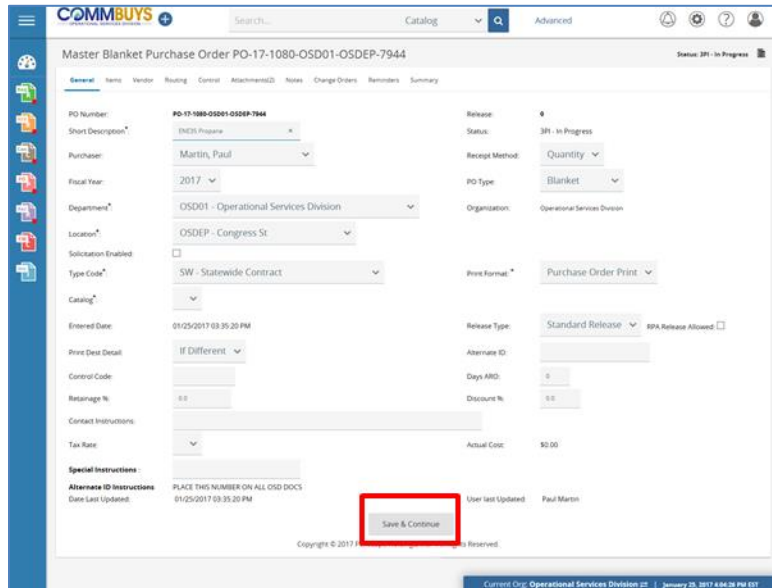


The screenshot shows the 'Master Blanket Purchase Order C125390-vCurrent' page. At the top, there's a 'System Warning' box with a yellow background and a red border, containing the text 'Cloned purchase order: PO-17-1088-01201-0508P-7944'. Below the warning, there's a table with various fields: PO Number, Short Description, Purchaser, Fiscal Year, Department, Location, Solicitation Enabled, Type Code, Catalog, Entered Date, Print Desc Detail, Control Code, Resequence N, Contact Instructions, Tax Rate, Special Instructions, Alternate ID, and Date Last Updated. The 'PO Number' field is highlighted with a red box. At the bottom, there's a 'Save & Continue' button.

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Screenshot



Directions

Step 13: Editing the General Tab

The Summary page displays. Click on the **General** tab to display the cloning result. Notice that a new MBPO number is generated.

You are able to edit many information fields on this screen including:

- **Short Description:** use this space to enter your agency's contract numbering information, as well as a few key words for easy searching
- **Release Type:**
 - **Direct Release:** a single vendor blanket with specific pricing; select if you would like the order (PO) to be ready to send to the vendor once the requisition is approved
 - **Standard Release:** used for any blanket with or without pricing, select if you would like the order (PO) to require an second approval for the PO and or to request quotes from the vendor(s) on the MBPO. Multi-Vendor based blankets require "Standard Release".
 - **RPA Only Release:** To be used only for situations that require the immediate acquisition of a commodity or service

If the blanket will serve as a multi-vendor contract used for conducting bids to get pricing for specific orders, be sure to select the **Solicitation-Enabled** checkbox and instruct users to create **Solicitation Enabled release requisitions** when ordering from this contract.

In some cases, departments may choose not to check off "Solicitation Enabled" on a distributor blanket. One example of such a contract is a true distributor situation, where all the vendors are selling the same products at the same pricing.

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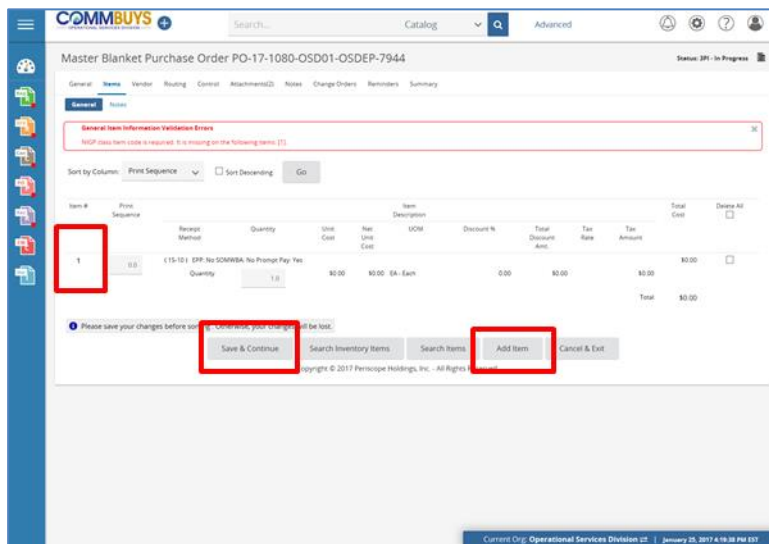
Directions

- **Type Code:** select from the drop down menu
 - SH – Historical Contract
 - NS - Non-Statewide/Limited User Contract
 - SS - Statewide Contract: only for authorized and OSD-issued contracts.
- **Contact Instructions:** enter contract contact information in the open field

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

Step 14: Editing the Items Tab

1. Click on the **Items** tab.
2. If the item(s) will not change, click on the Item # blue hyperlink and edit the commodity code information to eliminate the red validation message.
3. Click on the **Save & Continue** button.
4. To delete the existing item and / or add additional items, click on the **Add Item** button.



