OPERATIONAL SERVICES DIVISION

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)

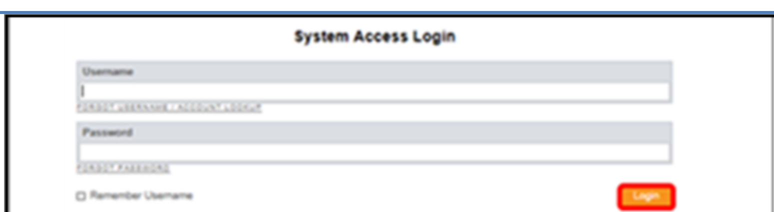
Refer to the associated Quick Reference Guides or supports:

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 Manangement (VRM) FAQs or by entering the URL (https://www.mass.gov/service-details/general-vendor-report-management-vrm-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.

<table>
<tr><th>Screenshot</th><th>Directions</th></tr>
<tr><td>
</td><td>Step 1: Log into the Vendor Report Management (VRM) System

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.</td></tr>
<tr><td>
</td><td>Step 2: Log into the VRM System

Enter the Username and Password and click Login.</td></tr>
</table>

Job Aid:

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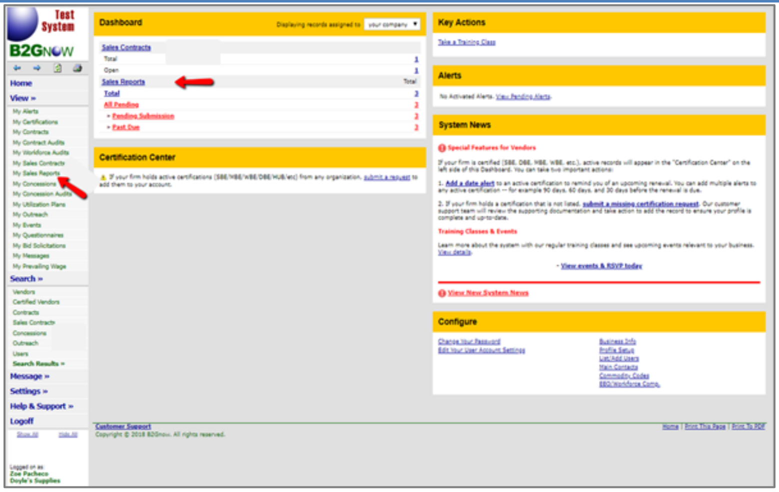
Screenshot	Directions

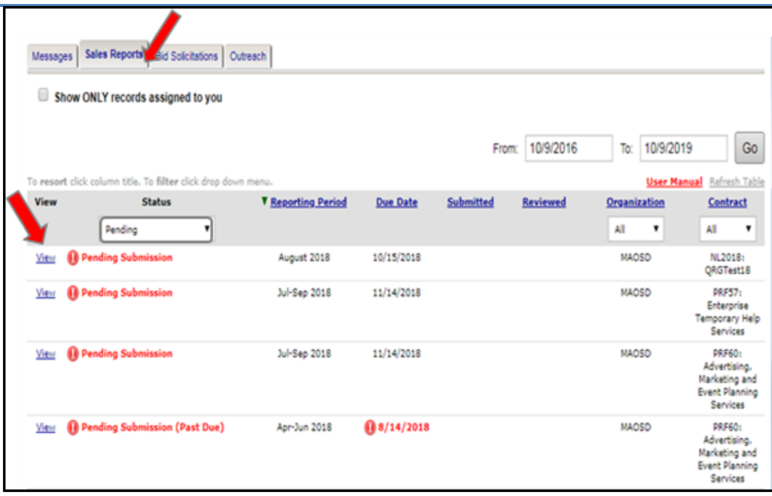


Step 3: *Access the Sales Report tab*

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

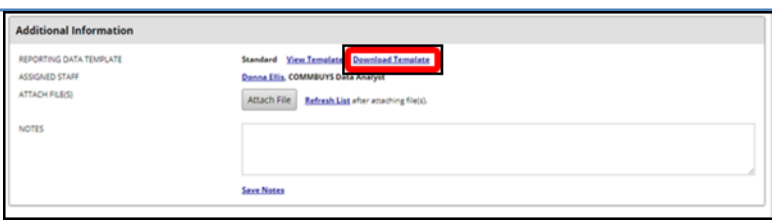
a. In the Dashboard section, click the ***Sales Report*** hyperlink OR

b. Under the **View** navigation menu, click ***My Sales Reports.***



Step 4: *Find Pending Submission Reports*

1. On the ***Sales Report*** tab, filter the reports by status.
2. Any report with a ***"Pending"*** status requires attention.
3. 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*

