Job Aid:

How to Create a Bid Package in COMMBUYS CLM

This Job Aid shows how to:

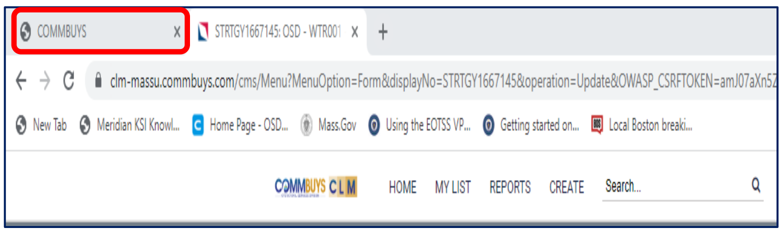
- Create a Bid in COMMBUYS
- Create a Bid Package in CLM to be used in conjunction with a COMMBUYS Bid

Of Special Note:

Bids are initiated in COMMBUYS and are completed by entering data both in COMMBUYS and in the Contract Lifecycle Management (CLM) system.

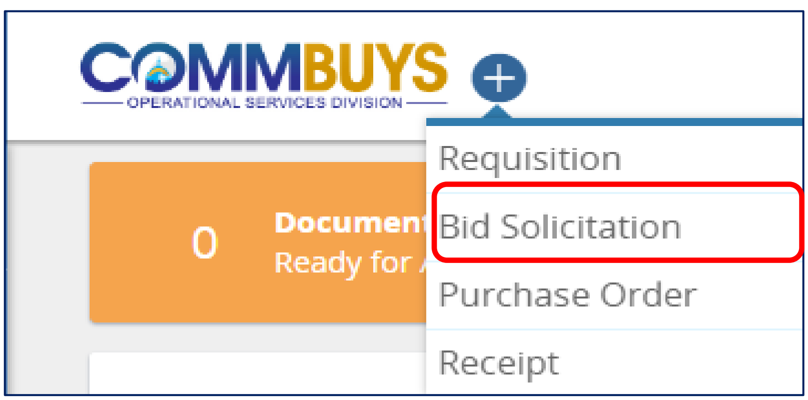
Screenshot	Directions

Step 1: Initiating a bid in COMMBUYS CLM

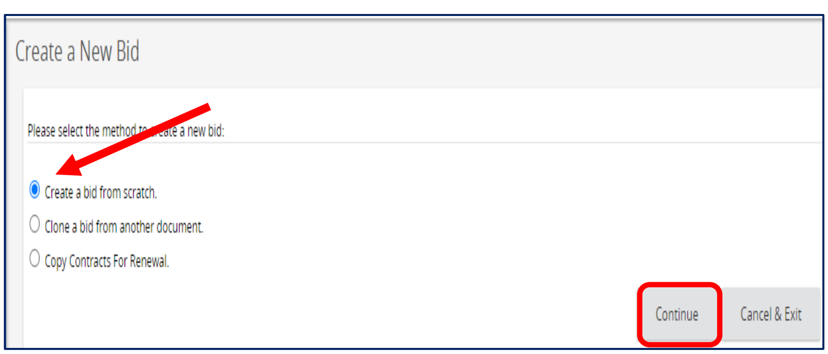


1. Log into COMMBUYS CLM using Single Sign On and click on the COMMBUYS tab at the top of the page.

2. When your COMMBUYS home page displays, click on the **Add Documents** blue and white plus sign icon.

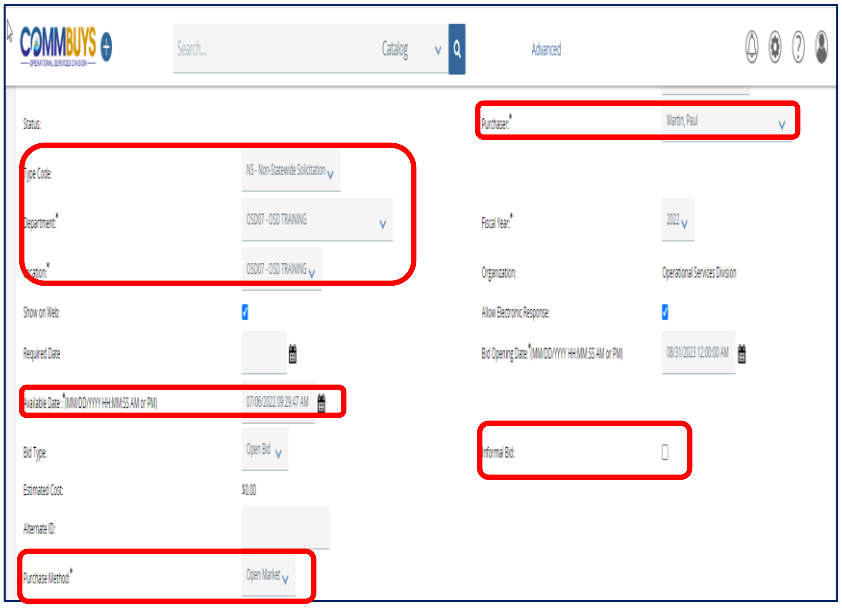


3. Select **Bid Solicitation** from the dropdown menu.



4. Ensure that the radio button for **Create a bid from scratch** is selected then click on the **Continue** button.

Screenshot	Directions



Step 2: Completing the General Tab Page

1. Fields to complete on the top portion of the page include:

Description*: (upper right-hand side of the page) – Enter a description of the bid solicitation. **NOTE:** This is a searchable field, so use unique language that would allow you to locate this transaction at a later time.

Type Code: (left side) - Using the dropdown arrow, select one of the following:

- **NS**: Bid for a non-statewide (departmental) solicitation
- **SS**: Bid for a statewide solicitation – **for OSD use only.**

Department*: (left side) - Click on the down arrow next to the field and select the desired department.

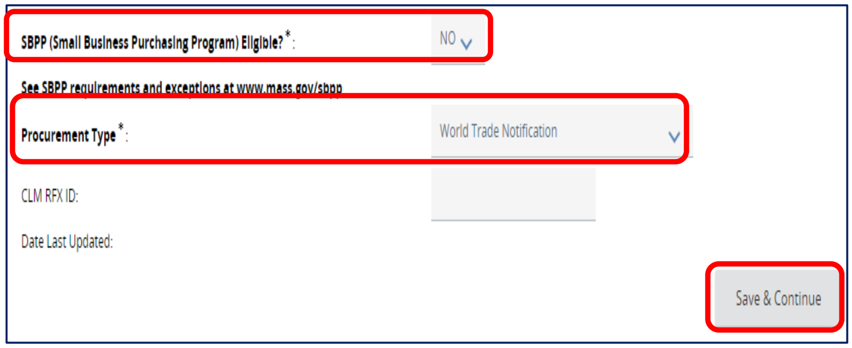
Location*: (left side) - Click on the down arrow next to the field and select the desired location.

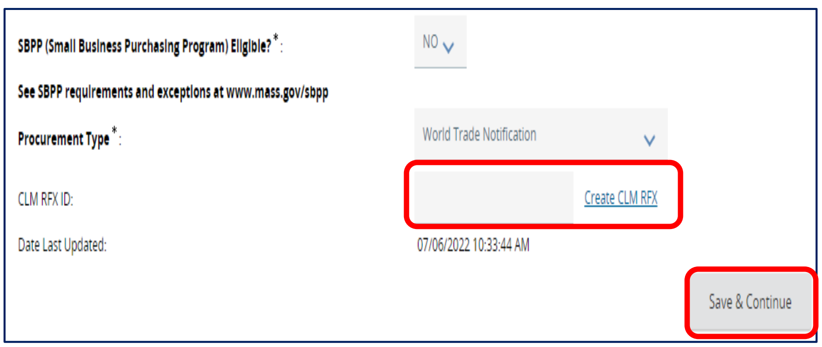
Available Date*: (left side) - Enter the date the bid (solicitation) will be made available for vendors to view and submit quotes. Click on the calendar icon to set the desired month, day, and time (using the slide bars).

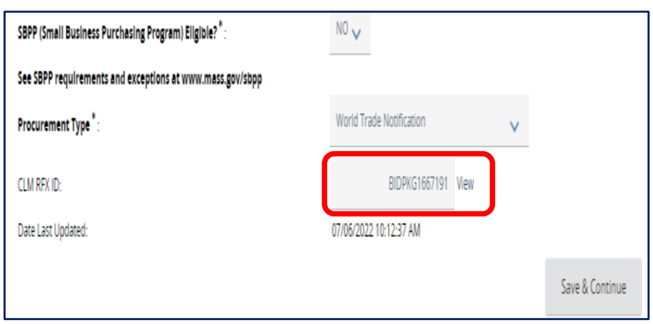
Bid Opening Date*: (right side) - Enter the date that quotes will no longer be accepted and submitted quotes can be opened for viewing. Click on the calendar icon to set the desired month, day, and time (using the slide bars). **NOTE:** If the year must be changed, select the desired year before selecting the month, day, and time.

Purchase Method*: (left side) – Ensure that **Open Market** is selected.

Screenshot	Directions







Fields to complete on the bottom portion of the page include:

SBPP (Small Business Purchasing Program) Eligible?* – If displayed, select **Yes** from the dropdown menu if the transaction will likely total $250K or less annually. Select **No** if over $250K or if not applicable.

Procurement Type: Use the dropdown menu to select the procurement type.

Estimated Award Date: If this field displays, enter the estimated date of award.

2. Click on the **Save and Continue** button. **NOTE:** A red validation error message displays **No Items.**

NOTE: COMMBUYS autogenerates an **Open Market Bid** number at the top of the page, the status displays as **In Progress**, and a **Create CLM RFX** hyperlink displays to the right of the **CLM_rfx_type** field at the bottom of the page.

3. Click on the **Create CLM RFX** hyperlink.

4. Click on the **OK** button in the popup box. **NOTE:** After a few seconds of processing, COMMBUYS autogenerates a **BIDPKG** number in the **CLM RFX ID:** field.

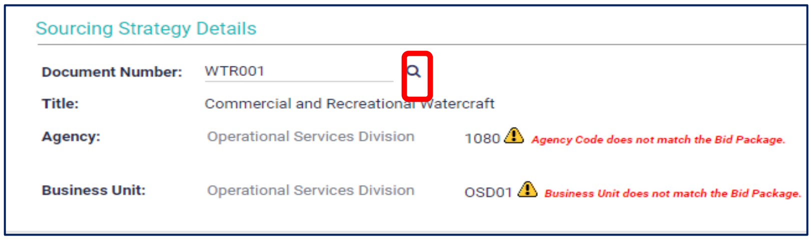
5. Click on the **Save & Continue** button.

6. After a few seconds of processing, click on the **View** hyperlink next to the BIDPKG number in the **CLM RFX ID** field.

NOTE: You are now redirected into CLM in Bid Package mode with a BIDPKG number at the top of the page.

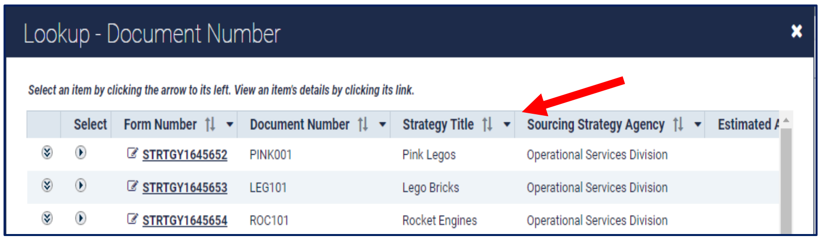
Screenshot	Directions

Step 3: Completing the Sourcing Strategy Details Section

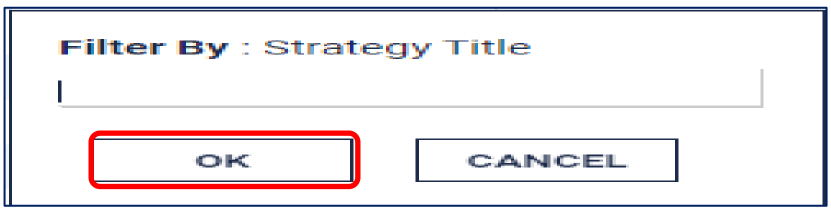


1. If you have not completed a Sourcing Strategy in CLM, enter your contract number in the Document Number field then skip to **Step 4.**

   If you have completed a Sourcing Strategy in CLM, click on the **magnifying glass** search icon

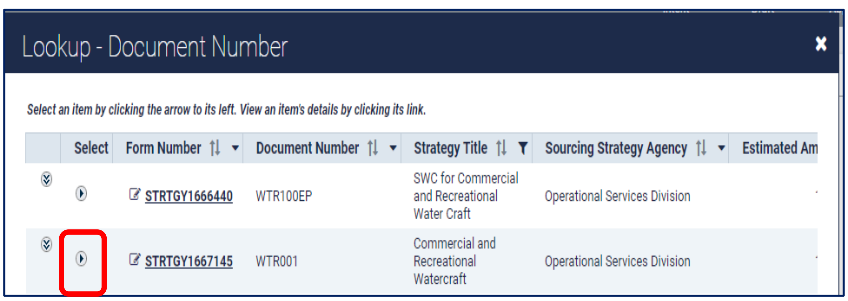


2. When the **Lookup – Document Number** popup screen displays, click on the **triangular down arrow** in the Strategy Title column.