Master Blanket Purchase Order PO-17-1080-OSD01-OSDEP-7944

Status: BFI - In Progress

General Item Information Validation Error

NSP class item code is required. It is missing on the following items: [1]

Item #	Print Sequence	Revised Method	Quantity	Unit Cost	Net Unit Cost	Item Description	Discount %	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost	Delete All
1	0.0	175-101 ERP No SOW/BA No Prompt Pay Yes	Quantity	1.0	\$0.00	\$0.00 EA-Each	0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Total											\$0.00	

Please save your changes before clicking on the Save & Continue button. If you do not, your changes will be lost.

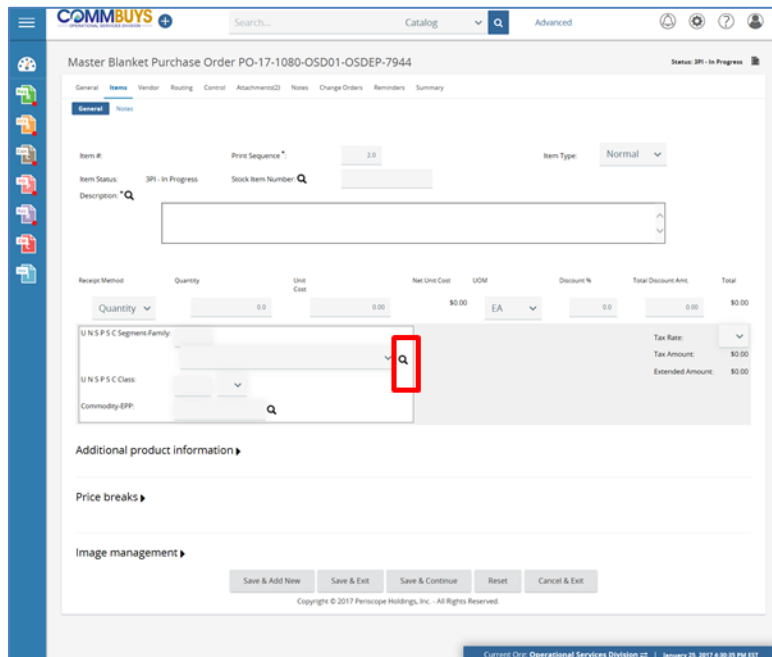
Save & Continue Search Inventory Items Search Items Add Item Cancel & Exit

Current Org: Operational Services Division 07 January 05, 2017 4:19:38 PM 001

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Screenshot



Directions

Step 15: Adding an Item

The **Add Item** button opens a new screen to enter "item" detail.

Enter/Select the following:

- **Description:** good/service description; up to 400 characters
- **Receipt method:** quantity or dollars; choose based on receiving needs for the blanket
- **Quantity:** (at least 1) make sure it is relevant to the receipt method
- **Unit cost:** cost associated with the item/service per unit (can leave 0 to allow buyer to enter information)
- **UOM** (Unit of Measure): choose from drop down

If this is a multi-vendor blanket, the description should be specific enough to determine what the purchaser is asking the vendors to provide quote information for.

- It is recommended you indicate that users should create a Solicitation Enabled requisition when ordering this item.
- In a single vendor PO, use the item section to define specific products or services, the related UNSPSC codes and pricing information.
- If pricing varies based on an item attribute, create separate items with distinct pricing.
- If you need users to be able to enter quoted prices, leave the price blank and instruct them to enter pricing and edit or add to the description on their release requisitions so that the vendor knows what buyers are ordering.

Click the **magnifying glass icon** to search and select the UNSPSC code.

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How to set up a Master Blanket Purchase Order (MBPO) using a Migrated Comm-PASS Contract

Screenshot

Directions

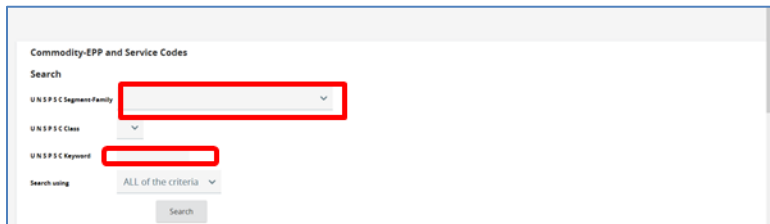
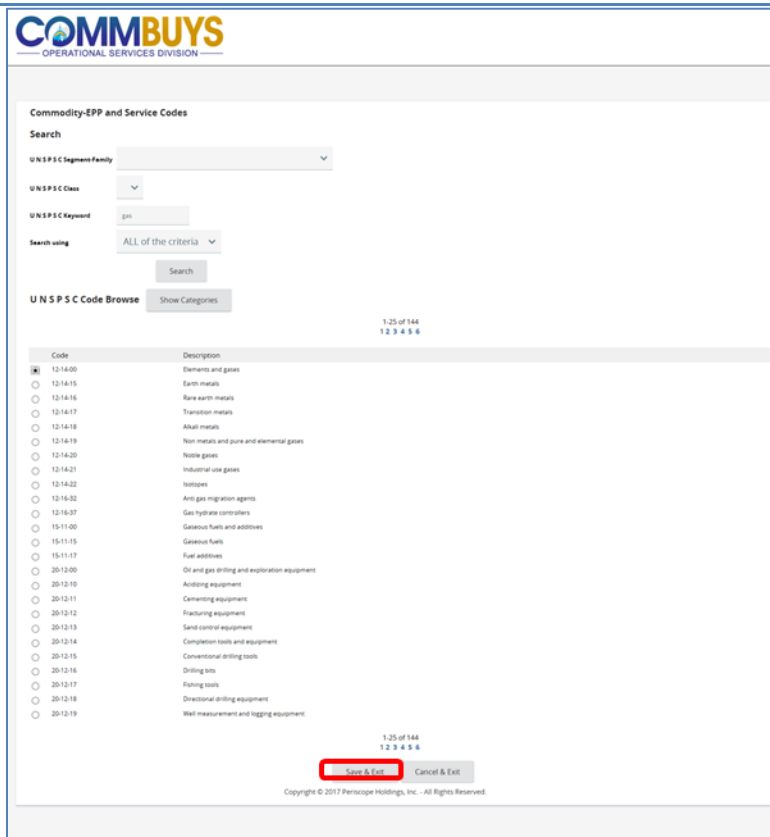
Step 16: Searching for the UNSPSC