I. Download to XLSX

II. 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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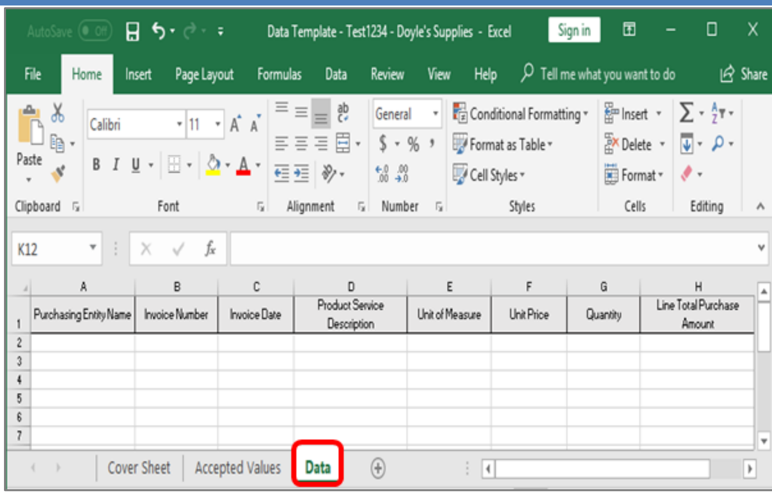
Screenshot	Directions

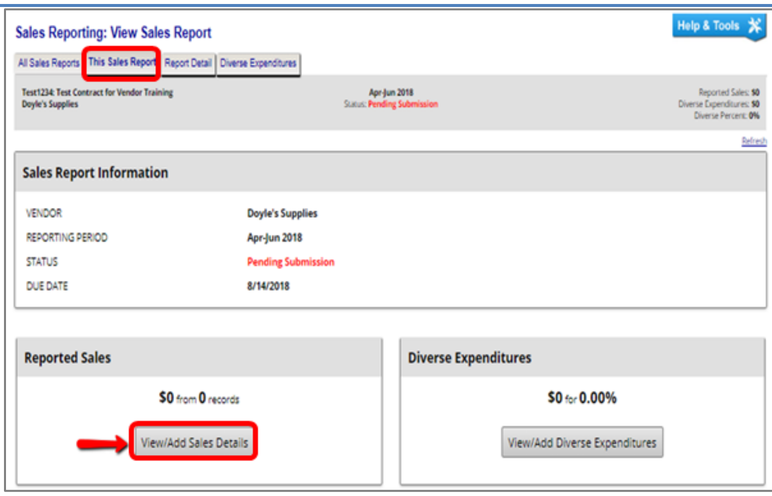


Step 7: Enter Sales Report Details

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.

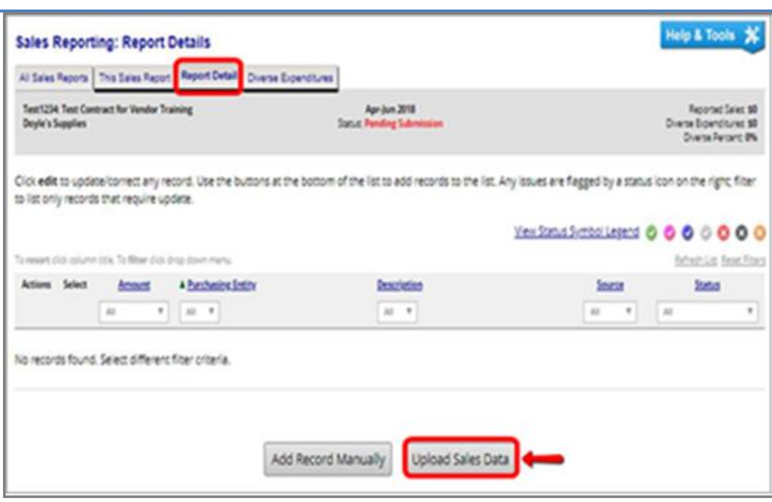
Reminder: Do not modify the column headers or add extra columns.

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***.