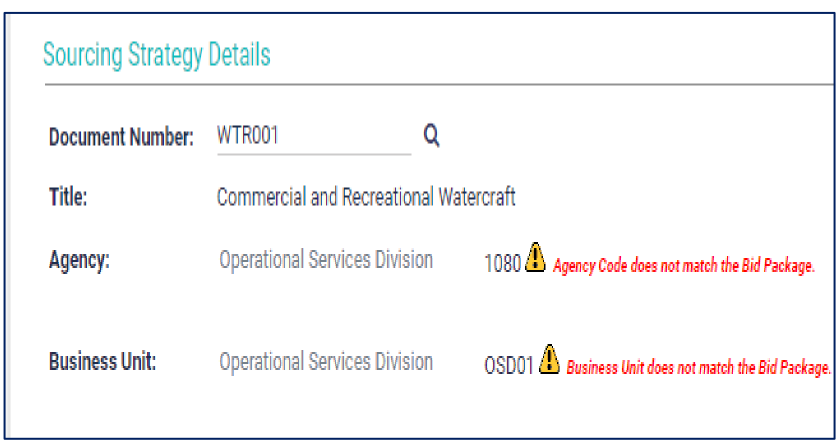


3. Enter the title of your desired contract in the **Filter By: Strategy Title** field in the popup box, then click on the **OK** button.

NOTE: You can also search using the down arrows in the **Form Number, Document Number, Sourcing Strategy Agency**, or **Estimated Amount** fields.

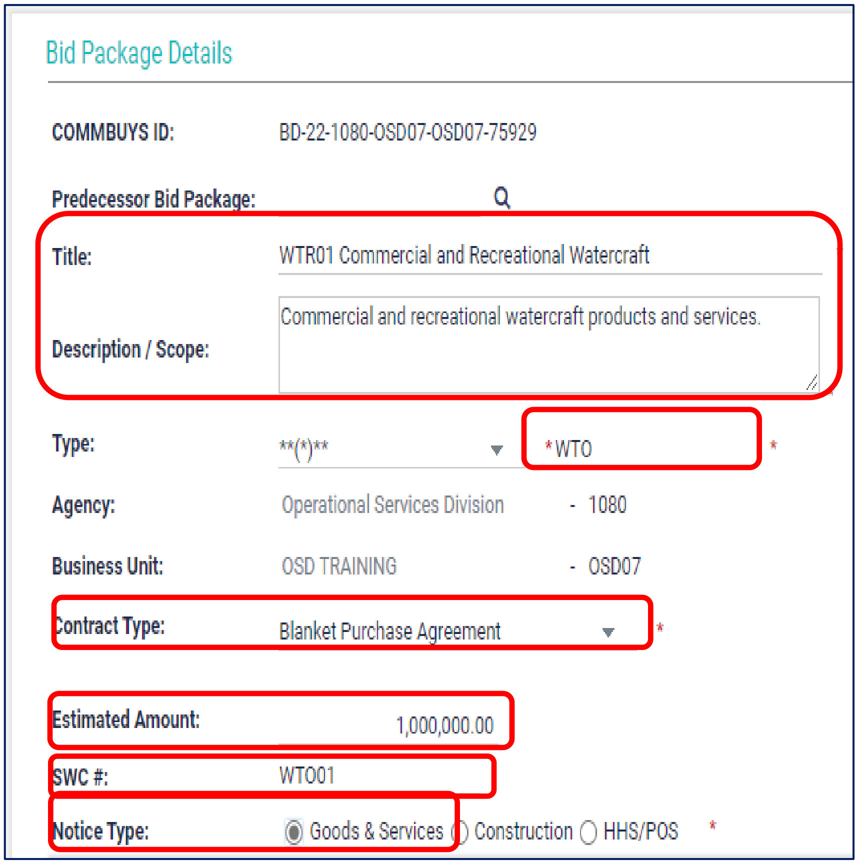


4. Select the desired contract by clicking on the **right arrow** in the **Select** column.



5. The selected **Document Number, Title, Agency,** and **Business Unit** fields auto fill.

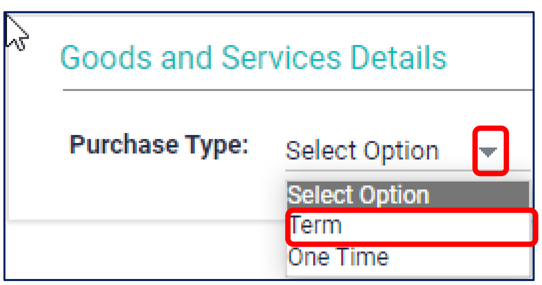
Screenshot	Directions



Step 4: Completing the Bid Package Details Section

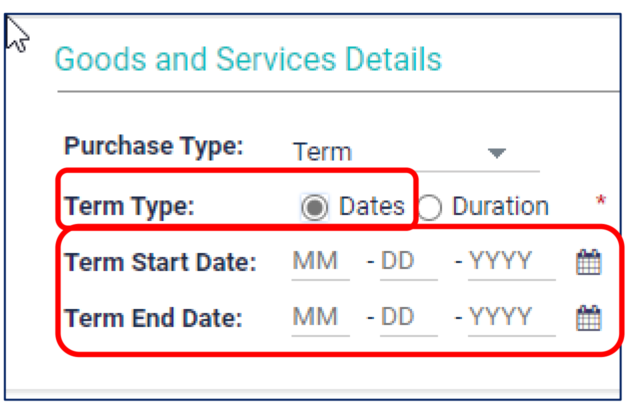
1. If not auto filled, enter the title of the contract in the **Title** field.
2. Enter the contract description in the **Description/Scope** field.
3. If not auto filled, enter the type of solicitation in the Type field.

   NOTE: If you are issuing a World Trade Organization Notice of Intent, **WTO** displays in the right-hand field next to **Type.**
4. Click on the **down arrow** in the **Contract Type** field and select **Blanket Purchase Agreement** from the dropdown menu.
5. If not auto filled, enter the expected amount of the contract in the **Estimated Amount** field.
6. Enter the contract number in the **SWC #** field.
7. Select the appropriate radio button in the **Notice Type** field.



Step 5: Completing the Goods and Services Details Subsection

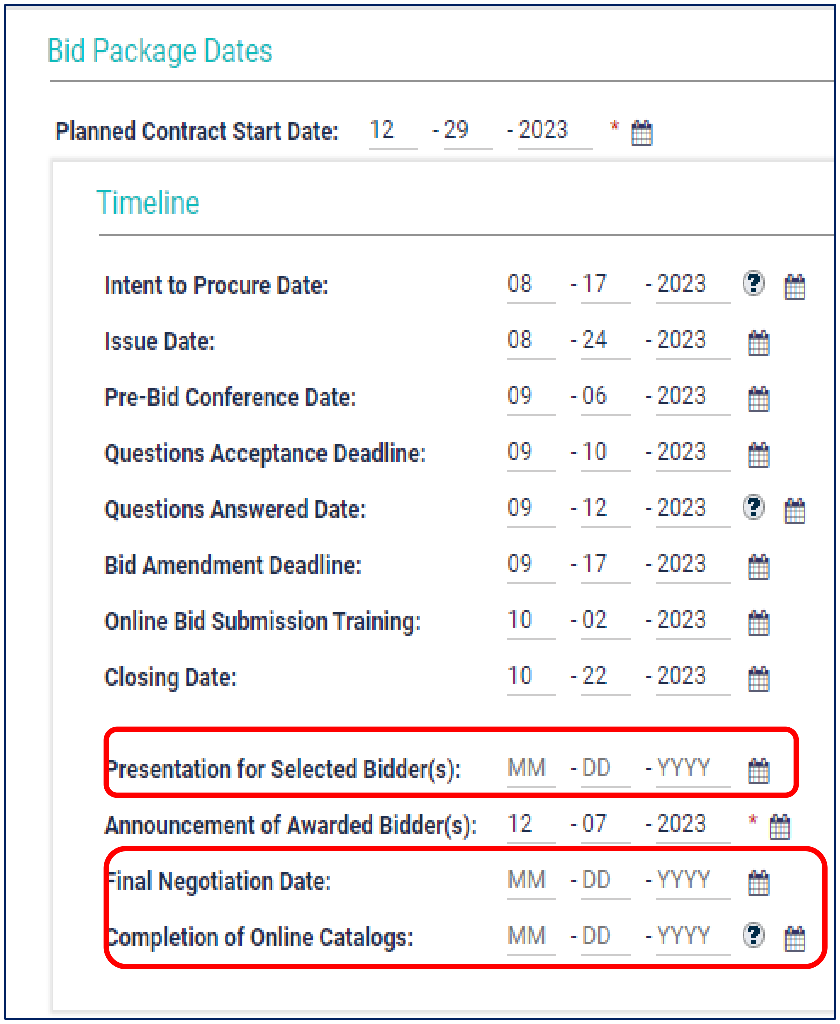
1. If Goods & Services has been chosen in the Notice Type field above, click on the **down arrow** in the **Purchase Type** field and select **Term** from the dropdown menu.



2. Select the radio button for **Dates** in the **Term Type** field.
3. Enter the date that the contract will begin in the **Term Start Date** field.
4. Enter the date that the contract will end in the **Term End Date** field.

   NOTE: The calendar icon can also be used to enter these dates.

Screenshot	Directions



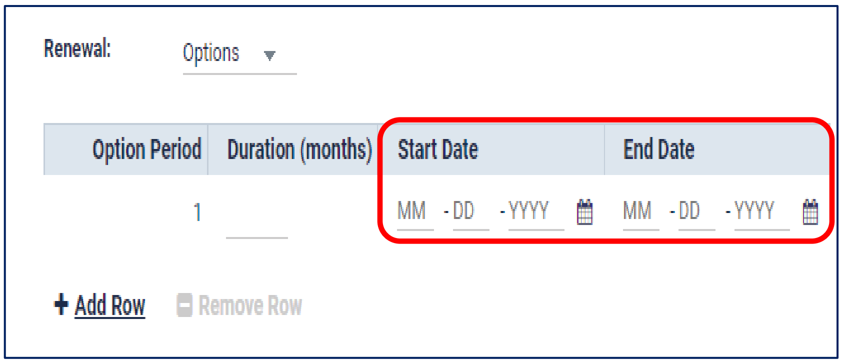
Step 6: Completing the Bid Package Dates Section

If not auto filled, enter the start date of the contract in **Planned Contract Start Date** field. Most fields in the **Timeline** subsection will auto fill with a recommended schedule of dates. These dates are changeable. The following fields can be entered when appropriate but are not available for all contracts.

- ***Presentation for Selected Bidders***
- ***Final Negotiation Date***
- ***Completion of Online Catalogs***

NOTE: The next section – **Bid Package Documents** requires no entry at this time. Go to **Step 7.**

Screenshot	Directions



Step 7: Completing the Statewide Contract Dates Section

NOTE: The **Effective Date** auto fills.

1. Using the fields or the calendar icon, enter the contract **Effective Date** and the **Initial End Date.**

2. In the **Renewal** field, if there are no renewals, leave the default as **None.**

   To add renewal information:

   - Click on the **down arrow** next to the field and select **Options** from the dropdown menu. The **Option Period** column defaults to **1.**

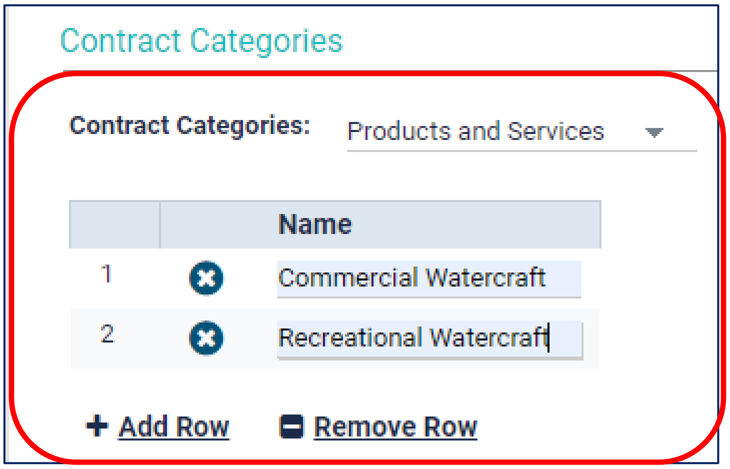
   - Enter the **length of the renewal** in the **Duration (months)** column.

   NOTE: Entering a number in this field will populate the next two fields.

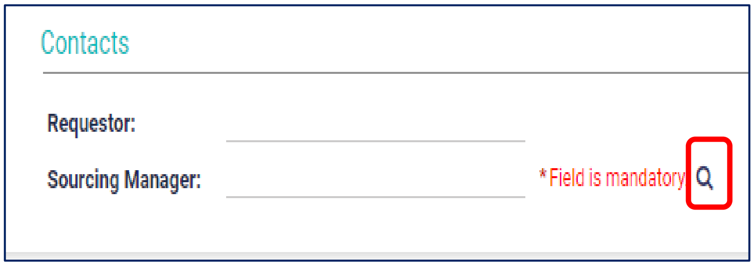
   - Enter the **Start Date** if not populating the Duration (months) field.

   - Enter the **End Date** if not populating the Duration (months) field.

   - Click on the **Add Row** hyperlink to add additional renewal periods.