Use the pop-up window to search for a UNSPSC.

1. Enter a keyword or select a UNSPSC Segment/Family
2. Click on the **Search** button.

Step 17: Selecting the Commodity Code

1. Select the **radio button** next to the appropriate code.
2. Click on the **Save & Exit** button.

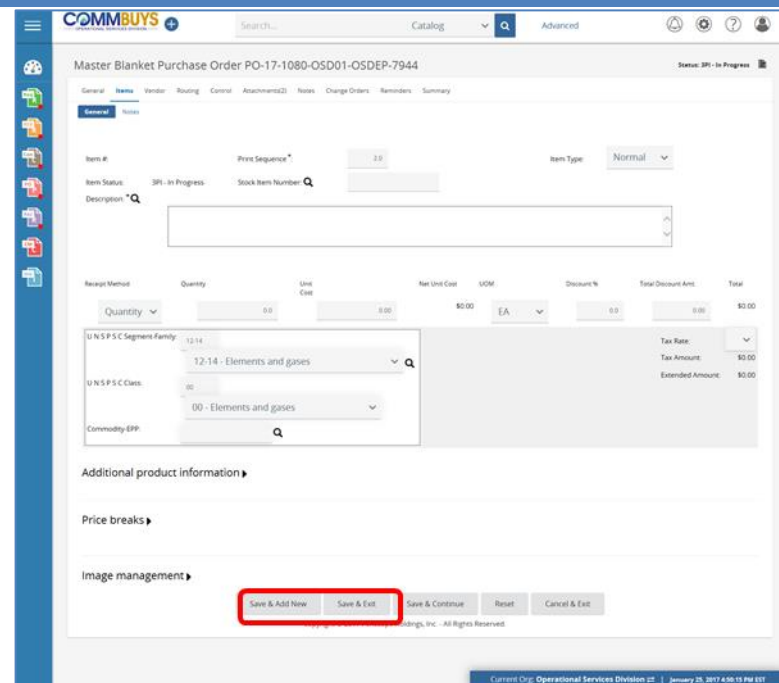



Code	Description
<input checked="" type="radio"/> 12-14-00	Elements and gases
<input type="radio"/> 12-14-15	Earth metals
<input type="radio"/> 12-14-16	Rare earth metals
<input type="radio"/> 12-14-17	Transition metals
<input type="radio"/> 12-14-18	Alkali metals
<input type="radio"/> 12-14-19	Non-metals and pure elemental gases
<input type="radio"/> 12-14-20	Noble gases
<input type="radio"/> 12-14-21	Industrial use gases
<input type="radio"/> 12-14-22	Isotopes
<input type="radio"/> 12-16-32	Anti-gas migration agents
<input type="radio"/> 12-16-37	Gas hydrate controllers
<input type="radio"/> 15-11-00	Gaseous fuels and additives
<input type="radio"/> 15-11-15	Gaseous fuels
<input type="radio"/> 15-11-17	Fuel additives
<input type="radio"/> 20-12-00	Oil and gas drilling and exploration equipment
<input type="radio"/> 20-12-10	Auxiliary equipment
<input type="radio"/> 20-12-11	Compressing equipment
<input type="radio"/> 20-12-12	Fracturing equipment
<input type="radio"/> 20-12-13	Sand control equipment
<input type="radio"/> 20-12-14	Completion tools and equipment
<input type="radio"/> 20-12-15	Conventional drilling tools
<input type="radio"/> 20-12-16	Drilling bits
<input type="radio"/> 20-12-17	Finishing tools
<input type="radio"/> 20-12-18	Directional drilling equipment
<input type="radio"/> 20-12-19	Well measurement and logging equipment

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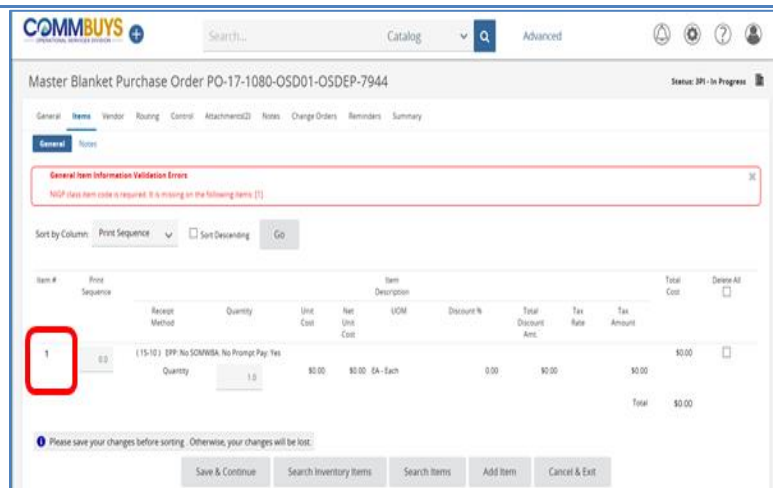
Screenshot



