

Job Aid:

How to Complete and Submit a Sales Report: Uploading Sales Data Template

This Job Aid shows how to:


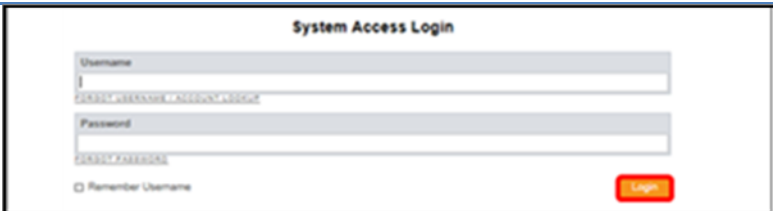
- Access the Sales Reporting module (Step 1)
- Find reports to be submitted (Step 3)
- Download the Sales Data template (Step 5)
- Upload the saved Sales Data template (Step 8)
- Enter your Supplier Diversity Plan (SDP) spending (Step 15)
- Submit and sign your report for review (Step 22)

Refer to the associated Quick Reference Guides or supports:

- 1) Submitting a Zero Sales/Zero SDP Report:Quick Reference Guide (QRG) Adding Zero Sales
- 2) Manually enter Sales Data:QRG How to Manually Add Sales Report Data
- 3) Visit our Vendor Report Management FAQs by visiting the webpage: [Vendor Report Management \(VRM\) FAQs](#) or by entering the URL (<https://www.mass.gov/service-details/general-vendor-report-management-frm-faqs>) in the browser.
- 4) Resolving report errors:Contact your Contract Manager or email the COMMBUYS Help Desk COMMBUYS@mass.gov (COMMBUYS@mass.gov) or call 888-MA-State (627-8283).

Note: Do not modify the Sales Data template: changes to the template, file format, or invalid data entries will result in import errors.

For **Technical Customer Support**, go to the [Vendor Report Management system](#), click **Contact Support**, and select the support type from the list.

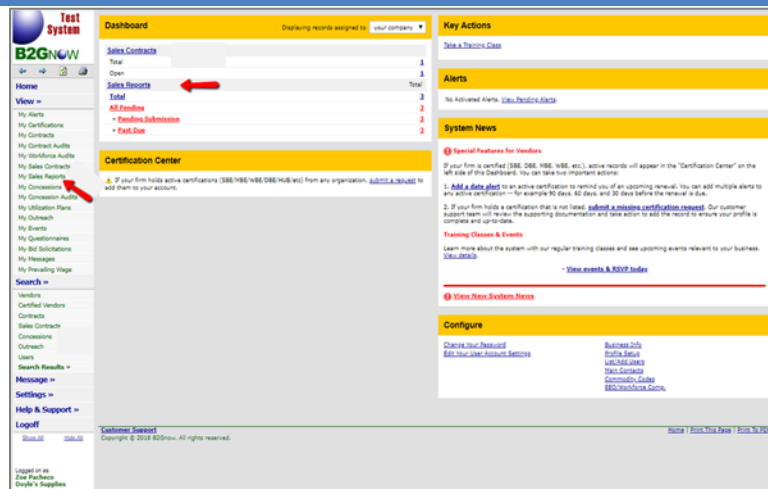
Screenshot	Directions
	<p>Step 1: Log into the Vendor Report Management (VRM) System</p> <ol style="list-style-type: none"> 1. Launch the Vendor Report Management system by entering the URL (https://massosd.gob2g.com/) in the browser. 2. Click Log In in the middle of the VRM landing page.
	<p>Step 2: Log into the VRM System</p> <p>Enter the Username and Password and click Login.</p>