Screenshot	Directions
	**Step 8: Completing the Contract Categories Section** If the **Contract Categories** and **Name** fields do not auto fill, enter the type of category in the Contract Categories field, and enter the name of the categories in the Name field. Use the **Add Row** feature if more than one category is being entered.

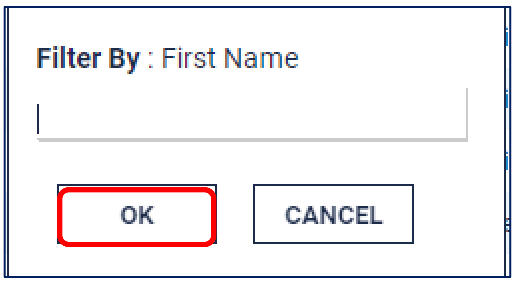
Screenshot	Directions



Step 9: Completing the Contacts Section.

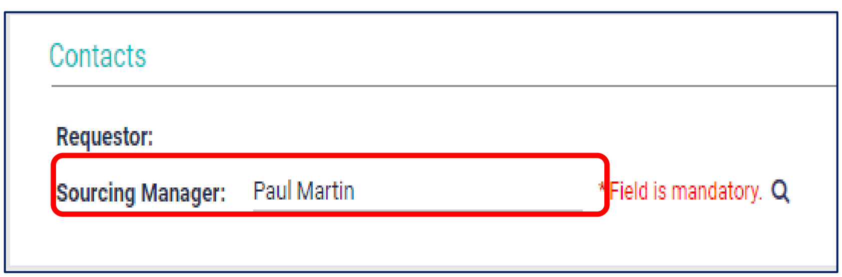
1. Leave the **Requestor** field blank and click on the **magnifying glass** search icon next to the **Sourcing Manager** field

2. In the **Lookup – Sourcing Manager** popup screen, click on the **down (triangular) arrow** in the **First Name** column.



3. Enter your first name in the **Filter By: First Name** popup screen and click on the **OK** button.

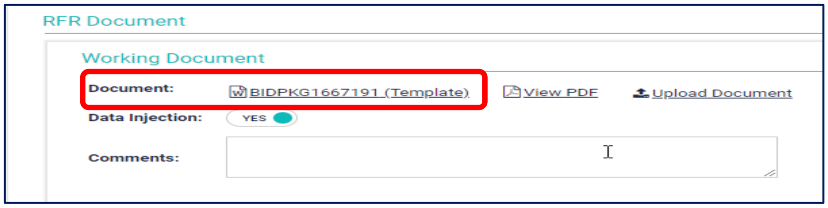
4. When the **Lookup – Sourcing Manager** popup screen re-displays, click on the **right arrow** in the **Select** column for your name.

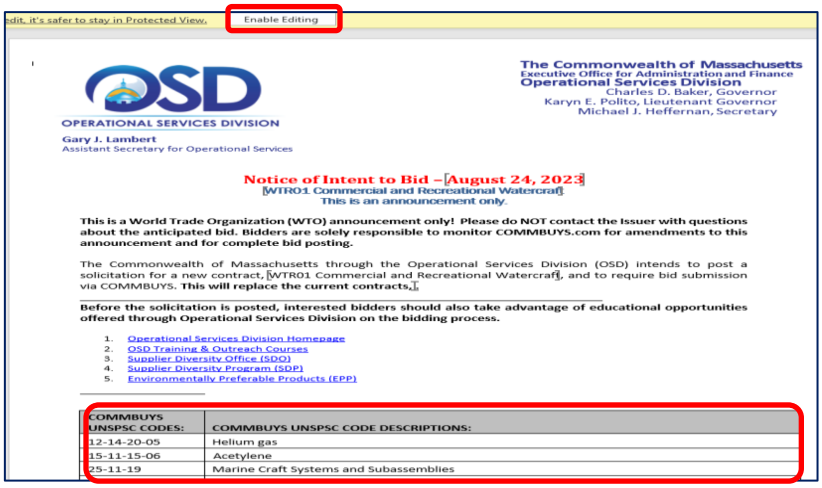


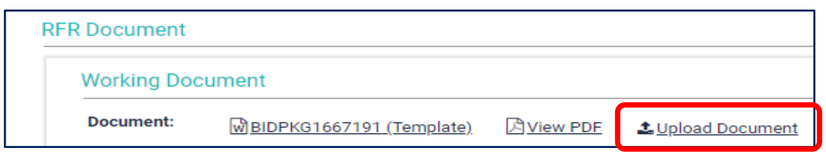
5. When the page re-displays, your name will display in **the Sourcing Manager** field.

6. Click on the **SAVE** button at the bottom of the page.

NOTE: The above search process can also be conducted using the **Last Name** column.





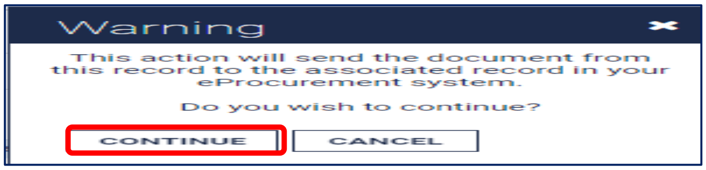


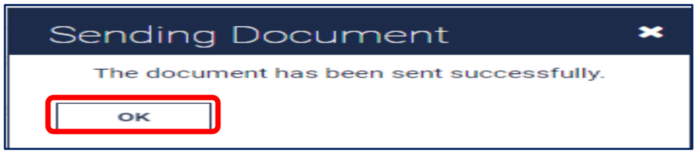
Step 10: Completing the RFR Document/Working Document Subsection

NOTE: This step is for completing a WTO Notice of Intent. To complete this step for an RFR only, got to Step 11.

1. Click on the **Template** hyperlink in the **Document** field, then click on the **.docx** box that displays on the corner of your screen.
2. When the template displays, click on the **Enable Editing** button on the yellow stripe at the top, and review and edit the template wording as needed.
3. Scroll down to the **UNSPSC chart,** add the relevant **UNSPSC Codes** and **descriptions** to the table, then delete the rest.
4. On the top task bar, click on **File**, then **Save As**, rename the file as needed on the **Save As** popup screen and click on the **Save** button.
5. Click on the **X** at the top right of the Notice of Intent page to close it.
6. When the page redisplays, click on the **Upload Document** hyperlink.
7. Select the edited and renamed NOI document from the saved location popup screen then click on the **Open** button on the popup screen.
8. The edited and renamed document now appears in the **Document** field. The **Data Injection** field defaults to **Yes.**
9. Enter comments in the **Comments** field if desired, then click on the **SAVE** button at the bottom of the page. This hyperlinks the NOI in the Documents field.
10. Click on the **SEND LETTER OF INTENT** button at the bottom of the page.

Screenshot	Directions

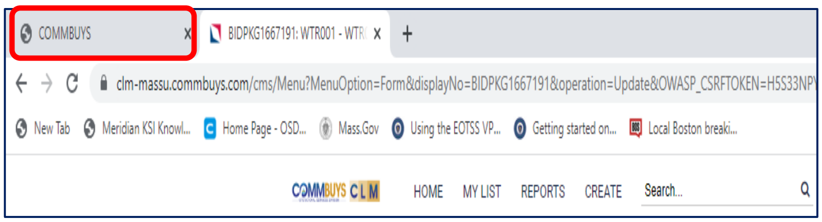


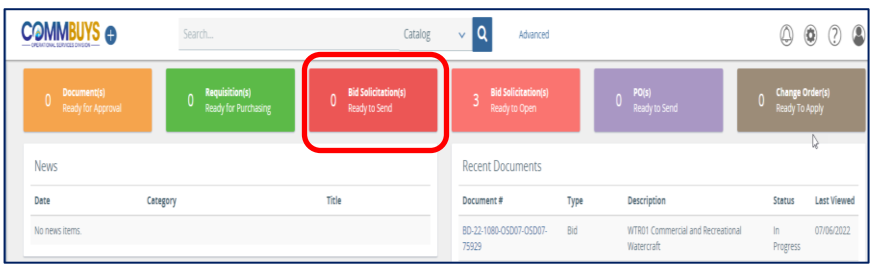


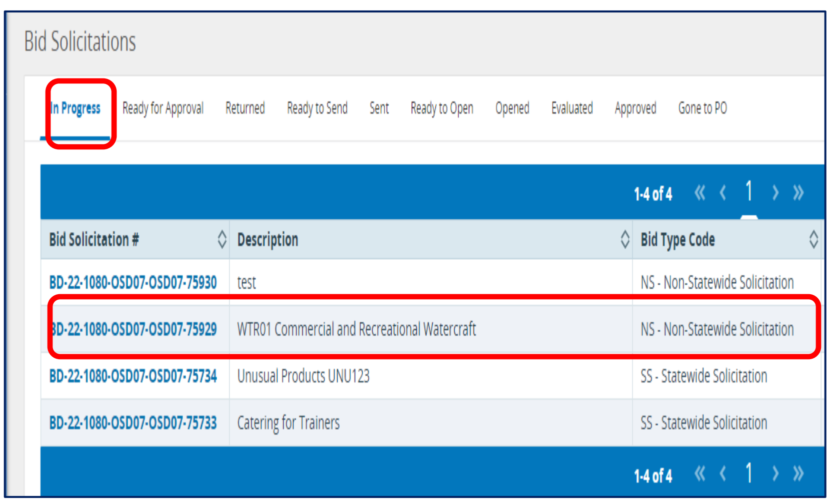
11. Click on the **CONTINUE** button on the **Warning** popup screen.

12. Click on the **OK** button on the **Sending Document** popup screen.

NOTE: At this point, you will return to **COMMBUYS** to reopen the bid.







Step 11: Reopening the Bid in COMMBUYS

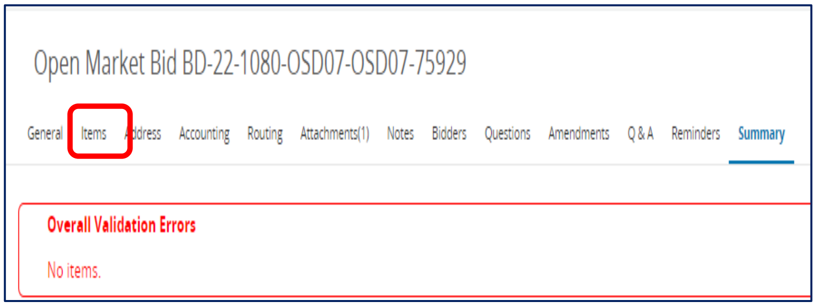
1. Click on the **COMMBUYS** tab at the top of the screen. If your Bid displays, go to **Step 12.**
2. If not, click on the COMMBUYS logo to display your COMMBUYS homepage.
3. Click on the **Bid Solicitation(s) Ready to Send** red tile box at the top of the page. **NOTE:** You may also find this transaction in the **Recent Documents** section.
4. Click on the **In Progress** tab, then click on the hyperlink for the desired bid in the **Bid Solicitation #** column.

NOTE: The bid opens to the **Summary** tab page.

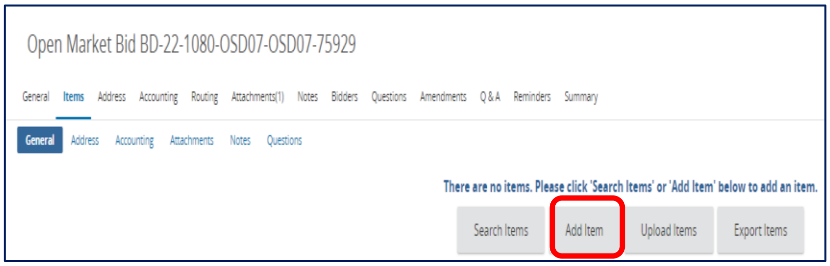
Screenshot	Directions

Step 12: Completing the Items Tab

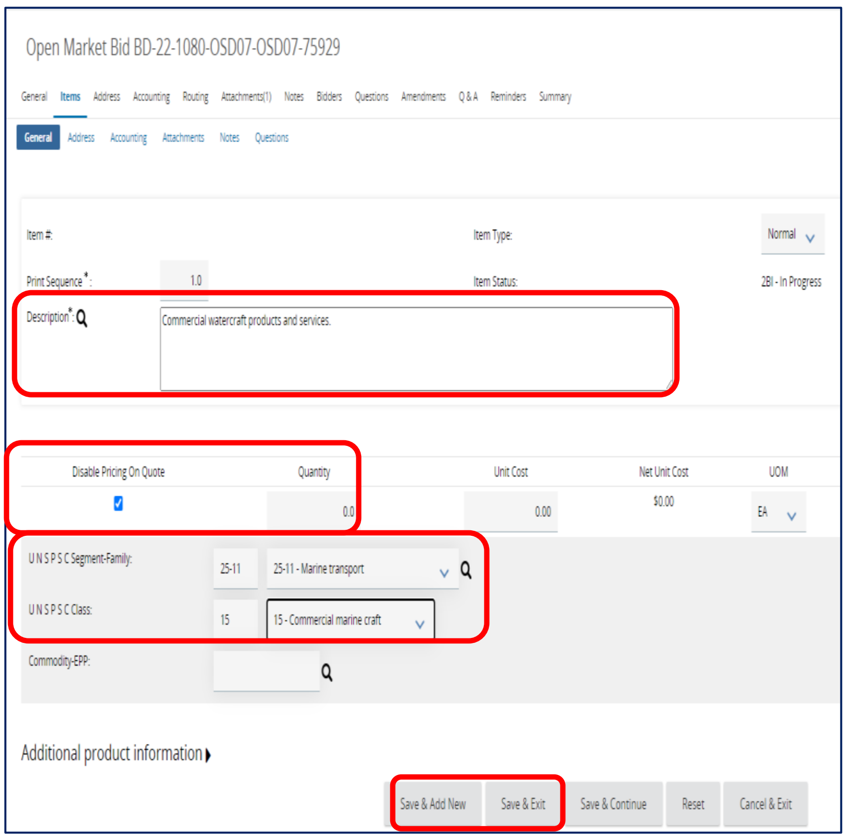
NOTE: If a Notice of Intent was issued, the **Attachments** tab displays a **(1)** indicating that the NOI was received by COMMBUYS when sent from CLM.