Directions

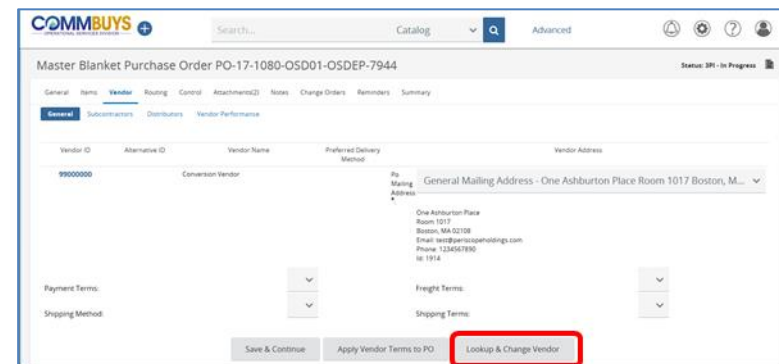
Step 18: Completing the Items Tab

Once you are finished entering information for the item/service, click either the **Save & Exit** button, or the **Save & Add New** button to enter more line items for the contract.



Step 19: Editing an Item

The layout shown here is how COMMBUYS displays items and services (including those who have not logged in). To edit an item you have already entered, click the item number link.



Step 20: Searching for Vendors

1. Click on the **Vendor** Tab.
2. Click on the **Look Up & Change Vendor** button.

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Screenshot

Lookup & Change Vendor - Master Blanket Purchase Order PO-17-1080-OSD01-OSDEP-7944

Vendor Lookup

Search Using: ALL of the criteria

Find It Clear

Search Fields:

Vendor ID: Vendor Name:

Vendor Tax ID: Vendor Legal Name:

Vendor Keyword: Alternate ID:

ZIP Code: County:

State: v

Emergency Suppliers: v

UNSPSC Segment Family: v

UNSPSC Class: v

UNSPSC Keyword: v

Disadvantaged Business Enterprise: No Certified v

DOB Category: No Certified v

DUNS Number: This is the DUNS number assigned to my Business

Environmentally Preferable Product: No v

Directions

Step 21: Finding a Vendor

Enter your Search criteria and click on the **Find It** button.

Step 22: Selecting a Vendor

Click on the **radio button** for the desired vendor. If you do not see the vendor you are looking for, try searching again or contact the vendor to see if they are registered.

You cannot add unregistered vendors to a PO in COMMBUYS.

Then click on the **Change Vendor** button.

Lookup & Change Vendor - Master Blanket Purchase Order PO-17-1080-OSD01-OSDEP-7944

Vendor Lookup

Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date	Address	City	State	Contact Name	Phone
<input type="radio"/>	000146	A and A Industrial Supply - HALBRO Fastener, Inc.		Jul 14, 2016		792 Main Street	Tewksbury	MA	Test Nostre Morang, Sr.	(123)456-7890
<input type="radio"/>	00014601	A-1 Parts, Inc.		Feb 9, 2016		26 West Main St	Brewsterfield	MA	Matthew Graves	(123)456-7890
<input type="radio"/>	0003953	Allen's Seed				493 South County Trail	Storrs	CT	Eric Hagenstrom	(123)456-7890
<input type="radio"/>	00020913	Barr		Nov 10, 2016		2 Oakland Dr	Camden	MA	Edward Blane	(978)555-8888
<input type="radio"/>	00004813	Certified Laboratories		Jul 14, 2015		1300 E Northgate	Irvine	TX	Bob Manager	(123)456-7890
<input type="radio"/>	00020913	Chaville		Sep 28, 2016		3 Maple St	Burlington	MA	David Desville	(508)555-8888
<input type="radio"/>	0000779	Desal Direct		Sep 2, 2016		74 Maple Street	Stoughton	MA	Randal Fee	(123)456-7890
<input type="radio"/>	15013325	dmp supply company inc				21 bramble ave	west springfield	MA	donald delucos	(123)456-7890
<input type="radio"/>	000663	Granger		Jul 12, 2016		78 Jefferson Bld	Warwick	RI	Maurice Grillo	(123)456-7890
<input checked="" type="radio"/>	00020912	Kramencia		Nov 29, 2016		1 Main St	Waltham	MA	Cosmo Kramer	(617)555-9999
<input type="radio"/>	00019487	M. K. Hoffman Associates, Inc.				142A Union Avenue	Lynbrook	NY	Marc Hoffman	(123)456-7890
<input type="radio"/>	00015600	Manfield Power and Gas, LLC				1025 Airport Parkway SW	Gainesville	GA	MPG Bots	(123)456-7890
<input type="radio"/>	00000901	Michael Papp Desk				1 Arlington Place	Boston	MA	Michael Evers	(123)456-7890
<input type="radio"/>	00011938	On-Bow Marina, Inc.				180 Island Road	Northampton	MA	Shelley Anderson	(123)456-7890
<input type="radio"/>	213128	Parts Unlimited Automotive Warehouse d.b.a. Fastlane NAPA		Mar 13, 2015		132 Washington Street	Foxboro	MA	Roger Parent	(123)456-7890
<input type="radio"/>	00004473	Petroleum Traders Corporation				7120 Paines Inverness Way	Fort Wayne	IN	Gayle Newton	(123)456-7890
<input type="radio"/>	00019954	Servo Space		Aug 3, 2016		One Ashburton	Boston	MA	Servus Lee	(617)777-7777
<input type="radio"/>	300035	Servo Battery Energy, Inc.		Apr 14, 2016		154 Admiral St	Bridgeport	CT	Nicholas Catalano	(123)456-7890
<input type="radio"/>	300236	Southwest Mills, Inc.		Apr 6, 2016		84 Concord St	North Reading	MA	Tom Benedetti Jr	(123)456-7890
<input type="radio"/>	00015082	Spresso Natural Gas				160 State Street	Boston	MA	Susan Kern	(123)456-7890

