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.
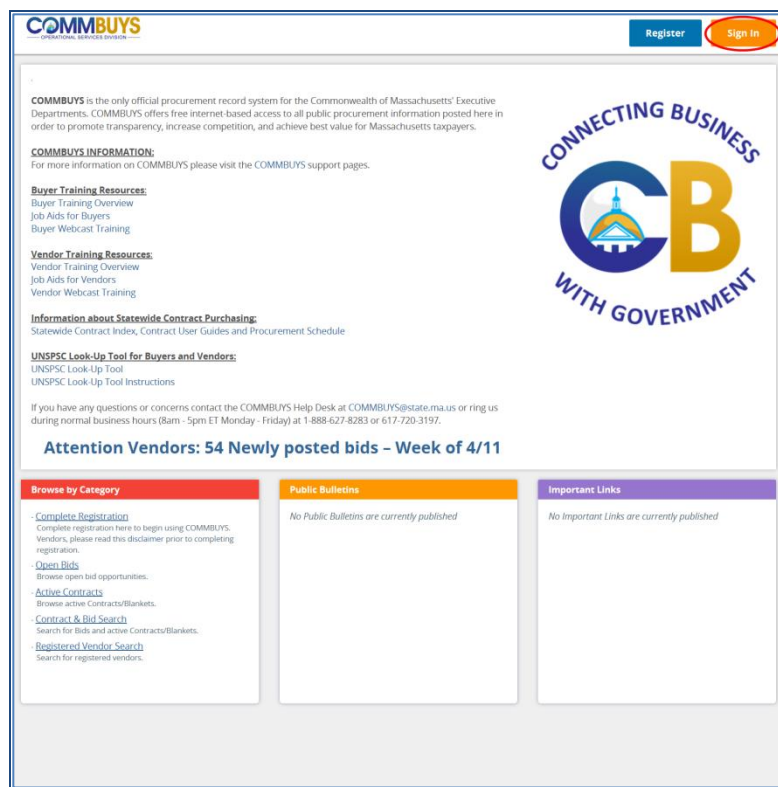
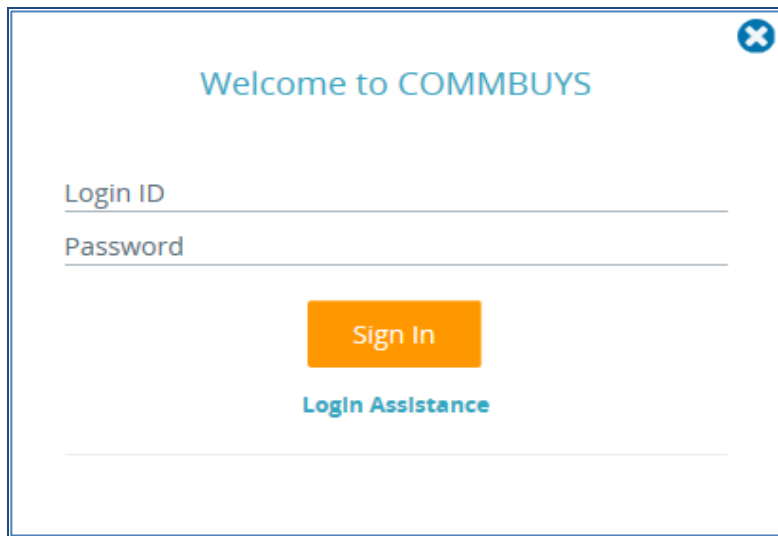| Screenshot	Directions
	Step 1: Accessing the COMMBUYS Landing Page 1. Launch the COMMBUYS website by entering the URL (https://www.commbuys.com) in the browser or by clicking on the hyperlink COMMBUYS. 2. Click on the orange **Sign In** button in the upper right hand corner.