1. Click on the **Items** tab.



2. Click on the **Add Item** button.

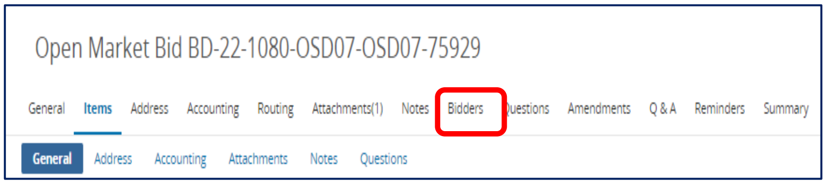


3. Enter a description of the bid in the **Description** field.
4. Select the **Disable Pricing on Quote** checkbox.
5. Change the **Quantity** field to **1.0.**
6. Enter the 4-digit UNSPSC (United Nations Standard Products and Services Code) in the **UNSPSC Segment-Famil**y field.

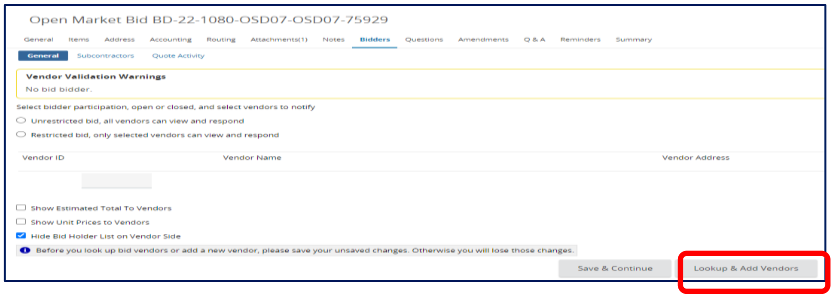
   NOTE: This code can be searched for by clicking on the **magnifying glass search icon.**
7. Enter the 2-digit UNSPSC Class code in the **UNSPSC Class** field.
8. If you have additional items, click on the **Save & Add New** button; otherwise click on the **Save & Exit** button.

Screenshot	Directions

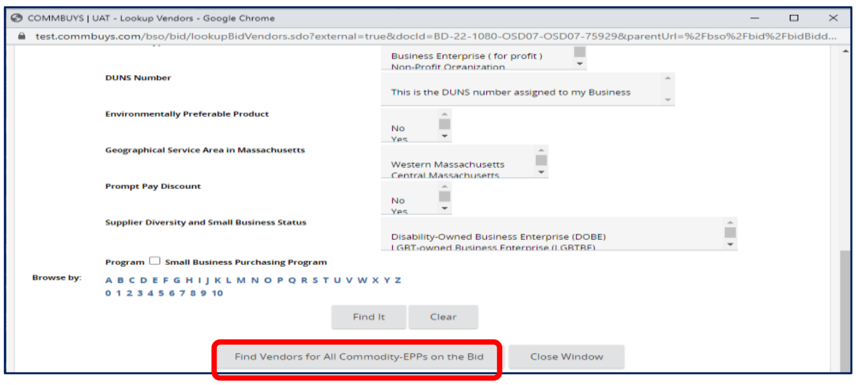
Step 13: Completing the Bidders Tab



1. Click on the **Bidders** tab.

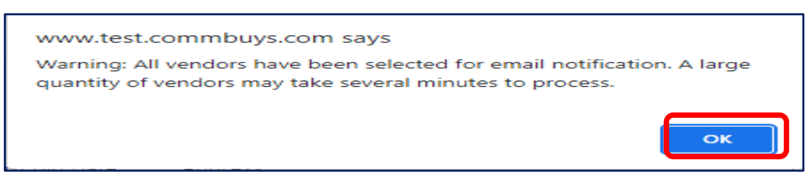


2. Click on the **Lookup & Add Vendors** button on the bottom of the page.



3. Scroll to the bottom of the **Lookup & Add Reference Vendors** popup screen and click on the **Find Vendors for All Commodity-EPPs on the Bid** button.

4. Select all Vendors by clicking on the **Select** checkbox at the top of the **Select** column.

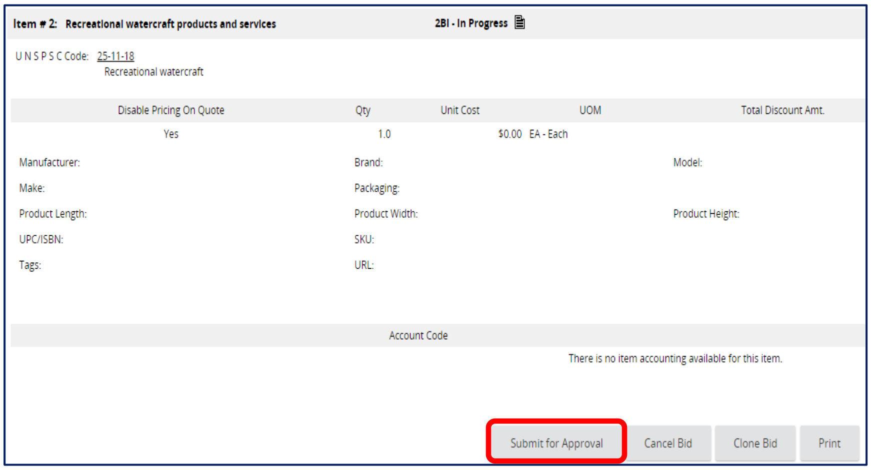


5. Click on the **OK** button in the popup box.

6. Click on the **Save & Exit** button at the bottom of the page. **NOTE:** The page re-displays with the list of selected vendors.

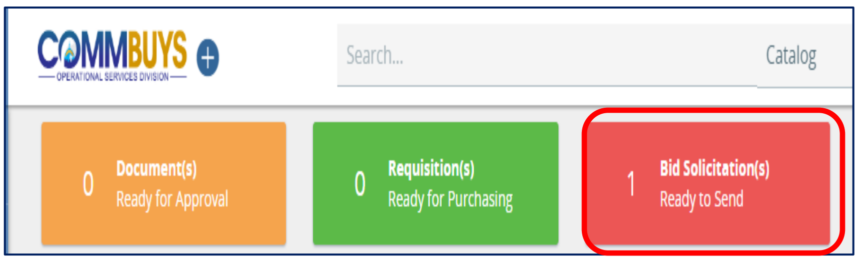
NOTE: To complete this process for a WTO Notice of Intent continue to **Step 14.** For an RFR-only, go to **Step 15.**

Screenshot	Directions

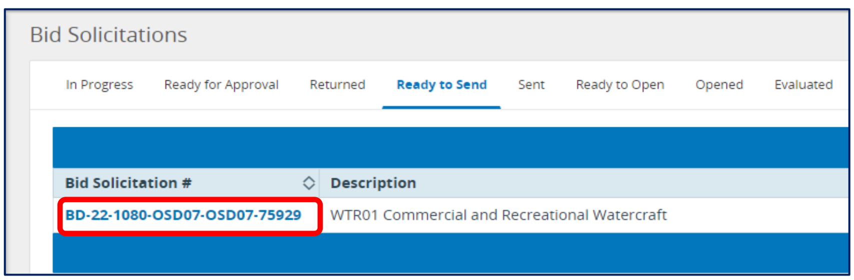


Step 14: Completing the Summary Tab

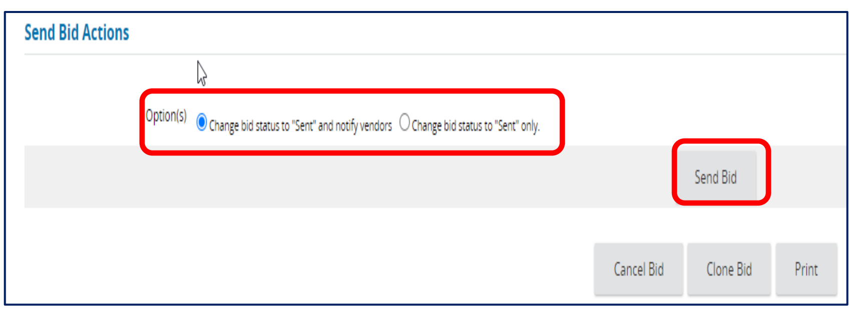
1. Click on the **Summary** tab.
2. Click on the **Submit for Approval** button at the bottom of the page.
3. Click on the **Continue** button. **NOTE:** The status changes from **In Progress** to **Ready for Approval.**



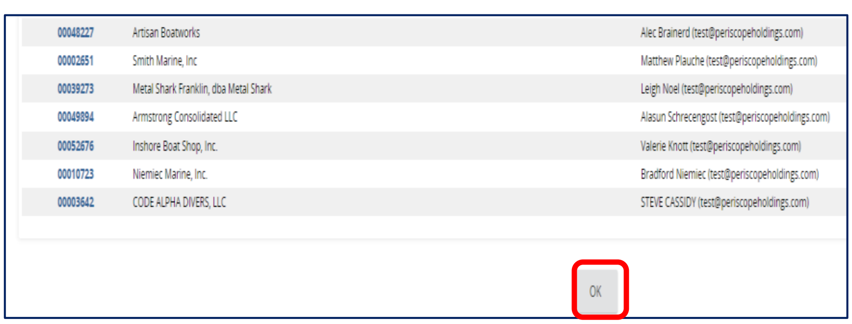
4. After approval is received, log back into COMMBUYS and click on the red **Bid Solicitation(s) Ready to Send** tile box.



5. Click on the blue hyperlink for the desired bid in the **Bid Solicitation#** column. The bid opens to the **Summary** page.

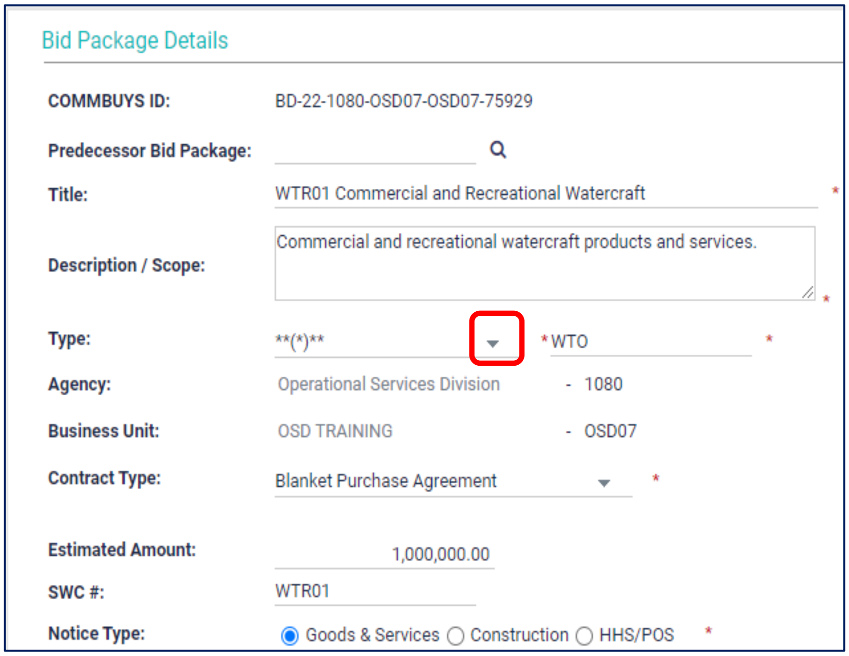


6. In the **Send Bid Actions** section at the bottom of the page, ensure that the radio button for **Change bid status to "Sent" and notify vendors** is selected,
7. Click on the **Send Bid** button.



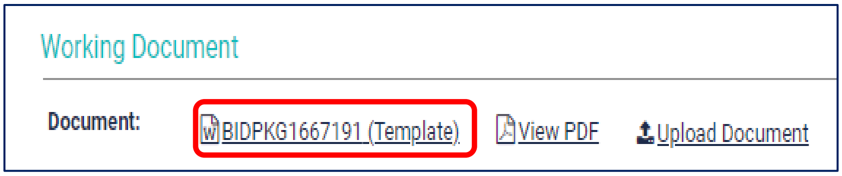
8. When the list of vendors displays, click on the **OK** button at the bottom of the page. **NOTE:** The status changes to **Sent.**

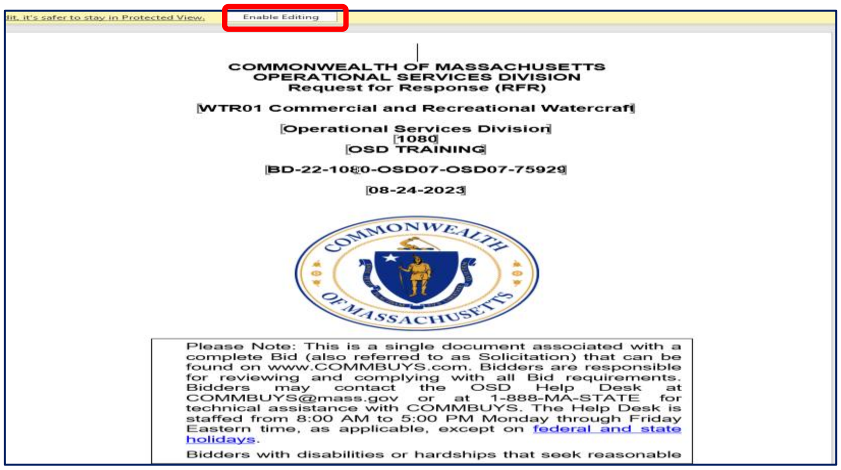
Now, return to the CLM BIDPKG page by clicking on the BIDPKG browser tab at the top of your screen.