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Screenshot

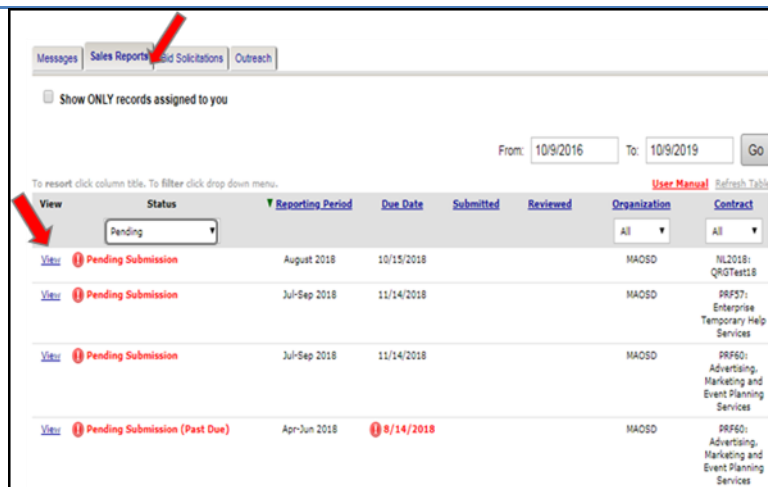
Directions



Step 3: Access the Sales Report tab

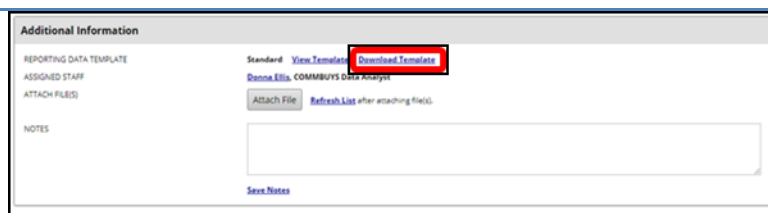
Use either of two options on the home page to access the Sales Report:

- In the Dashboard section, click the **Sales Report** hyperlink OR
- Under the **View** navigation menu, click **My Sales Reports**.



Step 4: Find Pending Submission Reports

- On the **Sales Report** tab, filter the reports by status.
- Any report with a **"Pending"** status requires attention.
- Click **View** to access the corresponding report.



Step 5: Download the Data Template

If you already have the Data Template, skip to **Step 8**.

On the **This Sales Report** tab, select the Download Template link in the **Additional Information** section.

Step 6: Select the Excel File Format

- Download to XLSX
- Download to XLS

Note: The template has been downloaded to your computer. Data entry should be done outside the web browser.