Job Aid:

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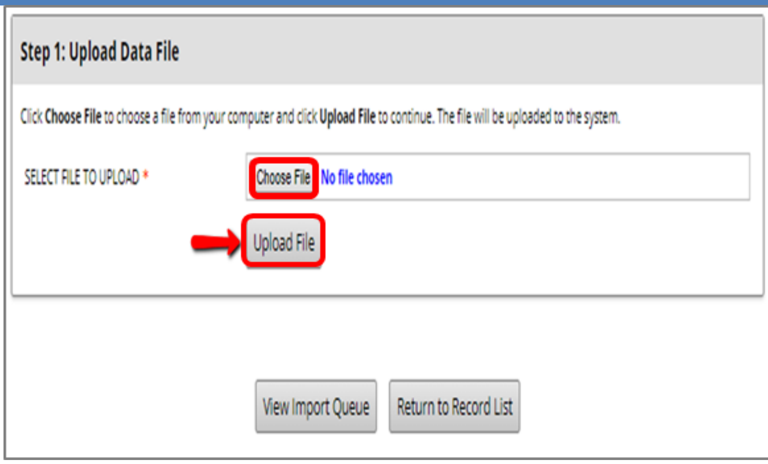
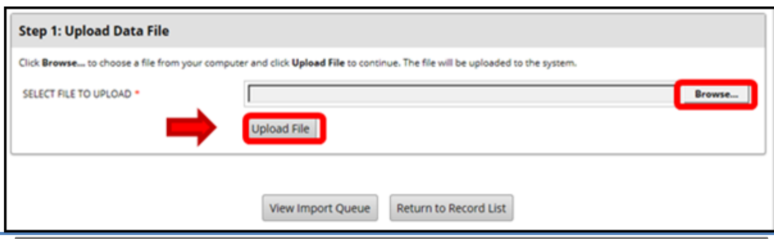
Screenshot	Directions



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***.

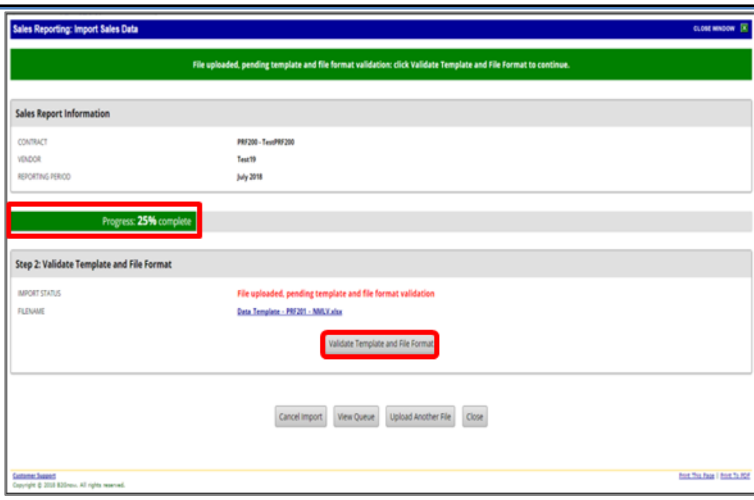
Internet Explorer Users appearance difference



Note: Internet Explorer Users have a slightly different appearance.

I. Click ***Browse*** to locate the file.

II. Then select ***Upload File****.*



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.***

OPERATIONAL SERVICES DIVISION

Job Aid:

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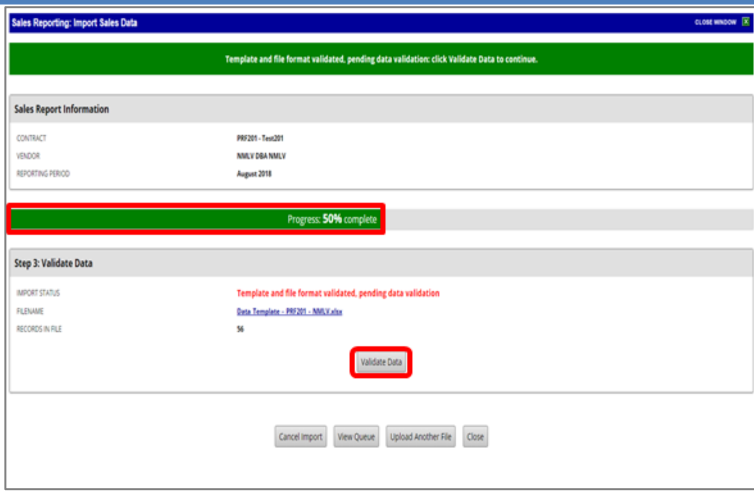