Screenshot	Directions
	**Step 15: Completing the Bid Package Details Section** 1. Click on the down arrow in the **Type** field containing the asterisks and select **Request for Response** from the dropdown menu. 2. Click on the **SAVE** button at the bottom of the page.

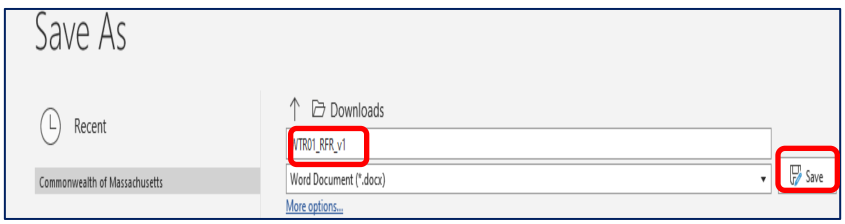
Screenshot	Directions

Step 16: Completing the RFR Document/Working Document Subsection

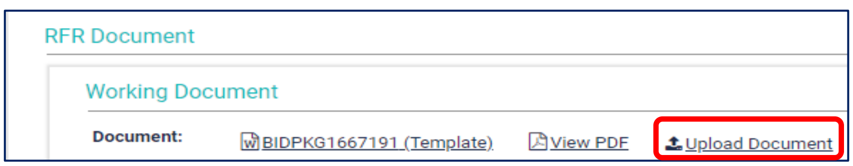




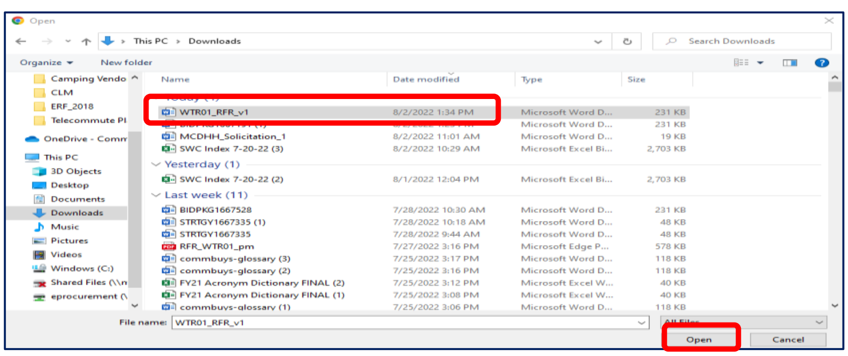
1. Click on the **SAVE** button at the bottom of the page.
2. Click on the **COMPLETE** button at the bottom of the page.
3. Click on the Template hyperlink, then click on the **.docx** box on the corner of your screen.
4. When the document displays, click on the **Enable Editing** button and edit the template.
5. After editing, click on **File** and **Save As**.



6. Rename the file.
7. Click on **Save**.
8. Click on the **X** at the top right of the screen to close the document.



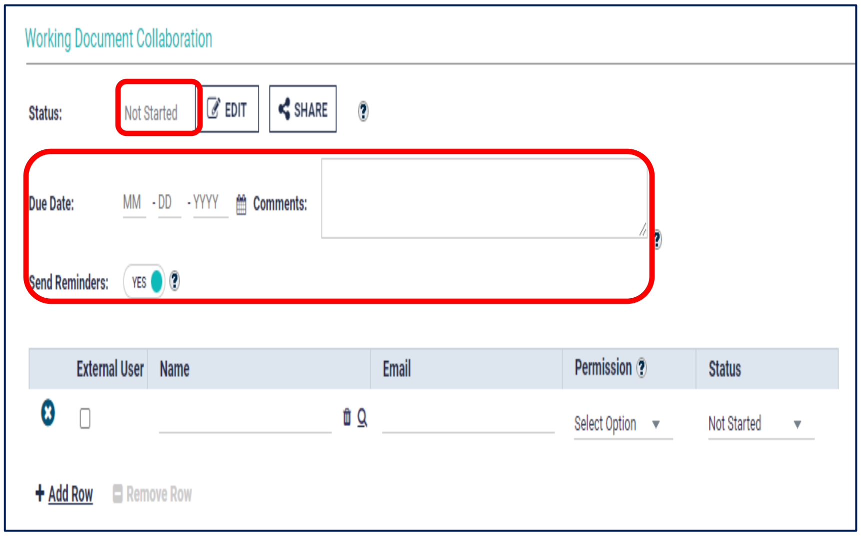
9. When the page re-displays, click on the **Upload document** hyperlink.



10. Select the edited RFR document from the popup screen and click on the **Open** button.

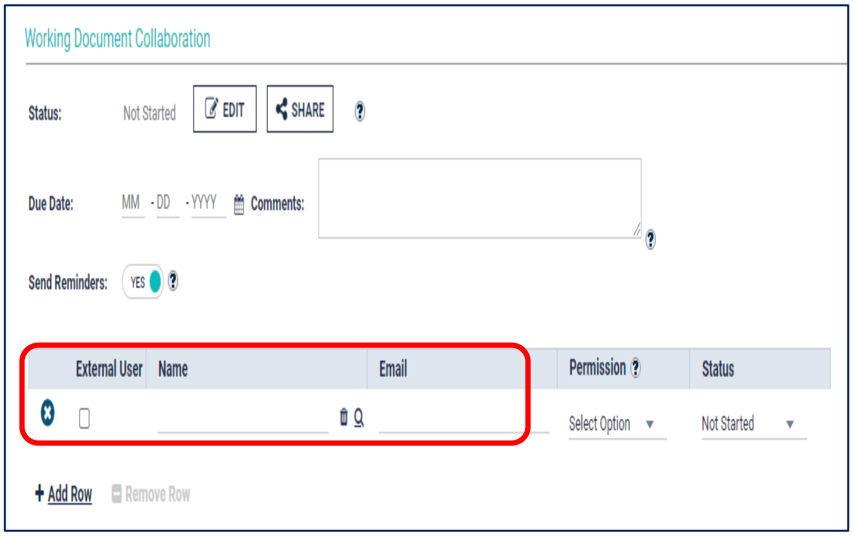
NOTE: Leave the **Data Injection** field set to **Yes** and enter comments in the **Comments** field if desired.

11. Click on the **Save** button.

Screenshot	Directions
	**Step 17: Completing the Working Document Collaboration Subsection** **NOTE:** At various stages in the **Contract Lifecycle Management** process, collaboration occurs among members of Strategic Sourcing Teams (SSTs). 1. The Status **Not Started** displays. Enter a date that collaboration comments will be due in the **Due Date** field. 2. Enter comments about the collaboration in the **Comments** text box. 3. Ensure that **YES** displays in the **Send Reminders** field. **NOTE:** Reminders will be sent 7 days and 2 days prior to those collaborators who have not completed the collaboration. **NOTE:** Collaborators can include users who are either external or internal to your work group. • To add an external collaborator, go to **Step 18.** To add an internal collaborator, go to **Step 19.**

Screenshot	Directions

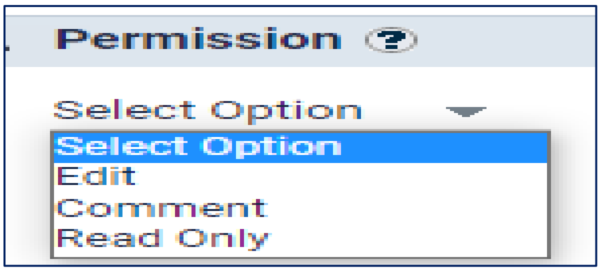
Step 18: Adding an External Collaborator



1. Select the **External User** checkbox.

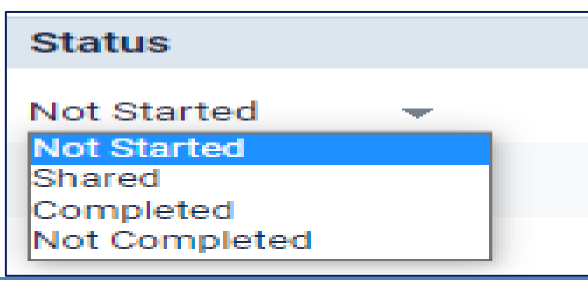
2. Enter the collaborator's **Name** and **Email** address in the respective fields.

   NOTE: The collaborator can be removed by clicking on the blue and white X icon at the beginning of the row. Additional users can be added by clicking on the **Add Row** hyperlink at the bottom of the subsection.



3. Click on the **down arrow** in the **Permission** column and select:

   - **Edit** - if the user will have the ability to edit the document.
   - **Comment** – if the user cannot edit the document but can enter comments about it.
   - **Read Only** – if the user can review the document but cannot edit or enter comments.

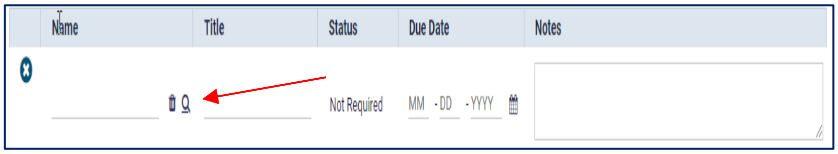


   NOTE: The Status column displays Not Started for each user prior to the start of the collaboration.

Go to Step 20.

Screenshot	Directions

Step 19: Adding an Internal Collaborator



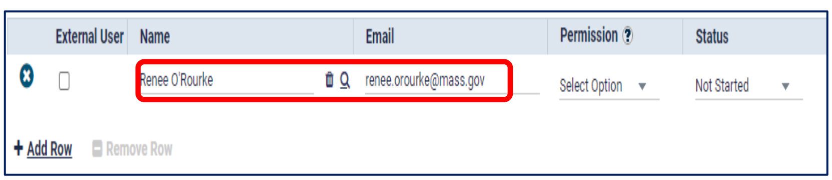
1. Click on the **magnifying glass** search icon.

2. In the **Lookup – Collaborator Name** popup box, click on the down **triangle** in the **Full Name** column.

3. In the **Filter By: Full Name** popup box, enter the collaborator's name, then click on the **OK** button.

4. When the **Lookup – Collaborator Name popup** box re-displays, click on the **right arrow** in the **Select** column.

   NOTE: Do not click on the USER hyperlink in the Form Number column.

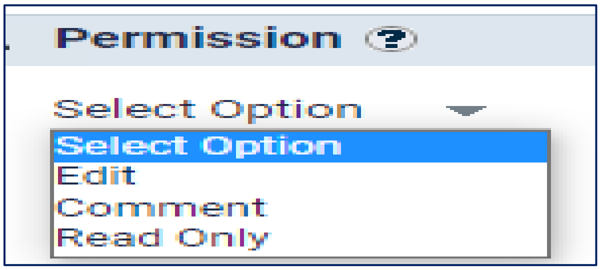


5. The selected internal collaborator's **Name** and **Email** address now display in the respective fields.

NOTE: The collaborator can be removed by clicking on the blue and white X icon at the beginning of the row. Additional users can be added by clicking on the **Add Row** hyperlink at the bottom of the subsection.

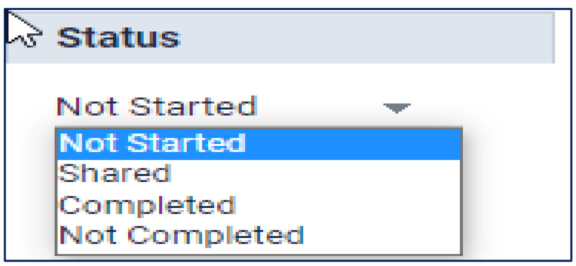
CONTINUED ON NEXT PAGE.

Screenshot	Directions



6. Click on the **down arrow** in the **Permission** column and select:

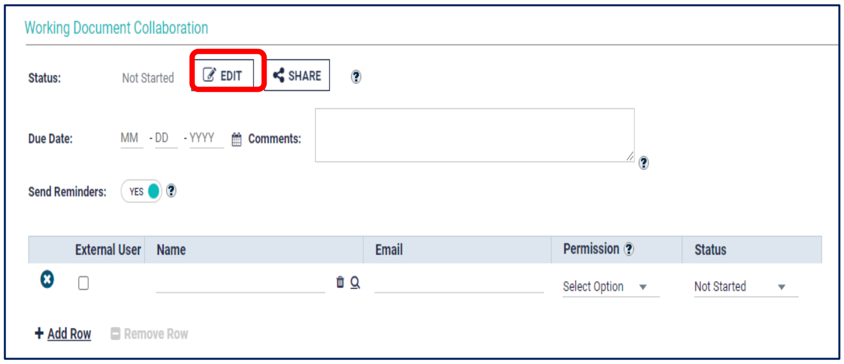
    - **Owner** - if the user selected will be an owner of the document.
    - **Edit** - if the user will have the ability to edit the document.
    - **Comment** – if the user cannot edit the document but can enter comments about it.
    - **Read Only** – if the user can review the document but cannot edit or enter comments.