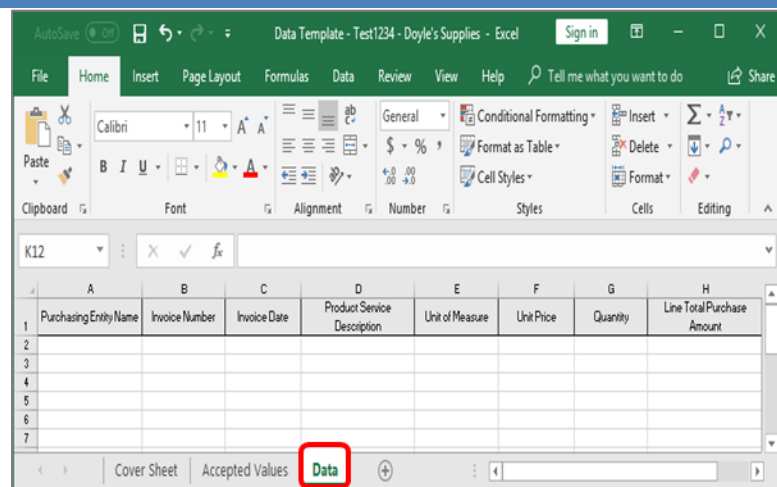


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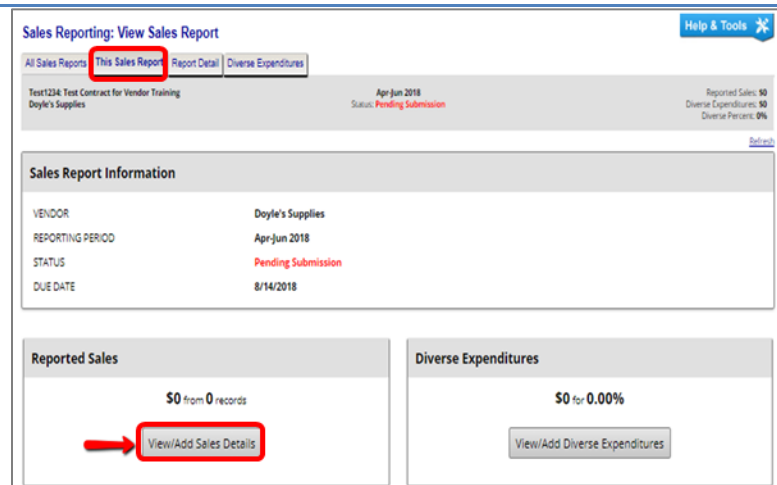


Step 7: Enter Sales Report Details

1. Enter the sales information for the reporting quarter in the Data worksheet.
2. Save the completed Data Template. The saved template will be uploaded during the Upload Sales Data step.

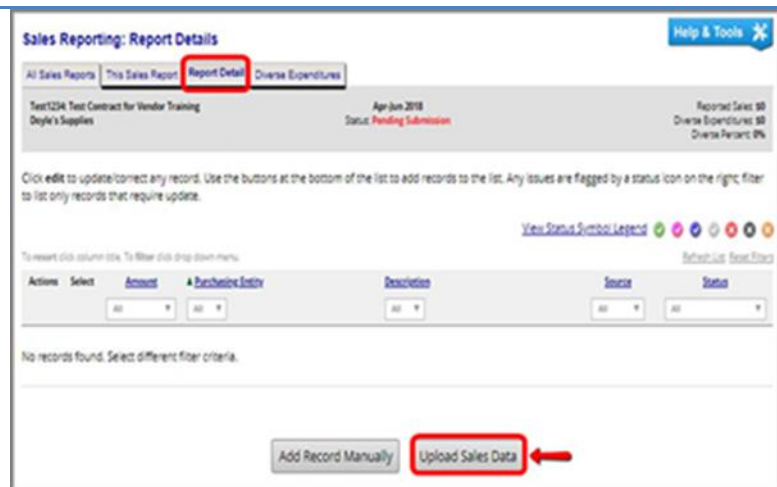
Reminder: Do not modify the column headers or add extra columns.

Instructions on how to input data and save the file are detailed in the **Cover Sheet** tab of the Template Workbook.



Step 8: Access the Sales Details

1. Return to the VRM System in the Web browser.
2. Select the **This Sales Report** Tab.
3. Click **View/Add Sales Details** in the Reported Sales section.



Step 9: Upload Sales Data

The system automatically advances to the **Report Detail** tab.

Click **Upload Sales Data**.

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Screenshot

Directions

Step 1: Upload Data File

Click **Choose File** to choose a file from your computer and click **Upload File** to continue. The file will be uploaded to the system.

SELECT FILE TO UPLOAD *

Choose File

No file chosen

Upload File

View Import Queue

Return to Record List

Step 10: Upload the Completed Sales Report

1. Select **Choose File** and navigate to the saved Data Template containing the sales information.
2. Click **Upload File**.

Note: Internet Explorer Users have a slightly different appearance.

- I. Click **Browse** to locate the file.
- II. Then select **Upload File**.

Internet Explorer Users appearance difference

Step 1: Upload Data File

Click **Browse...** to choose a file from your computer and click **Upload File** to continue. The file will be uploaded to the system.

SELECT FILE TO UPLOAD *

Browse...

Upload File

View Import Queue

Return to Record List

Step 11: Upload Process

Successful Data Template upload involves four (4) phases:

- I. Phase i: **25% - Initial file upload:** The system has received the file.