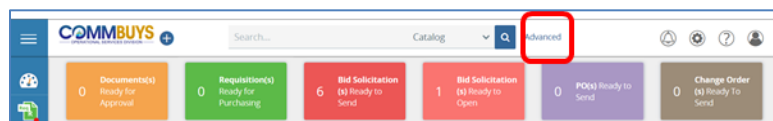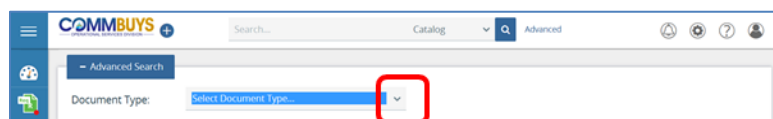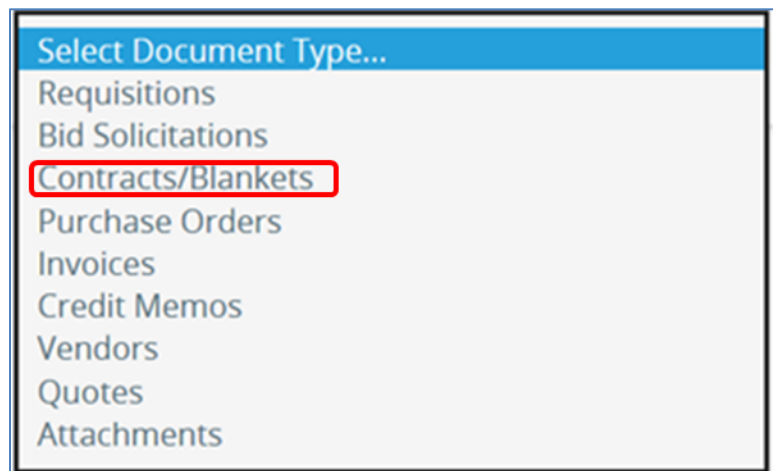| Screenshot	Directions
	Step 2: Signing in to COMMBUYS 1. Enter your Login ID and Password and click on the **Sign In** button.
	Step 3: Conducting an Advanced Search To Search for migrated Blankets, click on the **Advanced** hyperlink next to the magnifying glass icon.
	Step 4: Searching for Documents 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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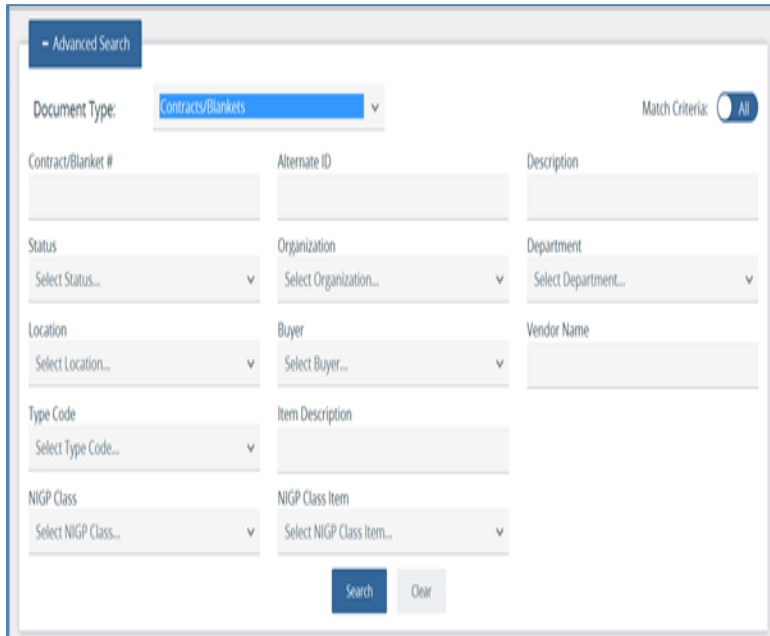| Screenshot	Directions
	Step 6: Searching for a Contract/Blanket 1. Use any of the search criteria fields to search for the contract you are looking for: • **Contract/Blanket #** is the Comm-PASS contract number. C###-vCurrent • **Description –** may contain the SWC number • **Vendor Name -** Conversion 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.