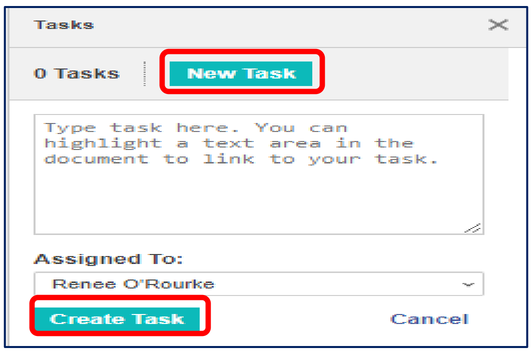


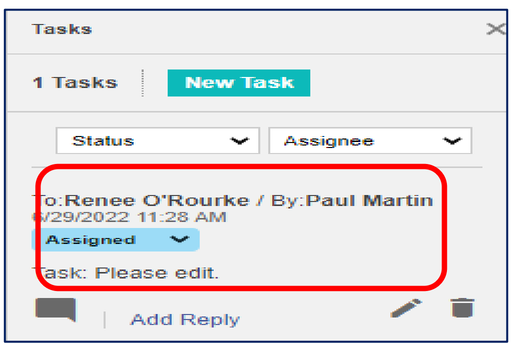
NOTE: The Status column displays Not Started for each user prior to the start of the collaboration.

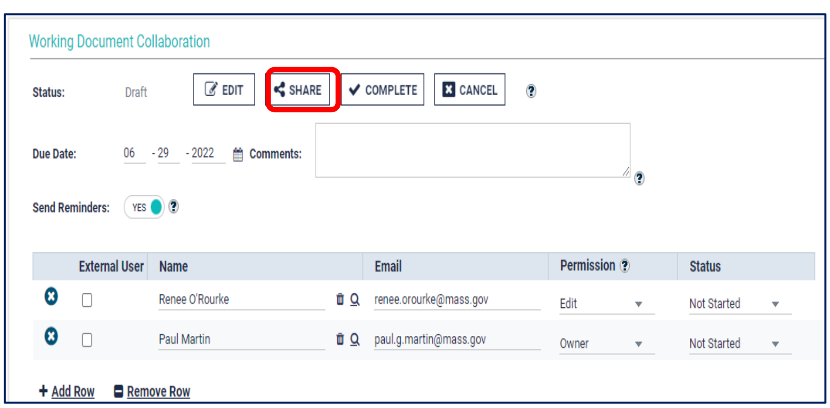
Go to Step 20.

Screenshot	Directions









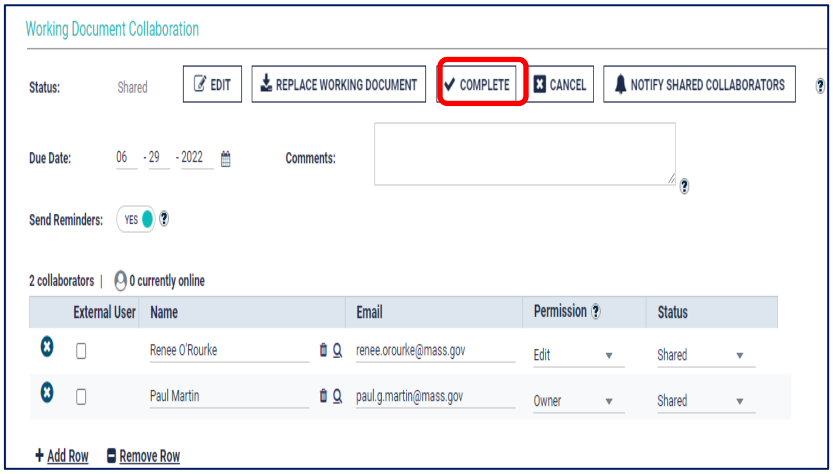
Step 20: Starting the Collaboration Process

1. Click on the **EDIT** button. When you do, your name is added to the list of collaborators.
2. Click on the **New Task** button on the left side of the page.
3. When the New Task section redisplays, click in the **text box** and enter a task.
4. Click on the **down arrow** in the **Assigned To:** field and select a collaborator for the assigned task.
5. Click on the **Create Task** button.

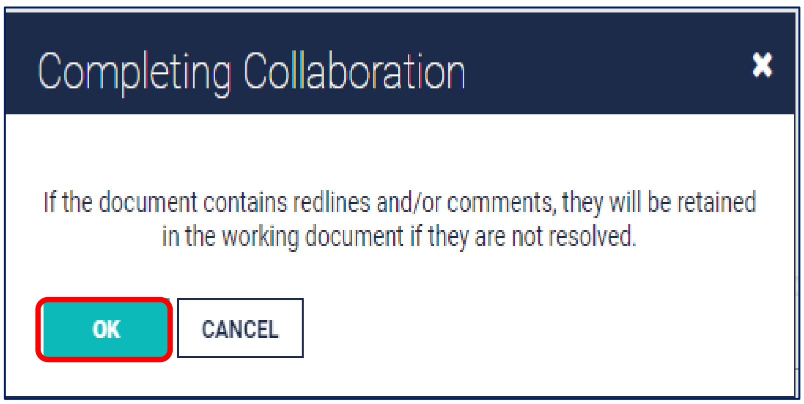
   NOTE: The New Task screen re-displays with the entered information.

6. Click on the **GO TO RECORD** button at the bottom of the page to return to the **Working Document Collaboration** subsection. The status is **Draft.**
7. Click on the **SHARE** button.

Screenshot	Directions

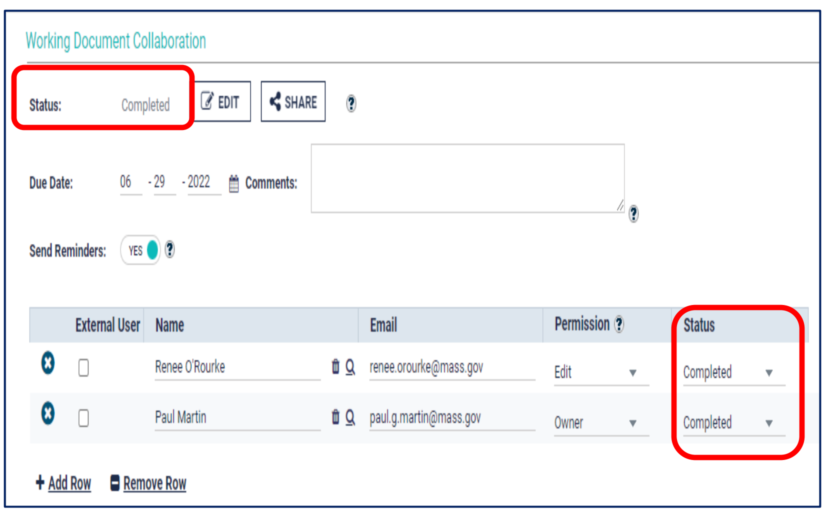


8. When collaboration is completed, click on the **COMPLETE** button.



9. Click on the **OK** button in the **Completing Collaboration** popup box.

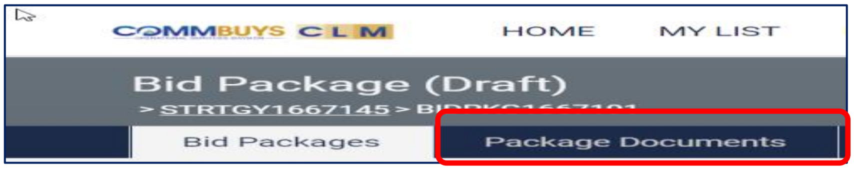
NOTE: It is important to ensure that redlines and comments are resolved at this stage in the process.



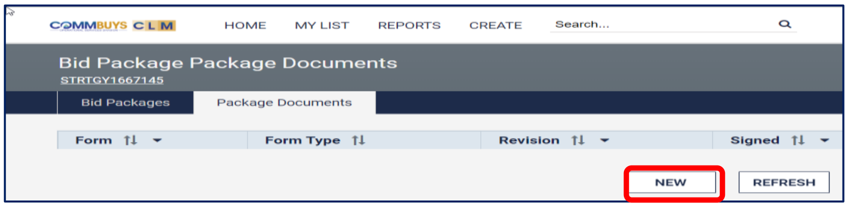
10. The status changes to **Completed.**

Screenshot	Directions

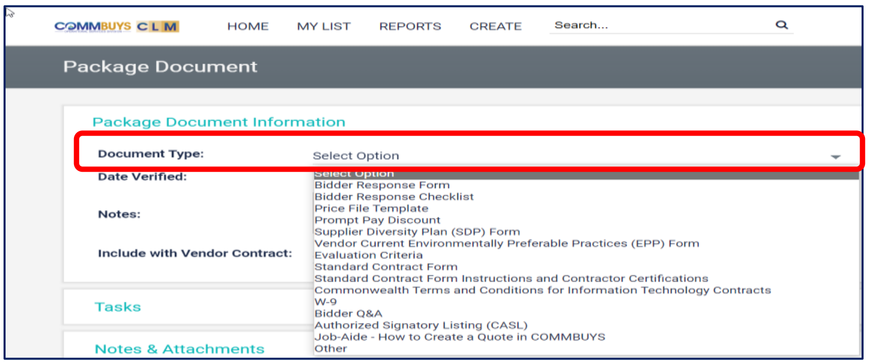
Step 21: Accessing the Package Documents Tab



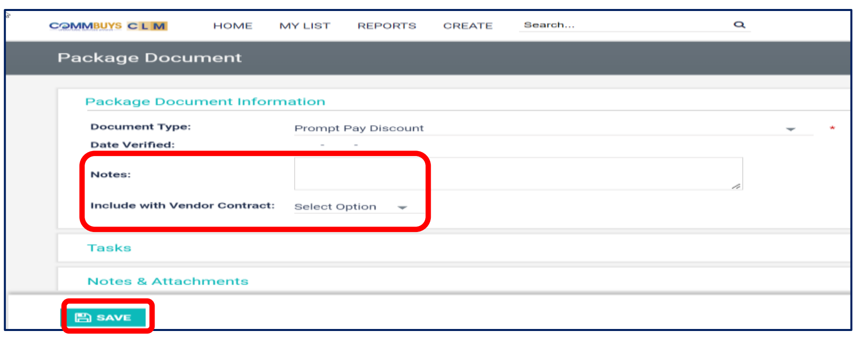
1. Click on the **Package Documents** tab near the top of the page.



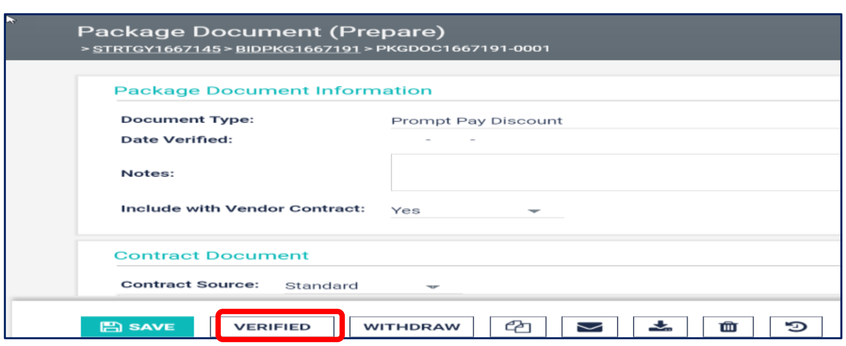
2. Click on the **NEW** button.



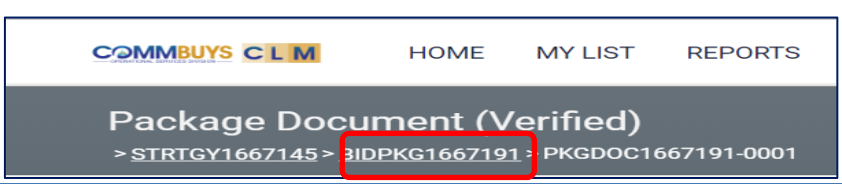
3. In the Document Type field, click on the down arrow next to Select Option, and select the desired document.



4. Add notes if desired.
5. Click on the down arrow next to the **Include with Vendor Contract** field and select **Yes** from the dropdown menu.
6. Click on the **SAVE** button.