Click **Validate Template and File Format**.

Sales Reporting: Import Sales Data

File uploaded, pending template and file format validation; click **Validate Template and File Format** to continue.

Sales Report Information

CONTRACT: PRF200 - TestPRF200
VENDOR: Test19
REPORTING PERIOD: July 2018

Progress: **25% complete**

Step 2: Validate Template and File Format

IMPORT STATUS: File uploaded, pending template and file format validation
FILENAME: Data Template - PRF200 - IMMLV.xlsx

Validate Template and File Format

Cancel Import

View Queue

Upload Another File

Close

Customer Support
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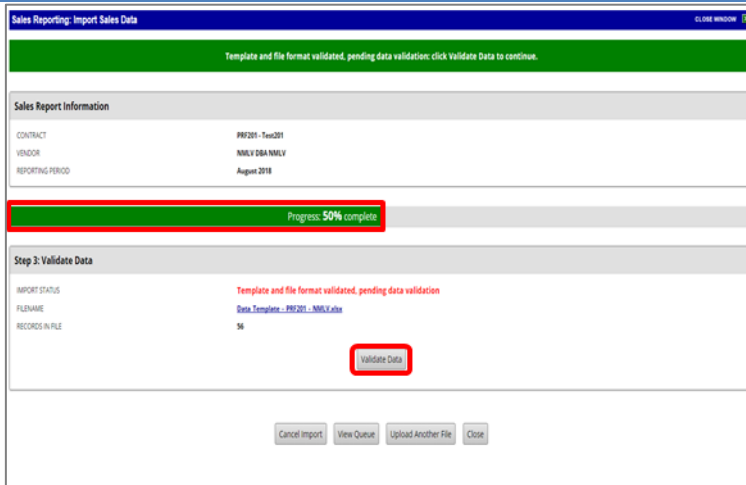
Back This Page | Back To OSD

Job Aid:

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Screenshot

Directions



Sales Reporting: Import Sales Data

Template and file format validated, pending data validation: click Validate Data to continue.

Sales Report Information

CONTRACT	PRF201 - Test201
VENDOR	NMCLY DBA NMCLY
REPORTING PERIOD	August 2018

Progress: **50% complete**

Step 3: Validate Data

IMPORT STATUS: Template and file format validated, pending data validation
 FILENAME: Data Template - PRF201 - NMCLY.xlsx
 RECORDS IN FILE: 56

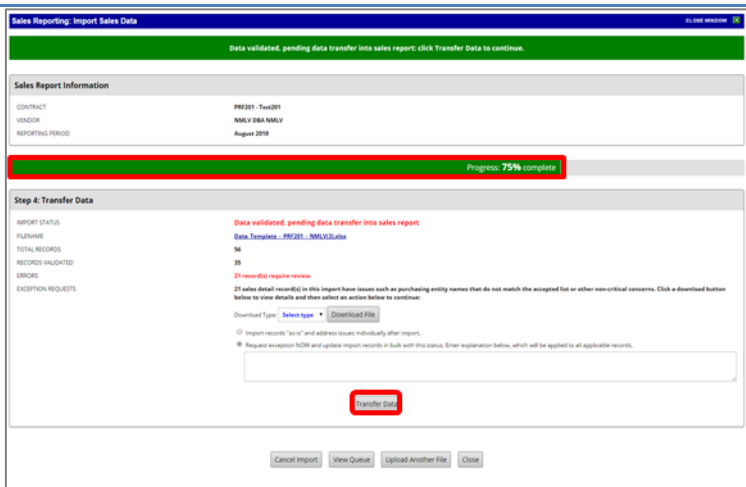
Validate Data

Cancel Import View Queue Upload Another File Close

Step 12: Upload Process

- II. Phase ii: **50% - Template and file format validation**: The system has validated the file format and column names.

Click **Validate Data**.



Sales Reporting: Import Sales Data

Data validated, pending data transfer into sales report: click Transfer Data to continue.