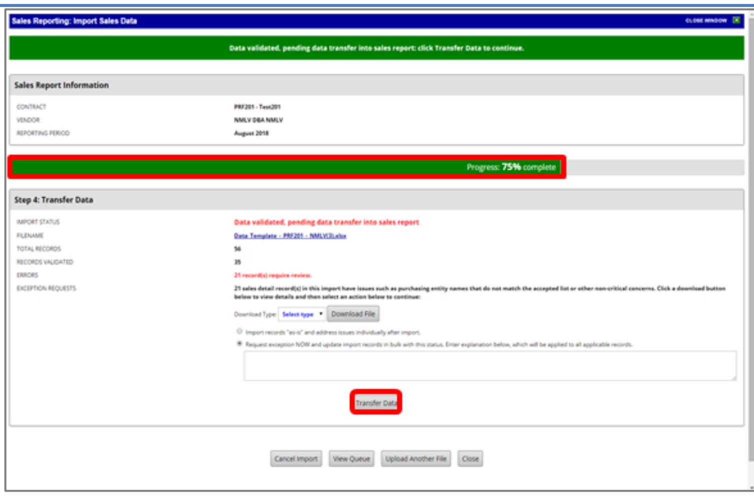
</td><td>

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.***

</td></tr>
<tr><td>



</td><td>

Step 13: Upload Process

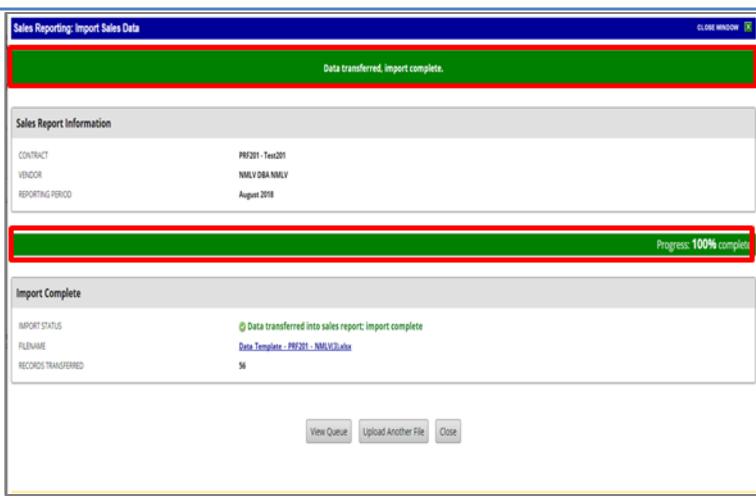
III. Phase iii: **75% - Data Validated**

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.***

</td></tr>
<tr><td>



</td><td>

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.

</td></tr>
</table>

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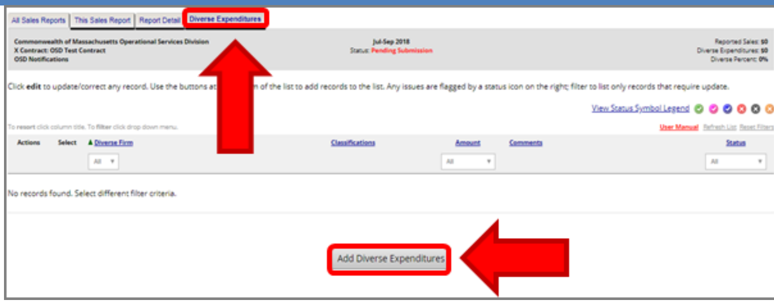
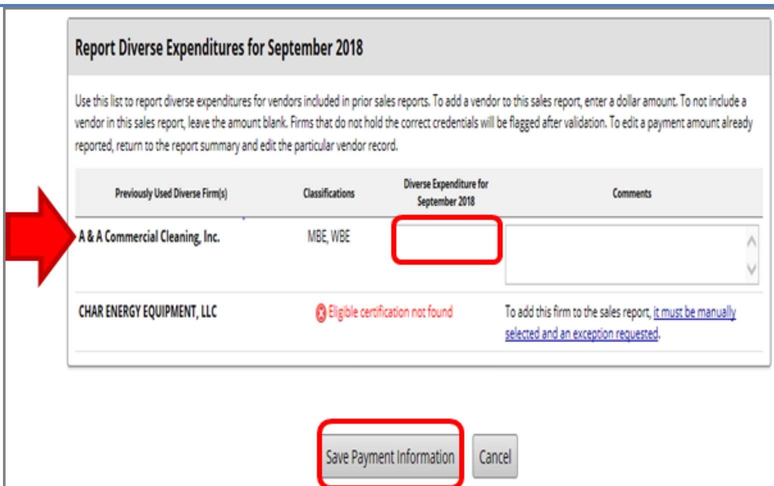
Screenshot	Directions