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Screenshot	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

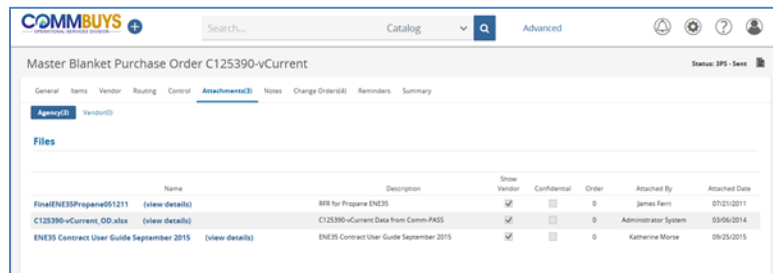| Screenshot	Directions

	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
	  o **Organization**
	  o **Department**
	  o **Location**
	  o **Contact Instructions**
	  o **Status**
	  o **Type Code**
	    ▪ Statewide
	    ▪ Non-Statewide
	  o **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

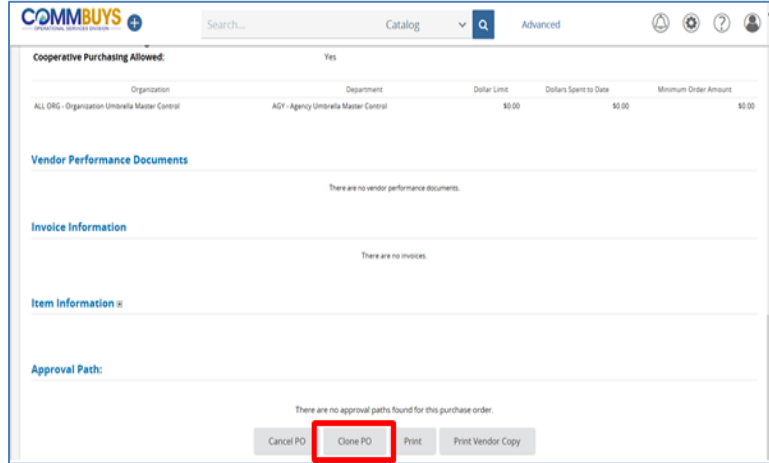| Screenshot	Directions
	Step 9: Reviewing the Attachments Tab The **Attachments** tab is where you will find all key contract information. In this example, we see the RFR and contract amendments. All attachments will need to be uploaded to the new Purchase Order. The orphan data file is the only attachment 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.

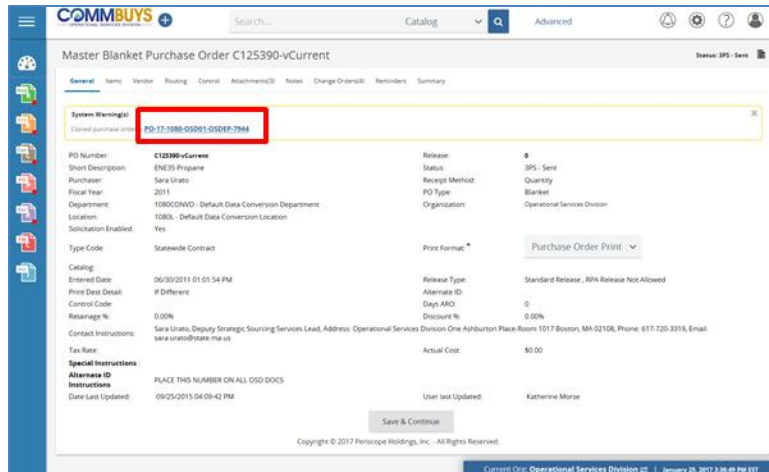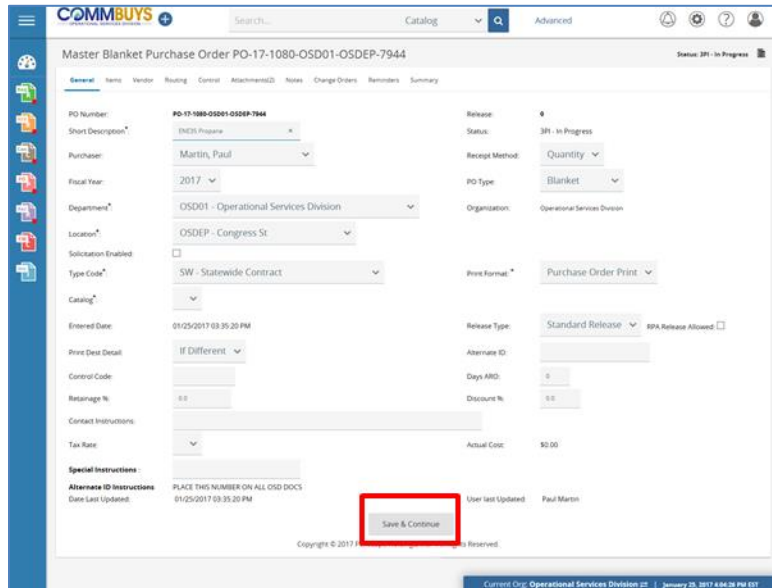| Screenshot	Directions
	Step 11: Cloning the PO Return to the **Summary** tab and scroll down to the bottom of the page. Click on the **Clone PO** button. Clone the purchase order *once for each* Vendor in a Line Item catalog. Clone the PO only *once for all* vendors in a Distributor catalog.
	Step 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.