Change Vendor Close Window

Step 23: Searching for Distributors

If this is a distributor catalog, select the Conversion Vendor as your general Vendor, in the step above.

Click on the **Distributors** sub tab to add vendors on the contract.

NOTE: The Conversion Vendor acts as an overall placeholder for the contract and allows you to enter all departmental contract vendors on the MBPO without showing favoritism.

COMMBUYS

Search... Catalog Advanced

Master Blanket Purchase Order PO-17-1080-OSD01-OSDEP-7944

Status: (39) - In Progress

General Items Vendor Routing Control Attachments(2) Notes Change Orders Reminders Summary

Subcontractors Distributors Vendor Performance

Vendor ID: 00030012 Alternate ID: Vendor Name: Kramencia Preferred Delivery Method: Email: General Mailing Address: Cosmo Kramer 1 Main St, Waltham, MA 02451-0001 Phone: (617)555-9999

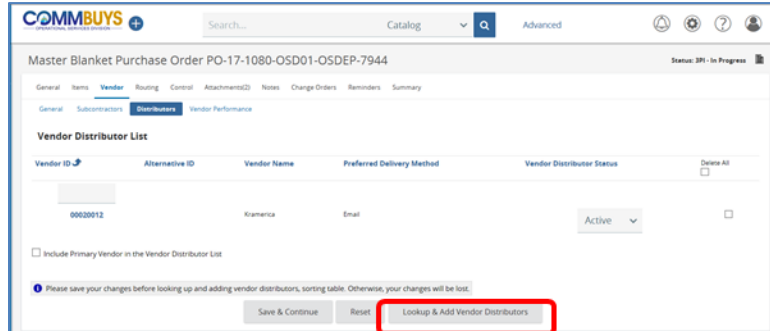
Payment Terms: Shipping Method: Freight Terms: Shipping Terms:

Save & Continue Apply Vendor Terms to PO Lookup & Change Vendor

Job Aid:

How to set up a Master Blanket Purchase Order (MBPO) using a Migrated Comm-PASS Contract

Screenshot



Master Blanket Purchase Order PO-17-1080-OSD01-OSDEP-7944

Vendor Distributor List

Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Vendor Distributor Status	Delete All
00020012		Kramercia	Email	Active	<input type="checkbox"/>

☐ Include Primary Vendor in the Vendor Distributor List

Please save your changes before looking up and adding vendor distributors, sorting table. Otherwise, your changes will be lost.

Save & Continue Reset **Look Up & Add Vendor Distributors**

Directions

Step 24: Looking Up Distributors

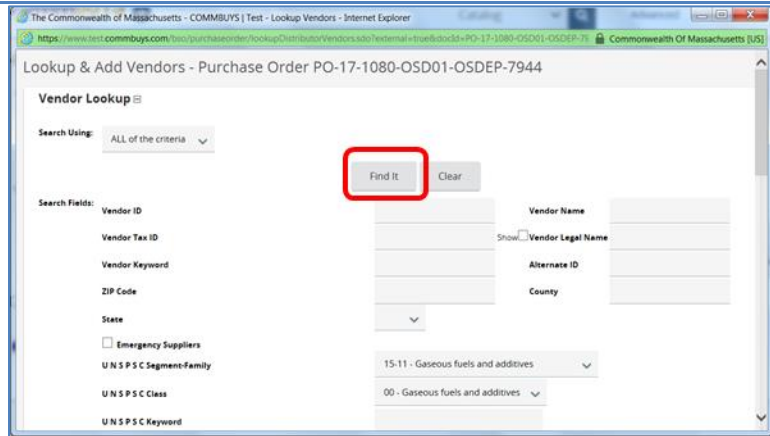
Click on the **Look Up & Add Vendor Distributors** button.

Step 25: Finding Distributors

A Vendor Search pop up window displays.

Search for the Vendors on the contract, the search will only return registered COMMBUYS vendors.

Click on the **Find It** button.