Step 15: Provide Supplier Diverity 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****.*

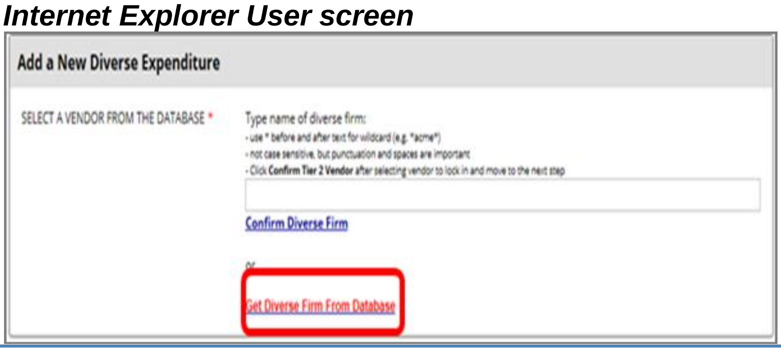
If you have reported all your spending skip to Step 22.

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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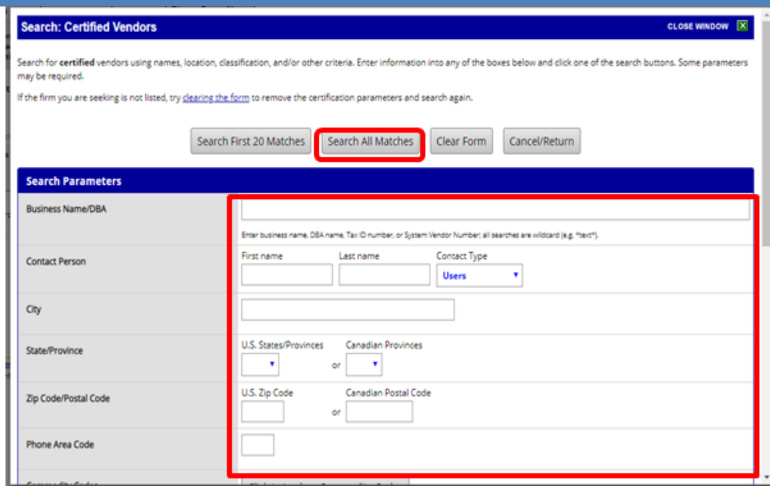
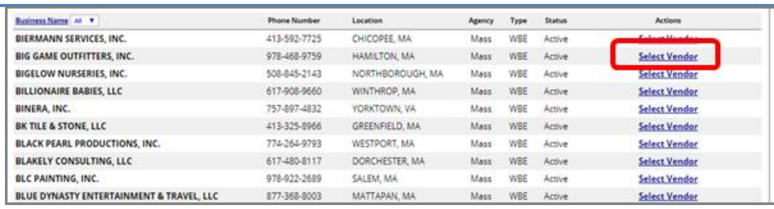
Screenshot	Directions



Step 18: Finding Supplier Diversity Plan (SDP) Partners

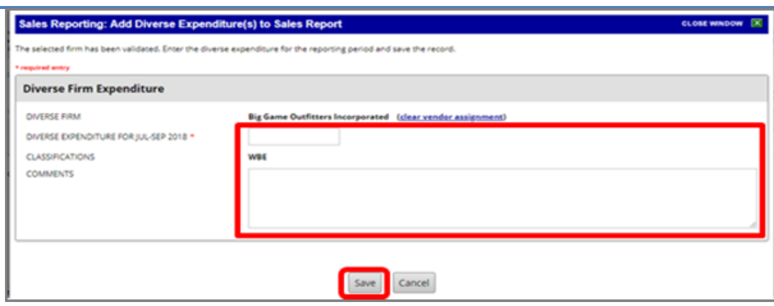
1. Enter search criteria to find your SDP partner.
2. Click ***Search All Matches***.