Sales Report Information

CONTRACT	PRF201 - Test201
VENDOR	NMCLY DBA NMCLY
REPORTING PERIOD	August 2018

Progress: **75% complete**

Step 4: Transfer Data

IMPORT STATUS: Data validated, pending data transfer into sales report
 FILENAME: Data Template - PRF201 - NMCLY.xlsx
 TOTAL RECORDS: 56
 RECORDS UNLOADED: 0
 ERRORS: 0
 EXCEPTION REQUESTS: 0

Transfer Data

Cancel Import View Queue Upload Another File Close

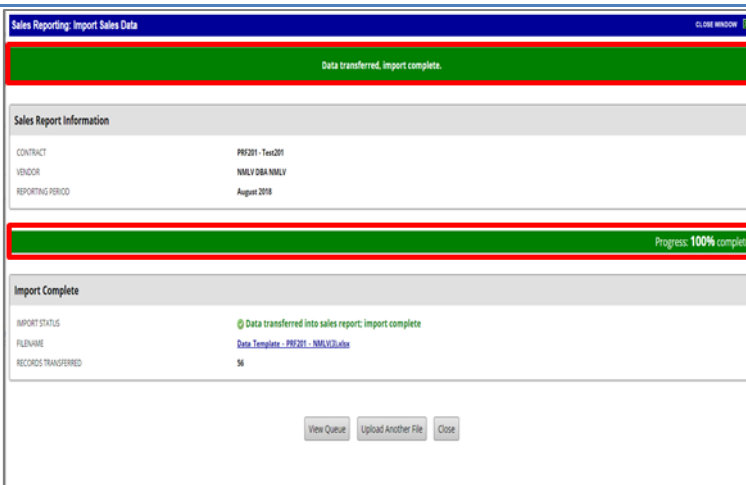
Step 13: Upload Process

- III. Phase iii: **75% - Data Validated**

The system indicates the number of records identified for uploaded.

For instructions on how to address errors, alerts, and records requiring review, please contact the COMMBUYS Help Desk.

Click **Transfer Data**.



Sales Reporting: Import Sales Data

Data transferred, import complete.

Sales Report Information

CONTRACT	PRF201 - Test201
VENDOR	NMCLY DBA NMCLY
REPORTING PERIOD	August 2018

Progress: **100% complete**

Import Complete

IMPORT STATUS: Data transferred into sales report; import complete
 FILENAME: Data Template - PRF201 - NMCLY.xlsx
 RECORDS TRANSFERRED: 56

View Queue Upload Another File Close

Step 14: Upload Process

- IV. Phase iv: **100% - Upload Complete**

The file upload was successfully completed.

Click **Done**.

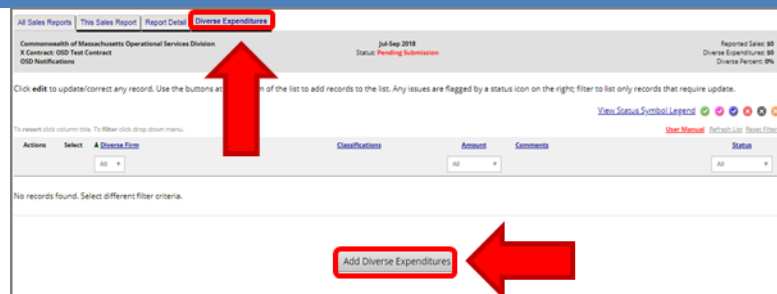
The screen will refresh to display the **Sales Details** tab and the uploaded records.