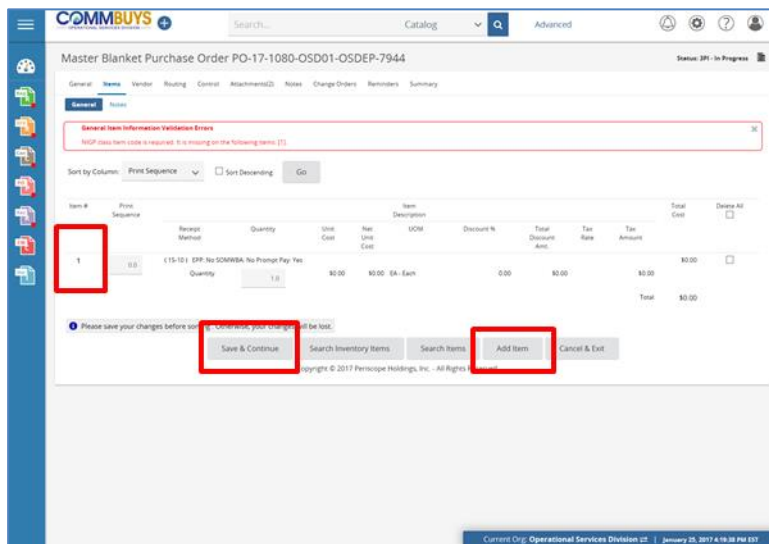| Screenshot	Directions

	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.

Screenshot	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.