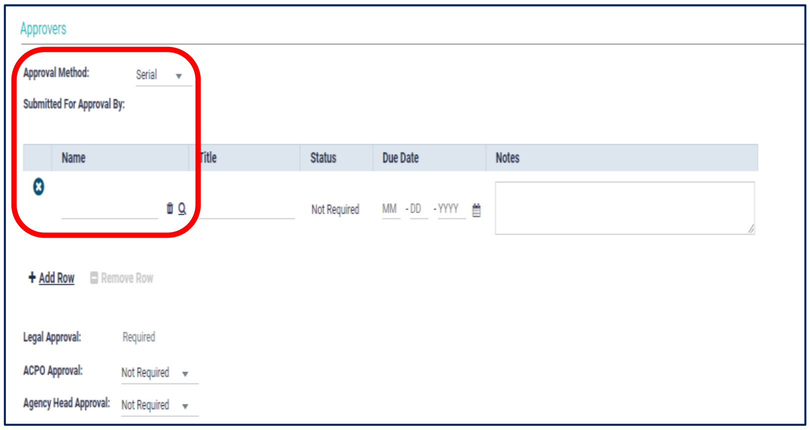


7. Click on the **VERIFIED** button at the bottom of the page.



8. Click on the **BIDPKG** hyperlink at the top of the page.

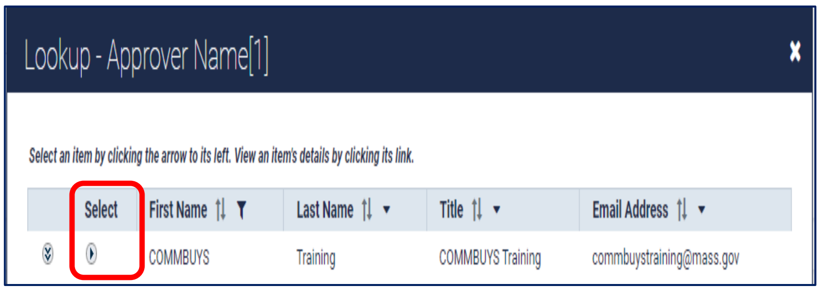
Screenshot	Directions



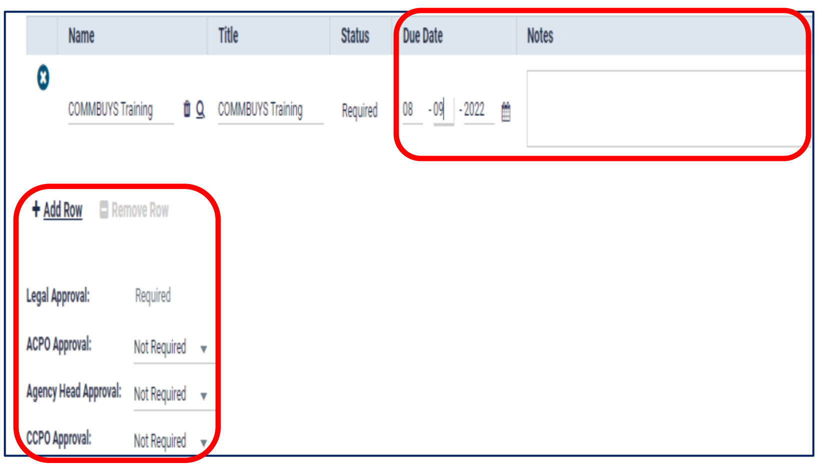
Step 22: Completing the Approvers Section

1. Ensure that **Serial** is selected from the dropdown menu in the **Approval Method** field.

2. Click on the **magnifying glass** search icon in the **Submitted For Approval By** field.



3. When the Lookup-Approver Name popup box displays, select the **right arrow** in the **Select** column next to the desired approver.



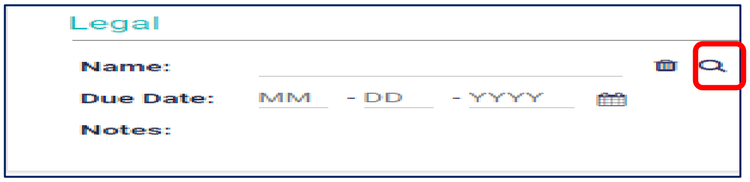
4. Enter the desired due date in the **Due Date** field.

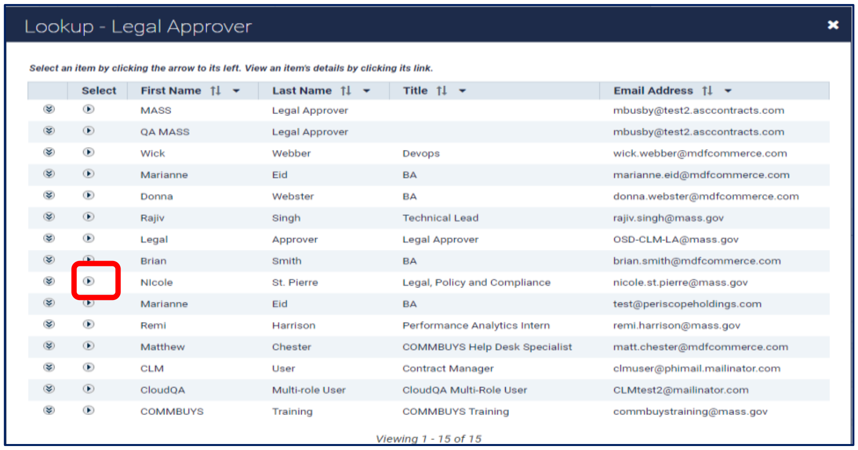
5. Enter notes, if desired, in the **Notes** text box.

6. Click on the **Add Row** hyperlink if you wish to add additional approvers.

   NOTE: No entries are required in the ACPO Approval, Agency Head Approval, and CCPO Approval fields.

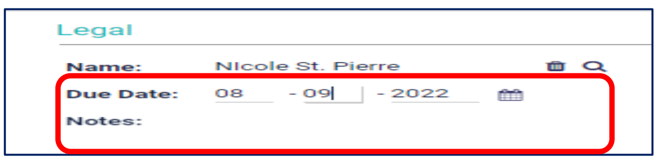
Screenshot	Directions





	Select	First Name	Last Name	Title	Email Address
		MASS	Legal Approver		mbusby@test2.asccontracts.com
		QA MASS	Legal Approver		mbusby@test2.asccontracts.com
		Wick	Webber	Devops	wick.webber@mdfcommerce.com
		Marianne	Eid	BA	marianne.eid@mdfcommerce.com
		Donna	Webster	BA	donna.webster@mdfcommerce.com
		Rajiv	Singh	Technical Lead	rajiv.singh@mass.gov
		Legal	Approver	Legal Approver	OSD-CLM-LA@mass.gov
		Brian	Smith	BA	brian.smith@mdfcommerce.com
		NIcole	St. Pierre	Legal, Policy and Compliance	nicole.st.pierre@mass.gov
		Marianne	Eid	BA	test@periscopeholdings.com
		Remi	Harrison	Performance Analytics Intern	remi.harrison@mass.gov
		Matthew	Chester	COMMBUYS Help Desk Specialist	matt.chester@mdfcommerce.com
		CLM	User	Contract Manager	clmuser@phimail.mailinator.com
		CloudQA	Multi-role User	CloudQA Multi-Role User	CLMtest2@mailinator.com
		COMMBUYS	Training	COMMBUYS Training	commbuystraining@mass.gov

Viewing 1 - 15 of 15



Step 23: Completing the Legal subsection

1. Click on the **magnifying glass** search icon.

2. When the Lookup – Legal Approver popup screen displays, select the **right arrow** in the Select column next to the name of the legal approver.

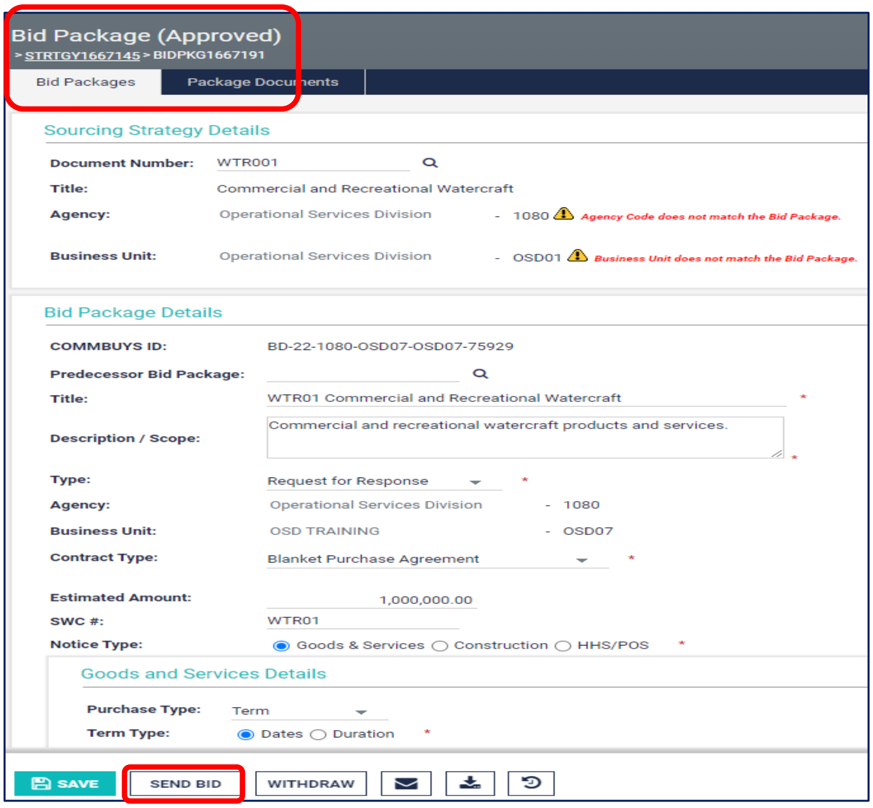
NOTE: If the name of the Legal Approver is left blank, the notice will be sent to all members of the Legal Approver group.

3. Enter the **desired due date** in the **Desired Due Date** field.

4. Click on the **SAVE** button at the bottom of the page.

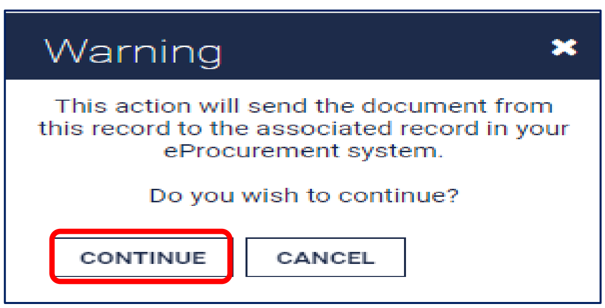
5. Click on the **SUBMIT FOR APPROVAL** button at the bottom of the page.

Screenshot	Directions

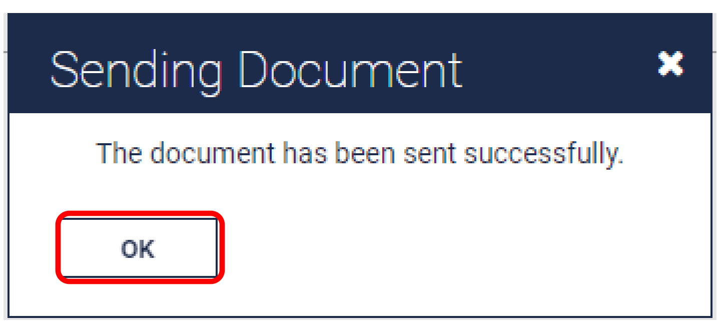


NOTE: The status changes to **Pending Approval.** After approval is received from the sourcing manager, the status changes to **Pending Legal Approval**. After legal approval, the status changes to **Approved**.

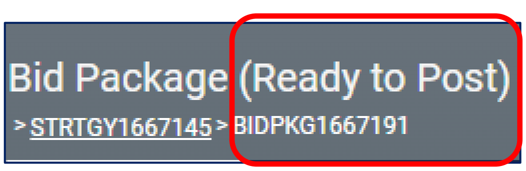
6. After legal approval is received, open the **BIDPKG** and click on the **SEND BID** button on the bottom of the page.



7. Click on the **Continue** button in the **Warning** popup screen, then



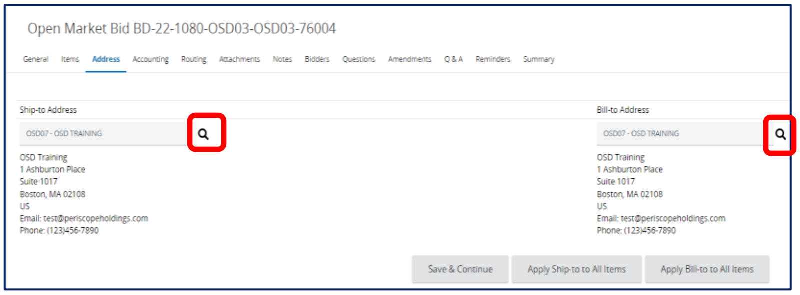
8. After the request is processed, click on the **OK** button in the **Sending Document** popup screen.



9. **NOTE:** The status changes to **Ready to Post.** No further action is required in CLM.

Now return to the bid in COMMBUYS.