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Screenshot

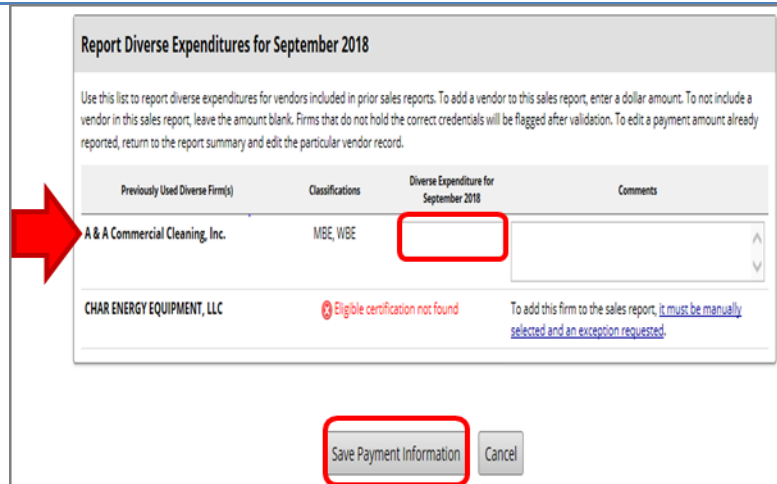
Directions



Step 15: Provide Supplier Diversity Plan spending – (Diverse Expenditure)

If you do not have SDP spend, skip to **Step 22**.

1. Select the **Diverse Expenditure** tab
2. Click **Add Diverse Expenditure**.



Step 16: Enter Supplier Diversity Plan (SDP) spending

If you have reported spending with an SDP partner in the past, provide the spending information here.

1. Enter the Diverse Expenditure for the reporting period
2. Click **Save Payment Information**.

If you have reported all your spending skip to **Step 22**.

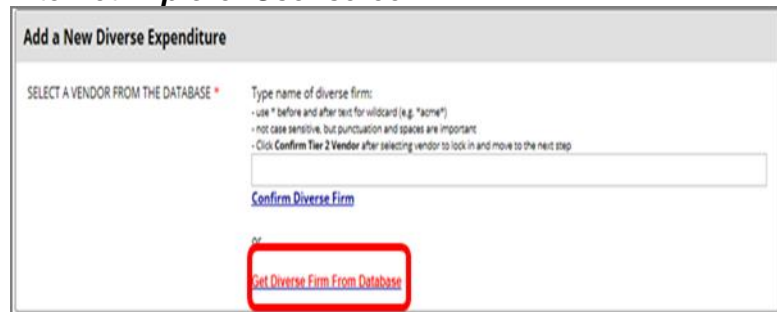


Step 17: Finding Supplier Diversity Plan (SDP) Partners

If you have not previously reported SDP spending with a particular SDP partner, you must find that partner in the database.

Click **Get Diverse Firm From Database**.

Internet Explorer User screen



Note: Internet Explorer users have a slightly different screen.

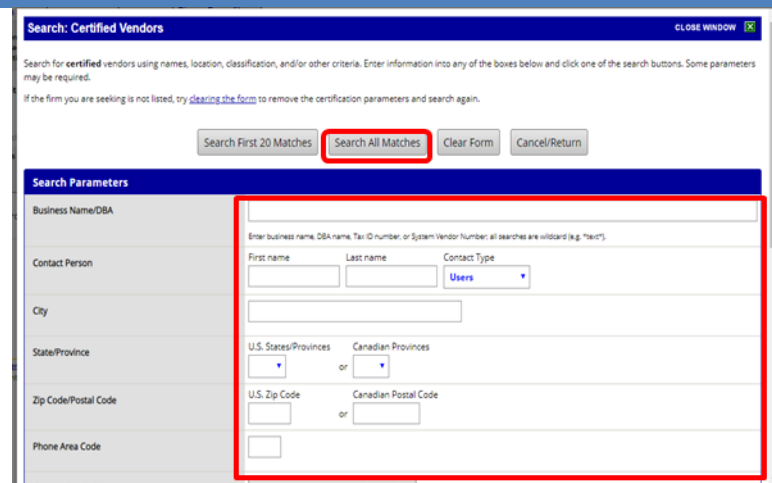
Click **Get Diverse Firm From Database**.