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.
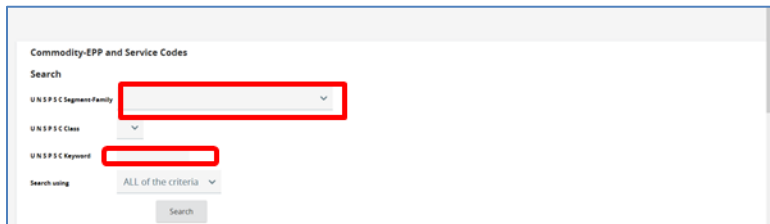
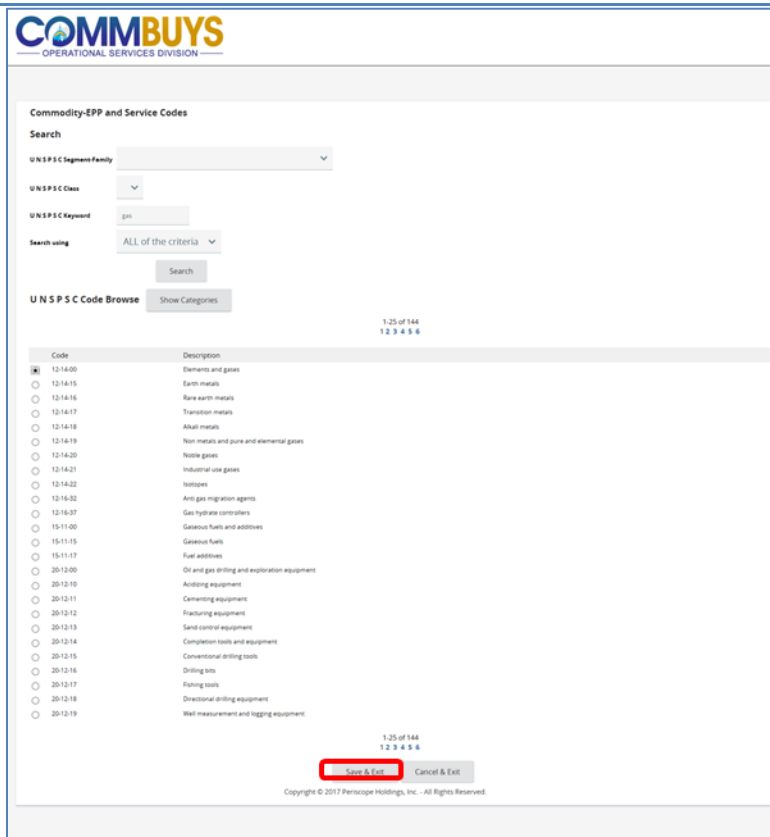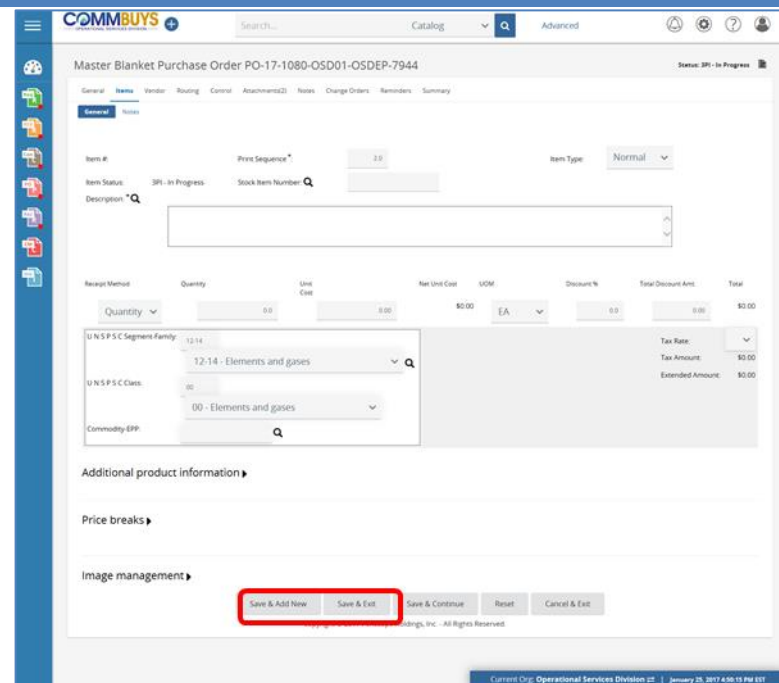| Screenshot	Directions
	Step 16: Searching for the UNSPSC Use the pop-up window to search for a UNSPSC. 1. Enter a keyword or select a UNSPSC Segment/Family 2. Click on the **Search** button.
	Step 17: Selecting the Commodity Code 1. Select the **radio button** next to the appropriate code. 2. Click on the **Save & Exit** button.

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 **Lookup & Change Vendor** button.

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	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.
	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.

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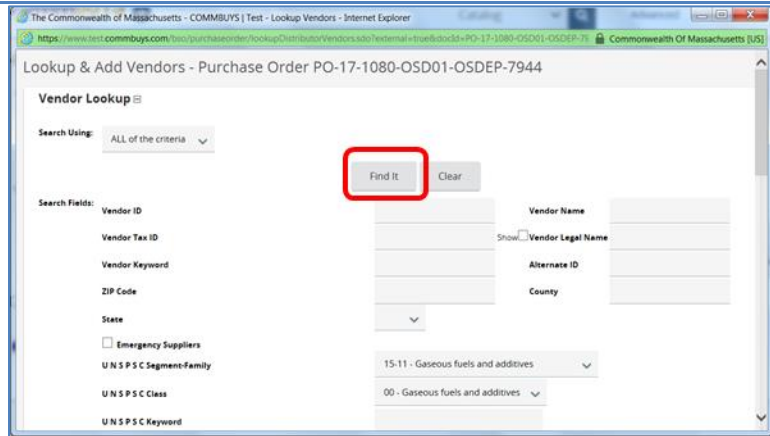| Screenshot	Directions
	Step 24: Looking Up Distributors Click on the **Lookup & Add Vendor Distributors** button.
	Step 25: Finding Distributors A Vendor Search pop up window displays. Search for the Vendors on the contract, the search will only return registered COMMBUYS vendors. Click on the **Find It** button.
	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.

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.