Look Up & Add Vendors - Purchase Order PO-17-1080-OSD01-OSDEP-7944

Vendor Lookup

Search Using: ALL of the criteria

Find It Clear

Search Fields:

Vendor ID
Vendor Tax ID
Vendor Keyword
ZIP Code
State
☐ Emergency Suppliers
UNSPSC Segment Family
UNSPSC Class
UNSPSC Keyword

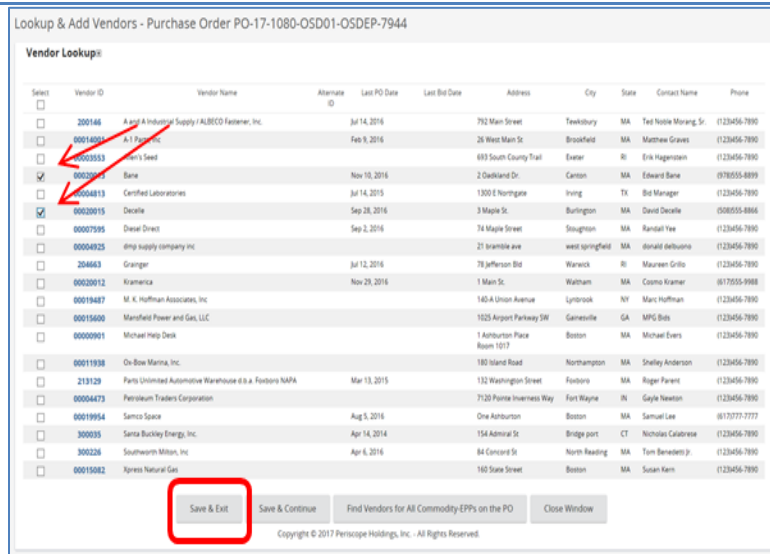
Vendor Name
Show Vendor Legal Name
Alternate ID
County

15-11 - Gaseous fuels and additives
00 - Gaseous fuels and additives

Step 26: Selecting Distributors

You will need to search for the vendors one by one using their name.

Click on the **Save & Exit** button once complete.



Look Up & Add Vendors - Purchase Order PO-17-1080-OSD01-OSDEP-7944

Vendor Lookup:

Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date	Address	City	State	Contact Name	Phone
<input type="checkbox"/>	200146	A and A Industrial Supply / ALBECO Fastener, Inc.		Jul 14, 2016		792 Main Street	Tewksbury	MA	Test Nostle Morang Sr	(123456-7890)
<input type="checkbox"/>	00014093	A-1 Fasteners, Inc.		Feb 9, 2016		26 West Main St	Broadfield	MA	Matthew Graves	(123456-7890)
<input type="checkbox"/>	00003553	Allen's Seed				693 South County Trail	Essex	RI	Erik Hagenstrom	(123456-7890)
<input checked="" type="checkbox"/>	00000003	Bane		Nov 10, 2016		2 Oakland Dr.	Centon	MA	Edward Bane	(978555-8899)
<input type="checkbox"/>	00004813	Certified Laboratories		Jul 14, 2015		1300 E Northgate	Irvine	TX	Bob Manager	(123456-7890)
<input checked="" type="checkbox"/>	00020015	Decale		Sep 28, 2016		3 Maple St.	Burlington	MA	David Decale	(508555-8866)
<input type="checkbox"/>	00007595	Diesel Direct		Sep 2, 2016		74 Maple Street	Southington	MA	Randal Yee	(123456-7890)
<input type="checkbox"/>	00004925	Emp supply company inc				21 Bramble ave	West Springfield	MA	donald delbucino	(123456-7890)
<input type="checkbox"/>	204663	Granger		Jul 12, 2016		78 Jefferson Rd	Warwick	RI	Maurice Grillo	(123456-7890)
<input type="checkbox"/>	00030012	Kramercia		Nov 29, 2016		1 Main St.	Waltham	MA	Cosmo Kramer	(617555-9988)
<input type="checkbox"/>	00019487	M. H. Hoffman Associates, Inc.				140-A Union Avenue	Lynbrook	NY	Marc Hoffman	(123456-7890)
<input type="checkbox"/>	00015600	Manfield Power and Gas, LLC				1025 Airport Parkway SW	Geneseeville	GA	MPC Bels	(123456-7890)
<input type="checkbox"/>	00000951	Michael Help Desk				1 Ashburton Place	Boston	MA	Michael Evers	(123456-7890)
<input type="checkbox"/>	00011938	Ox-Bow Marina, Inc.				180 Island Road	Northampton	MA	Shelley Anderson	(123456-7890)
<input type="checkbox"/>	213129	Pony Unlimited Automotive Warehouse d/b/a Rodora NAPA		Mar 13, 2015		132 Washington Street	Easton	MA	Roger Parent	(123456-7890)
<input type="checkbox"/>	00004673	Petroleum Traders Corporation				7120 Pontiac Inverness Way	Fort Wayne	IN	Gayle Newton	(123456-7890)
<input type="checkbox"/>	00019954	Samco Space		Aug 5, 2016		One Ashburton	Boston	MA	Samuel Lee	(617555-7777)
<input type="checkbox"/>	300035	Sanco Buckley Energy, Inc.		Apr 14, 2014		154 Admiral St	Bridgeport	CT	Nicholas Calabrese	(123456-7890)
<input type="checkbox"/>	300028	Southworth Mills, Inc.		Apr 6, 2016		84 Concord St	North Reading	MA	Tom Benedetti Jr.	(123456-7890)
<input type="checkbox"/>	00015082	Xpress Natural Gas				160 State Street	Boston	MA	Susan Kern	(123456-7890)