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Step 18: Finding Supplier Diversity Plan (SDP) Partners

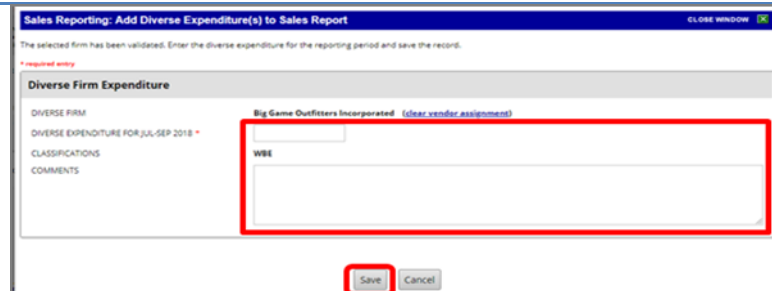
1. Enter search criteria to find your SDP partner.
2. Click **Search All Matches**.

If you do not find your SDP partner in the database, contact your Contract Manager.

Business Name	Phone Number	Location	Agency	Type	Status	Actions
BIERMANN SERVICES, INC.	413-592-7725	CHICOPSE, MA	Mass	WBE	Active	Select Vendor
BIG GAME OUTFITTERS, INC.	978-469-9750	HAMILTON, MA	Mass	WBE	Active	Select Vendor
BIGELOW NURSERIES, INC.	508-845-2143	NORTHBOROUGH, MA	Mass	WBE	Active	Select Vendor
BILLIONAIRE BABIES, LLC	617-908-9660	WINTHROP, MA	Mass	WBE	Active	Select Vendor
BINERA, INC.	757-897-4832	YORKTOWN, VA	Mass	WBE	Active	Select Vendor
BK TILE & STONE, LLC	413-325-8966	GREENFIELD, MA	Mass	WBE	Active	Select Vendor
BLACK PEARL PRODUCTIONS, INC.	774-264-9793	WESTPORT, MA	Mass	WBE	Active	Select Vendor
BLAKELY CONSULTING, LLC	617-480-8117	DORCHESTER, MA	Mass	WBE	Active	Select Vendor
BLC PAINTING, INC.	978-922-2689	SALEM, MA	Mass	WBE	Active	Select Vendor
BLUE DYNASTY ENTERTAINMENT & TRAVEL, LLC	877-368-8003	MATTAPAN, MA	Mass	WBE	Active	Select Vendor

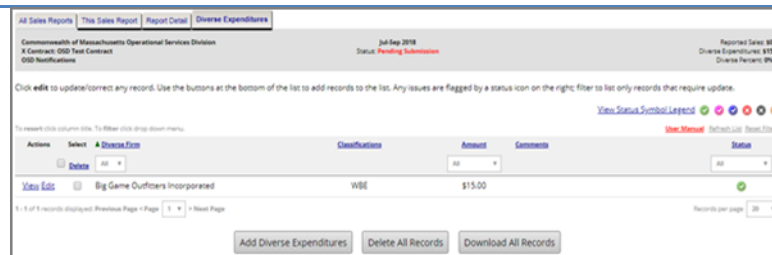
Step 19: Find and Select SDP Partners

1. Locate your SDP partner in the search results.
2. Click **Select Vendor**



Step 20: Enter SDP Spending

1. Enter the diverse expenditure for the reporting period for the SDP partner along with any relevant comments.
2. Click **Save**.



Actions	Select	Diverse Firm	Classifications	Amount	Comments	Status
View	Edit	Big Game Outfitters Incorporated	WBE	\$15.00		Active

Step 21: Additional SDP Partner Spending

Repeat Steps 15 – 20 to report additional SDP partner expenditures.