Screenshot	Directions
Master Blanket Purchase Order PO-17-1080-OSD01-OSDEP-7944 — Status: 3PI - In Progress. General Items Vendor Routing Control **Attachments(2)** Notes Change Orders Reminders Summary. Agency(2) Vendor(0). Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly. **Files**. Table columns: Name, Description, Show Vendor, Confidential, Order, Attached By, Attached Date, Delete. C125390-vCurrent_OD.xlsx (view details) — C125390-vCurrent Data from Comm-PASS — ☑ — ☐ — 0 — Paul Martin — 01/25/2017 — ☐. ENE35 Contract User Guide September 2015 (view details) — ENE35 Contract User Guide September 2015 — ☑ — ☐ — 0 — Paul Martin — 01/25/2017 — ☐. [Buttons: Save & Continue, **Add File**]	**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. [Buttons: **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.

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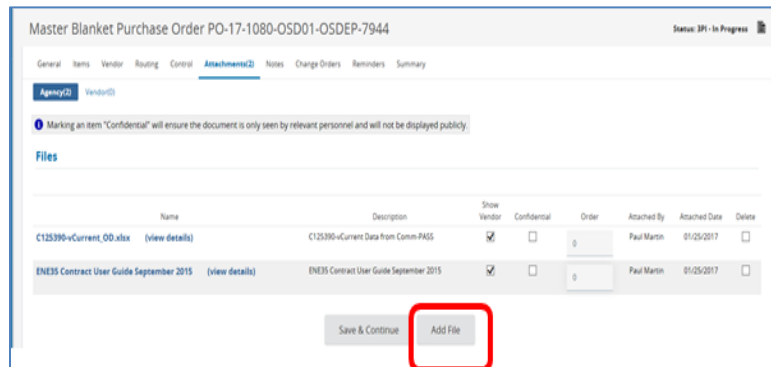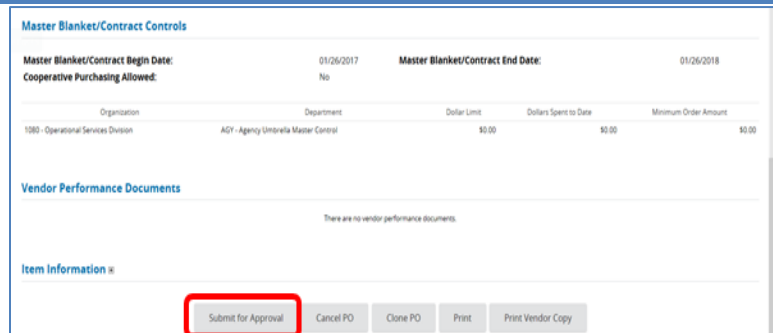| Screenshot	Directions
	Step 31: Submitting for Approval 1. Click on the **Summary** tab. 2. Review the PO content. 3. Scroll to the bottom of the page and click on the **Submit for Approval** button. The Blanket PO will be routed through any approvals required and may be returned to you to re-open, edit, and resubmit if approvers have disapproved with comments about changes needed.
	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.
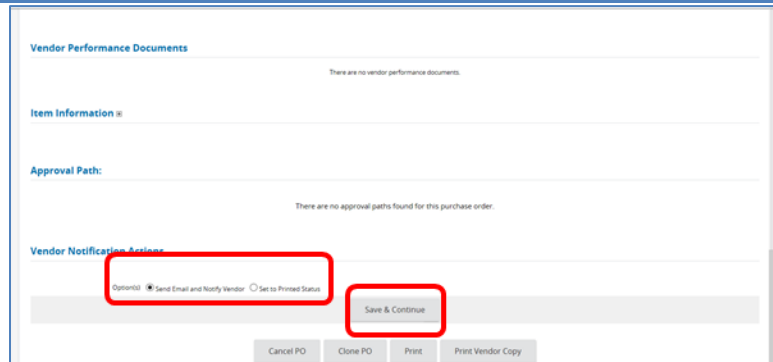
	Step 33: Saving the PO
	
	1. At the bottom of the **Summary** page, select one of the following options:
	
	    • **Send Email and Notify Vendor**
	    • **Set to Printed Status**.
	
	Set to Printed Status does not notify the Vendor. For a contract already sent in Comm-PASS, you might want to use this 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.