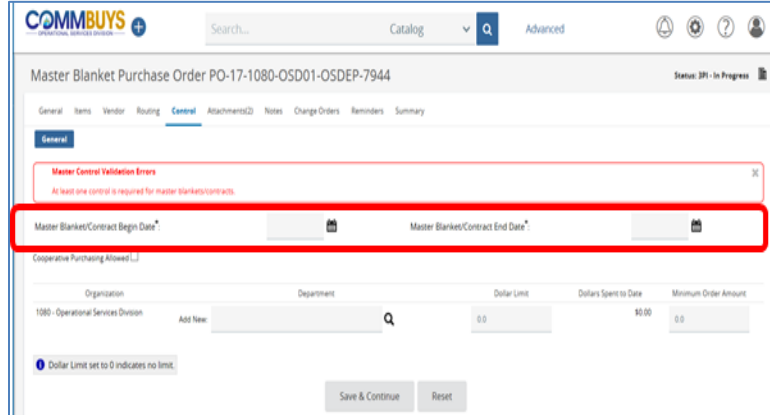
Save & Exit Save & Continue Find Vendors for All Commodity-EPNs on the PO Close Window

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Job Aid:

How to set up a Master Blanket Purchase Order (MBPO) using a Migrated Comm-PASS Contract

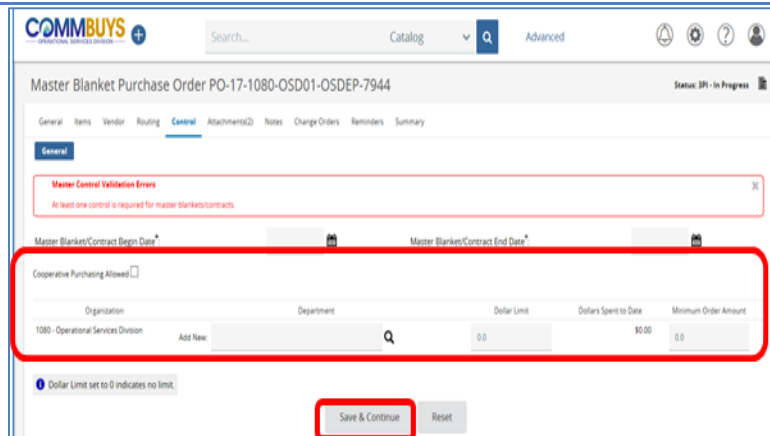
Screenshot



Directions

Step 27: Editing the Contract Dates

1. Click on the **Control** tab.
2. Enter the Master Blanket Contract Begin and End Dates.



Step 28: Editing the Organizations

Next add the organization(s) that can use the MBPO in accordance with the negotiated contract.

Click on the **magnifying glass icon** to select the Department(s) from your organization who will need to use this contract, or select **Agency Umbrella Master Control** to select all departments in your organization.

If you are contractually allowed to add another organization, select the organization by clicking on the magnifying glass icon to search for the organization and department. You can also set a dollar limit or minimum order amount if the contract has dollar stipulations.

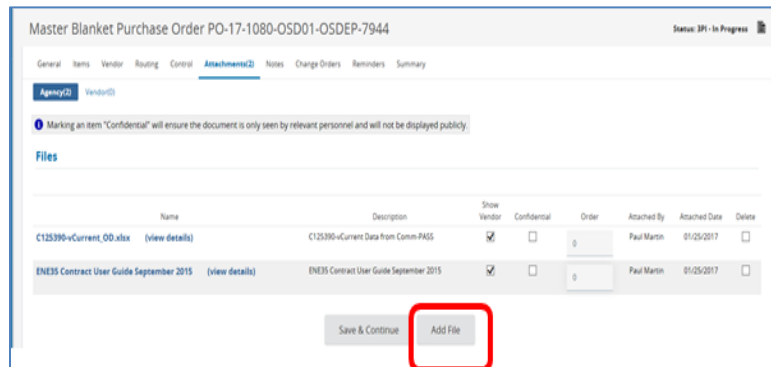
If all organizations in COMMBUYS can purchase from the MBPO, check the **Cooperative Purchasing Allowed** box and in the organization field search for / select ALL ORGs – only with OSD's authorization.

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

Job Aid:

How to set up a Master Blanket Purchase Order (MBPO) using a Migrated Comm-PASS Contract

Screenshot



Master Blanket Purchase Order PO-17-1080-OSD01-OSDEP-7944

Status: BFI - In Progress

General Items Vendor Routing Control **Attachments(2)** Notes Change Orders Reminders Summary

Agency(2) Vendor(2)

Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Files

Name	Description	Show Vendor	Confidential	Order	Attached By	Attached Date	Delete
C125390-vCurrent_OD.xlsx (view details)	C125390-vCurrent Data from Comm-PASS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	Paul Martin	01/25/2017	<input type="checkbox"/>
ENE35 Contract User Guide September 2015 (view details)	ENE35 Contract User Guide September 2015	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	Paul Martin	01/25/2017	<input type="checkbox"/>

Save & Continue Add File

Directions


Step 29: Editing the Attachments Tab

Click on the **Attachments** tab. The **Attachments** tab displays.

If any files auto-attach: review, keep or delete as necessary.

Attachments include bid attachments and required forms/contract documents.

Click on the **Add File** button to add a new 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 special characters up to a maximum length of 200.

Name*

Description

File*

Browse

Search File

Location: 1080

Save & Exit Save & Continue Reset Cancel & Exit

Step 30: Searching for Files

1. The **Add File** window opens. To select a file from your desktop, click the **Browse** button. This will search for documents from your computer. Select the desired file.

NOTE: Button names may vary from browser to browser. For example, the **Browse** button in Internet Explorer is called **Choose File** in Chrome.