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



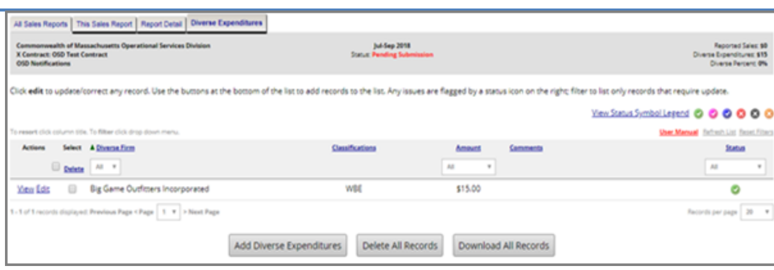
Step 19: Find and Select SDP Partners

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***.



Step 21: Additional SDP Partner Spending

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

OPERATIONAL SERVICES DIVISION

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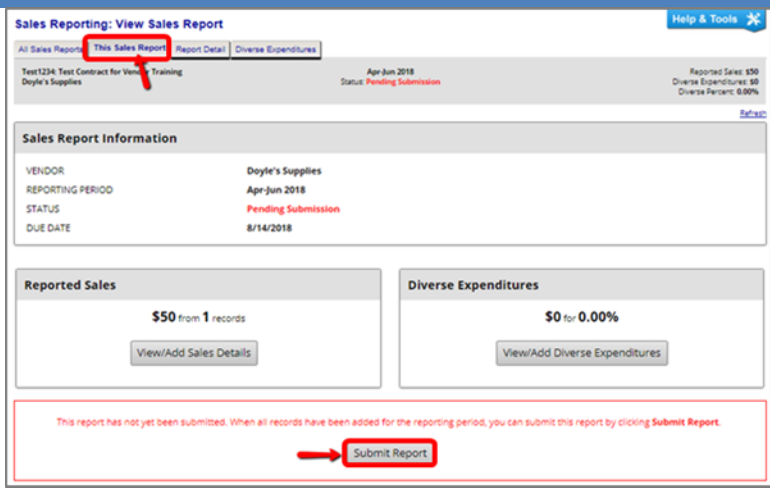
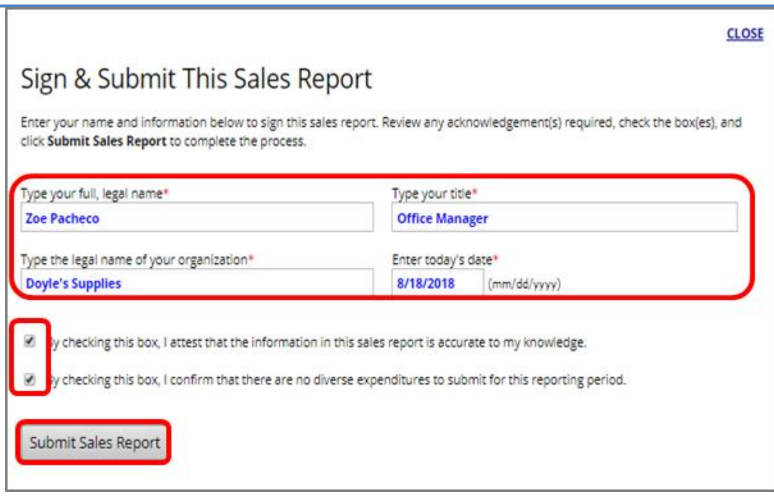


Step 22: ***Submit the Sales Report***

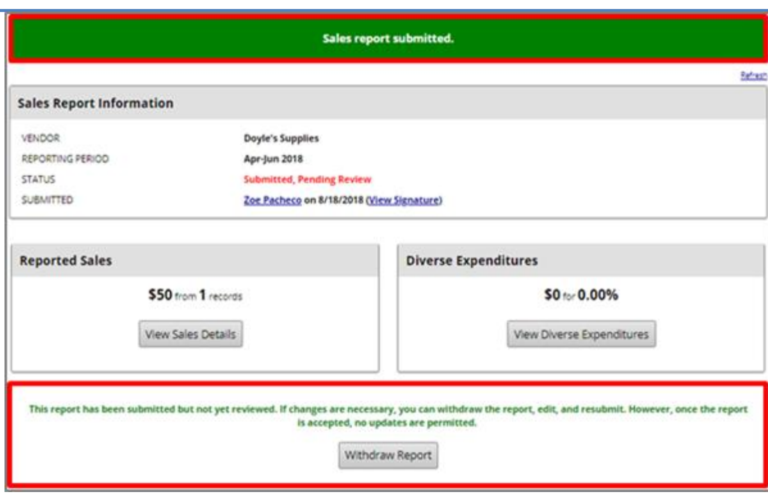
1. Select the **This Sales Report** tab.
2. Click **Submit Report**.



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.



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.***