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Screenshot

Directions

Sales Reporting: View Sales Report [Help & Tools](#)

[All Sales Reports](#) **[This Sales Report](#)** [Report Detail](#) [Diverse Expenditures](#)

Test1234: Test Contract for Vendor Training
Doyle's Supplies Apr-Jun 2018
Status: Pending Submission

Reported Sales: \$50
Diverse Expenditures: \$0
Diverse Percent: 0.00%

Sales Report Information

VENDOR	Doyle's Supplies
REPORTING PERIOD	Apr-Jun 2018
STATUS	Pending Submission
DUE DATE	8/14/2018

Reported Sales

\$50 from 1 records

[View/Add Sales Details](#)

Diverse Expenditures

\$0 for 0.00%

[View/Add Diverse Expenditures](#)

This report has not yet been submitted. When all records have been added for the reporting period, you can submit this report by clicking **Submit Report**.

[Submit Report](#)

Step 22: Submit the Sales Report

1. Select the **This Sales Report** tab.
2. Click **Submit Report**.

[CLOSE](#)

Sign & Submit This Sales Report

Enter your name and information below to sign this sales report. Review any acknowledgement(s) required, check the box(es), and click **Submit Sales Report** to complete the process.

Type your full, legal name*

Zoe Pacheco

Type your title*

Office Manager

Type the legal name of your organization*

Doyle's Supplies

Enter today's date*

8/18/2018 (mm/dd/yyyy)

☒ By checking this box, I attest that the information in this sales report is accurate to my knowledge.

☒ By checking this box, I confirm that there are no diverse expenditures to submit for this reporting period.

[Submit Sales Report](#)

Step 23: Sign and Submit the Sales Report

A digital signature is required to confirm the report submission.

1. A dialogue box appears and the following information must be provided:
 - a. Legal name of individual completing the report
 - b. Job title
 - c. Legal name of the business organization
 - d. Today's date
2. Select the appropriate checkbox(es).
3. Click **Submit Sales Report**.
4. Select **OK** in the pop-up box.

Sales report submitted.

[Refresh](#)

Sales Report Information

VENDOR	Doyle's Supplies
REPORTING PERIOD	Apr-Jun 2018
STATUS	Submitted, Pending Review
SUBMITTED	Zoe Pacheco on 8/18/2018 (View Signature)

Reported Sales

\$50 from 1 records

[View Sales Details](#)

Diverse Expenditures

\$0 for 0.00%

[View Diverse Expenditures](#)

This report has been submitted but not yet reviewed. If changes are necessary, you can withdraw the report, edit, and resubmit. However, once the report is accepted, no updates are permitted.

[Withdraw Report](#)

Step 24: Sales Report Submitted

A message displays confirming the sales report was submitted. The report has been forwarded to the OSD Contract Manager for review.

You have the option to withdraw, edit, and resubmit the report if changes are necessary.

However, once the report is accepted by OSD, changes are no longer possible. Contact your Contract Manager to discuss.

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Vendors may save sales data in a source file and copy the data into the Data Template of the Sales Report template. Be aware of the following:

- Review the Cover sheet of the report template for instructions on how to enter the data and the acceptable values to be used.
- Ensure data is entered in the correct column.
- Do not modify the column headers.
- Do not add extra columns.
- Save the completed report on your computer's desktop, a flash drive, or system network for easy retrieval.

If you have sales data questions, contact your Contract Manager.

Handling Errors

The system will identify if there are errors and will specify the type of error. The sales report cannot be submitted until errors are corrected. View the Error File and use it as a guide to correcting your data.

Here is a list of possible errors:

- Missing invoice number
- Incorrect date format, (date format: MM/DD/YYYY)
- Missing product or service name
- Missing Unit of Measure
- Missing Unit Price and Quantity
- Incorrect total sales cost
- Incorrect value for a particular field
- Purchasing Entity name is not recognized.

Save and Resubmit

After all errors are corrected, save and resubmit the report. Since the report already has sales information, the following may appear: Append or Clear.

- To keep both sets of records, select **Append**.
- To remove the existing record(s) and only save the most recent upload, select **Clear**.