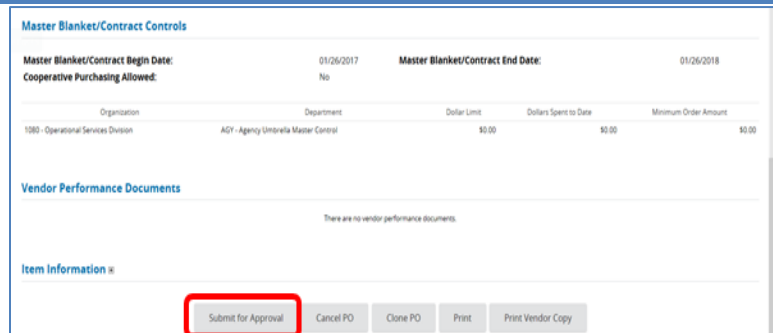
2. Complete the following fields
 - **Name** – required; but will be populated with the selected file name if left blank
 - **Description** – optional
3. Click on the **Save & Continue** button to add another file or click on the **Save & Exit** button when all files have been added.

NOTE: Files previously uploaded or added to the Document Library in COMMBUYS are available in the Attachment Repository. To locate and attach from the Repository, click the **Search File** button and complete the advanced search criteria.

Job Aid:

How to set up a Master Blanket Purchase Order (MBPO) using a Migrated Comm-PASS Contract

Screenshot



Master Blanket/Contract Controls

Master Blanket/Contract Begin Date: 01/26/2017
Cooperative Purchasing Allowed: No

Master Blanket/Contract End Date: 01/26/2018

Organization	Department	Dollar Limit	Dollars Spent to Date	Minimum Order Amount
1080 - Operational Services Division	AGI - Agency Umbrella Master Control	\$0.00	\$0.00	\$0.00

Vendor Performance Documents

There are no vendor performance documents.

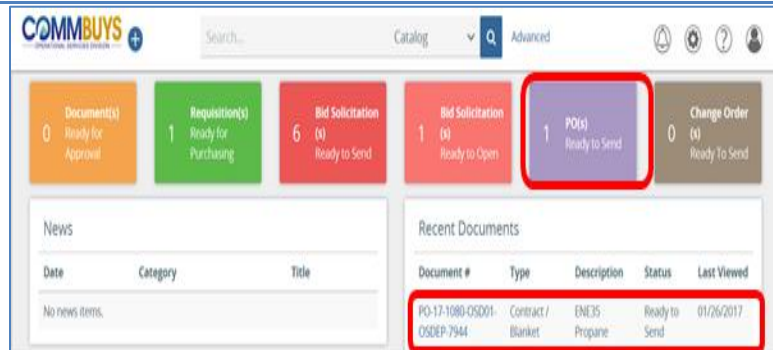
Item Information »

Submit for Approval Cancel PO Clone PO Print Print Vendor Copy

Directions

Step 31: Submitting for Approval

1. Click on the **Summary** tab.
2. Review the PO content.
3. Scroll to the bottom of the page and click on the **Submit for Approval** button. The Blanket PO will be routed through any approvals required and may be returned to you to re-open, edit, and resubmit if approvers have disapproved with comments about changes needed.



COMMbuys Operational Services Division

Search... Catalog Advanced

Documents(s) Ready for Approval 1 Requisition(s) Ready for Purchasing 6 Bid Solicitation (s) Ready to Send 1 Bid Solicitation (s) Ready to Open 1 PO(s) Ready to Send 0 Change Order (s) Ready To Send

News

Date	Category	Title
No news items.		

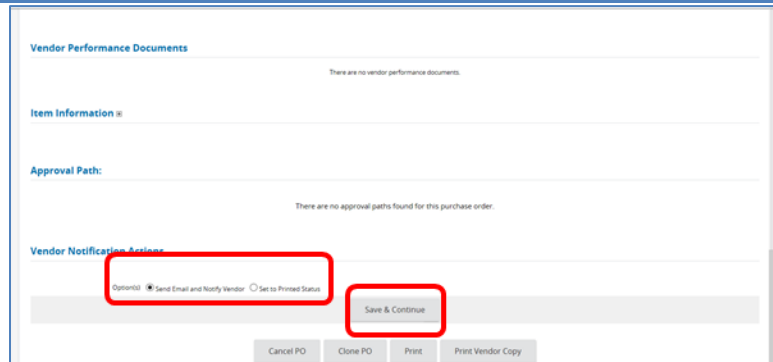
Recent Documents

Document #	Type	Description	Status	Last Viewed
PO-17-1080-OSD01-OSDEP-7944	Contract / Blanket	ENRCS Propane	Ready to Send	01/26/2017

Step 32: Opening the PO

Once approvals have been granted, open the MBPO. One way to find the document is to search the **PO(s) Ready to Send** box. Another way is to look at the **Recent Documents** box.

Either way, click on the blue hyperlinked **Document# (PO#)** to open the MBPO.



Vendor Performance Documents

There are no vendor performance documents.

Item Information »

Approval Path:

There are no approval paths found for this purchase order.

Vendor Notification Actions

Optional: ☒ Send Email and Notify Vendor ☐ Set to Printed Status

Save & Continue

Cancel PO Clone PO Print Print Vendor Copy

Step 33: Saving the PO

1. At the bottom of the **Summary** page, select one of the following options:
 - **Send Email and Notify Vendor**
 - **Set to Printed Status.**

Set to Printed Status does not notify the Vendor. For a contract already sent in Comm-PASS, you might want to use this option. Use Send Email and Notify vendor if this is a new contract and the vendor requires notification.

Click on the **Save & Continue** button to put the Blanket PO into Sent status.