Screenshot	Directions

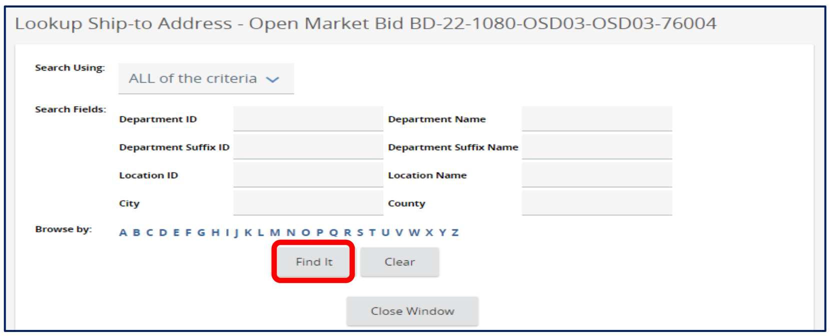


Step 24: Completing the COMMBUYS Address Tab

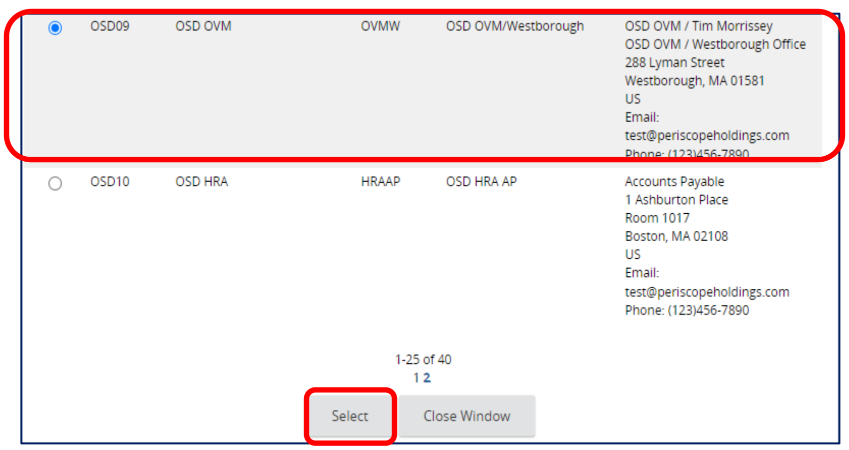
NOTE: The General and Items tab information carries over from the Notice of Intent phase. Changes may be made if needed. If the default Ship-to or Bill-to address do not need to be changed, go on to **Step 25.**

If changes need to be made to the default Ship-to or Bill-to address:

1. Click on the **magnifying glass** search icon.

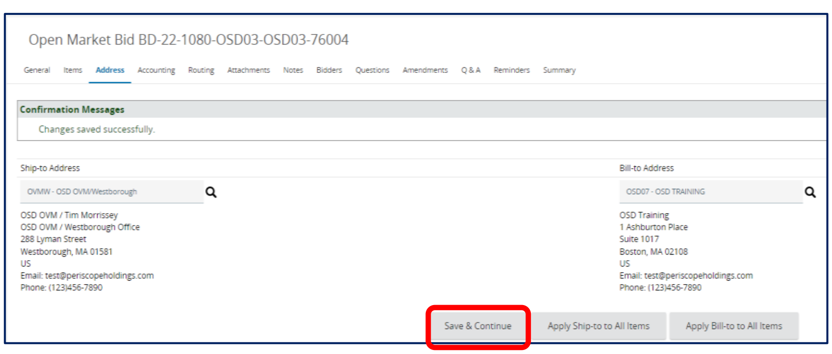


2. Click on the **Find It** button on the **Lookup Ship-to Address** popup screen.



3. Select the **radio button** in the **Select** column next to the desired address.

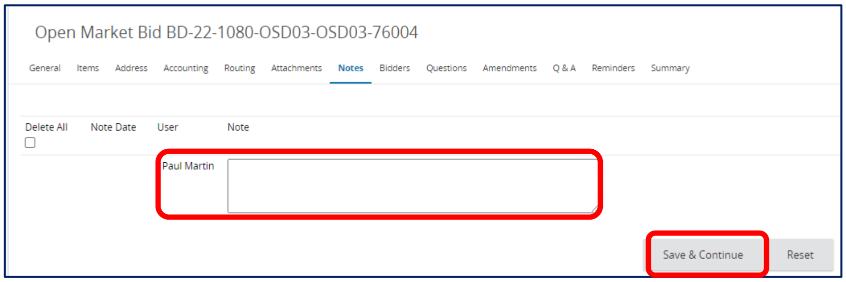
4. Click on the **Select** button at the Bottom of the page.



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

NOTE: The Accounting tab is not used. The Routing tab displays your approval path when submitting documents. The Attachments tab will contain any documents previously sent over from CLM (i.e. Letter of Intent; RFR).

Screenshot	Directions



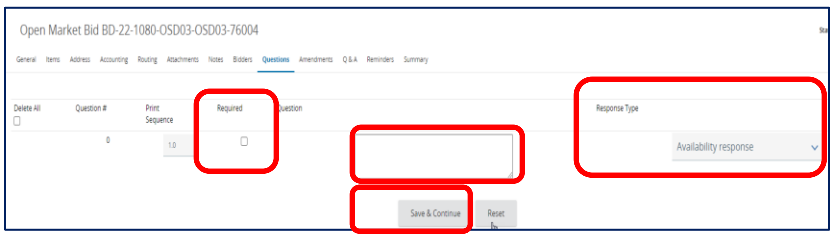
Step 25: Completing the Notes Tab

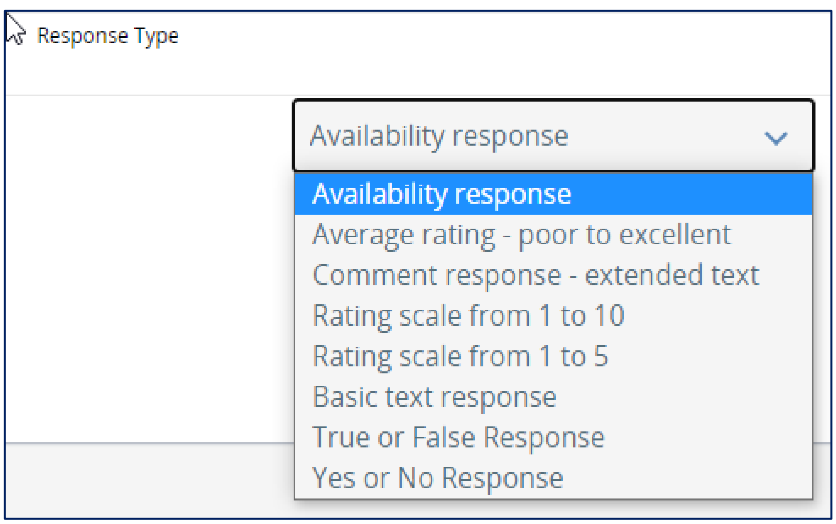
1. If desired, enter notes in the box in the **Note** column next to your Username.

2. When finished, click on the Save & Continue button.

NOTE: These notes can be seen by you and others assigned to your work group by your COMMBUYS Organization Administrator. Vendors cannot see these notes. However, please be aware that anything entered in the COMMBUYS system is subject to Freedom of Information Act (FOIA) requests from vendors, the media, and the public at large.

NOTE: The Bidders tab carries over from the Notice of Intent/RFR phase.





Step 26: Completing the Questions Tab

1. Select the **Required** checkbox if you would like to ask a question that vendors will be required to answer.

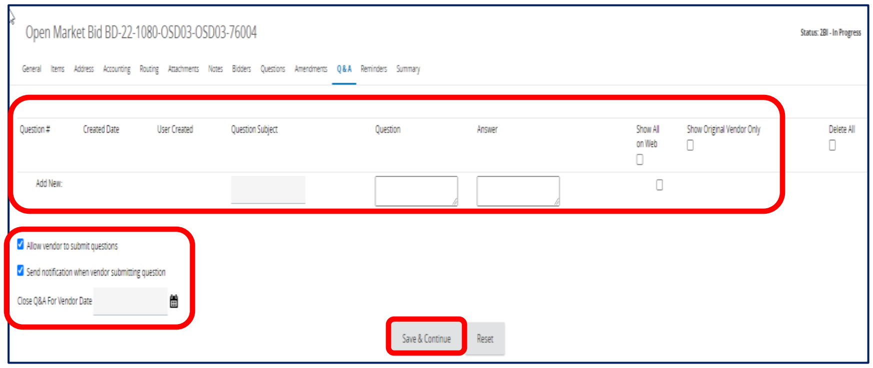
2. Enter your question in the **Question** box.

3. You can determine the length and type of vendor response by clicking on the down arrow next to the **Availability Response** field and choosing one of the menu options.

4. Click on the **Save & Continue** button when finished.

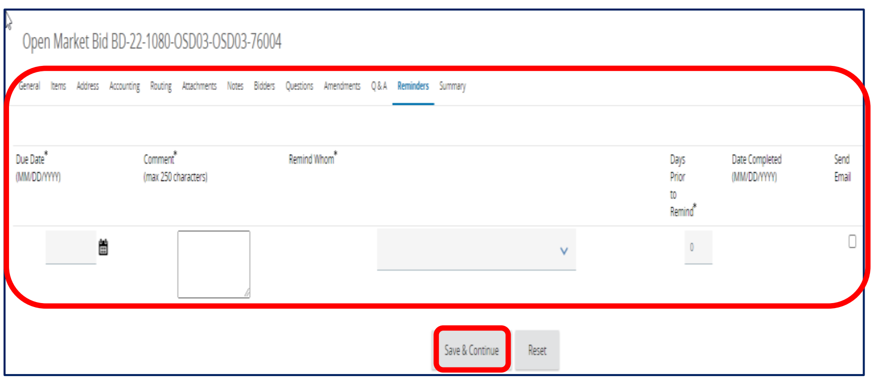
NOTE: At this point, skip over the **Amendments** tab and return to it in Step 29.

Screenshot	Directions



Step 27: Completing the Q&A Tab

1. Select the **Allow vendor to submit questions** checkbox.
2. Select the **Send notification when vendor submitting question** checkbox.
3. If desired, the question period allotted to vendors can be set using the **calendar icon** in the **Close Q&A For Vendor Date** field.
4. If a vendor submits a question, you can answer it using the **Answer** text box.
5. If you answer a question, select the **Show All on Web** checkbox and de-select the **Show Original Vendor Only** checkbox.
6. Click on the **Save & Continue** button.



Step 28: Completing the Reminders Tab

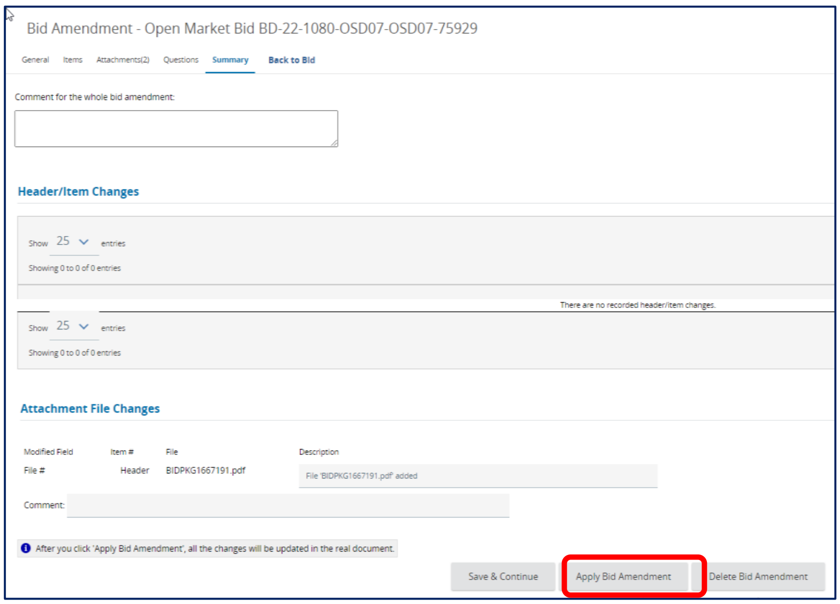
1. If you wish to set up an autogenerated email reminder from COMMBUYS CLM, click on the **calendar icon** next to **the Due Date** field and select the date the reminder should be sent.
2. Enter the text of the reminder in the **Comment** field.
3. Click on the **down arrow** next to the **Remind Whom** field to select the recipient of the reminder email, either you or someone else in your workgroup.
4. If you would like a pre-reminder, indicate the number of days in the **Days Prior to Remind** field.
5. Click on the **Send Email** checkbox.
6. Click on the **Save & Continue** button.

Screenshot	Directions

Step 29: Completing the Amendments Tab

NOTE: If you have issued a Notice of Intent and replaced it with an RFR, complete this step. Otherwise go to **Step 30.**

1. Click on the **View Amendment** button.

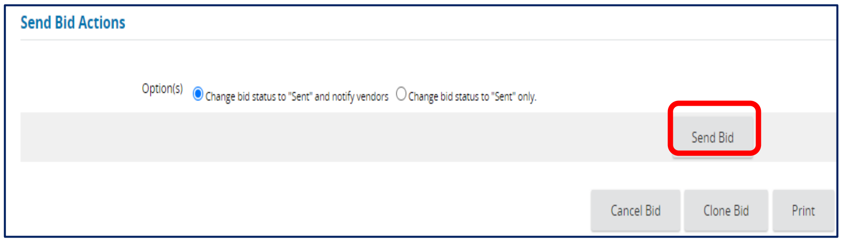


2. Click on the **Apply Bid Amendment** button.

3. Click on the **OK** button in the **Vendor Notification Result** popup screen.

NOTE: The RFR has now been sent to the vendors.

Screenshot	Directions



Step 30: Completing the Summary Tab

1. Click on the **Submit for Approval** button at the bottom of the page. Once approved, the status changes from **In Progress** to **Ready to Send.**

2. Scroll to the bottom of the page and click on the **Send Bid** button.

3. When the screen re-displays with a list of vendors, click on the **OK** button at the bottom. This changes the status to **Sent.**