

Job Aid:

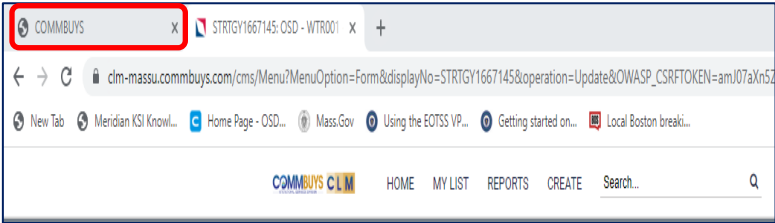

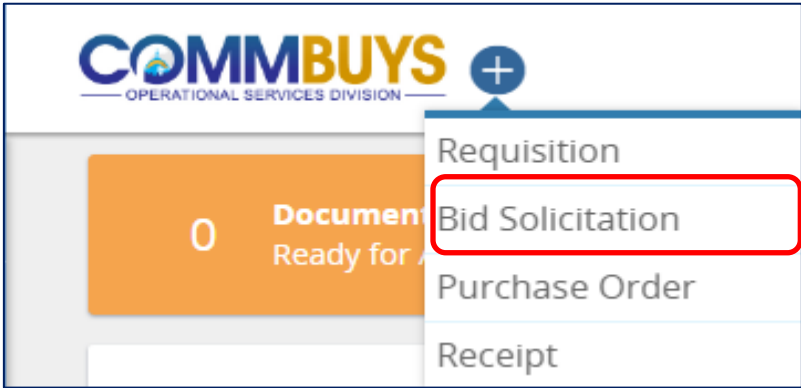
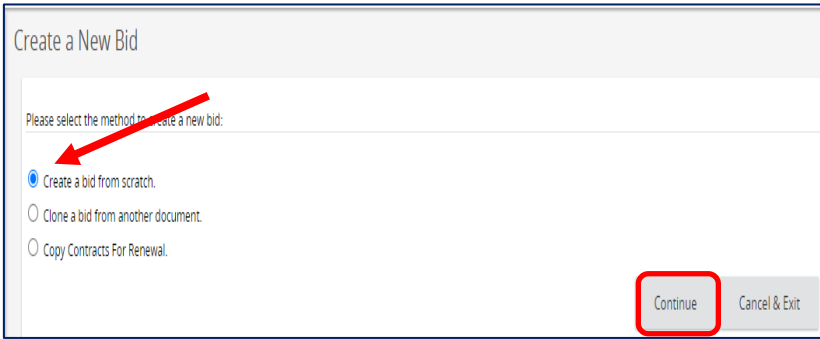
How to Create a Bid Package in COMMBUYS CLM

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
   	<p>Step 1: Initiating a bid in COMMBUYS CLM</p> <ol style="list-style-type: none"> 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.

The screenshot shows the 'General' tab of the COMMBUYS CLM system. The form contains various fields for bid creation. Red boxes highlight specific fields: 'Type Code' (NS - Non-Statewide Solicitation), 'Department' (OSD07 - OSD TRAINING), 'Location' (OSD07 - OSD TRAINING), 'Purchase*' (Martin, Paul), 'Available Date*' (07/06/2022 09:29:47 AM), 'Bid Type' (Open Bid), 'Informal Bid' (checkbox), and 'Purchase Method*' (Open Market).

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

SBPP (Small Business Purchasing Program) Eligible?*: NO

See SBPP requirements and exceptions at www.mass.gov/sbpp

Procurement Type*: World Trade Notification

CLM RFX ID:

Date Last Updated:

Save & Continue

SBPP (Small Business Purchasing Program) Eligible?*: NO

See SBPP requirements and exceptions at www.mass.gov/sbpp

Procurement Type*: World Trade Notification

CLM RFX ID:

Date Last Updated: 07/06/2022 10:33:44 AM

Create CLM RFX

Save & Continue

SBPP (Small Business Purchasing Program) Eligible?*: NO

See SBPP requirements and exceptions at www.mass.gov/sbpp

Procurement Type*: World Trade Notification

CLM RFX ID: BIDPKG1667191 View

Date Last Updated: 07/06/2022 10:12:37 AM

Save & Continue

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

Sourcing Strategy Details

Document Number: WTR001 







Title: Commercial and Recreational Watercraft

Agency: Operational Services Division 1080  Agency Code does not match the Bid Package.

Business Unit: Operational Services Division OSD01  Business Unit does not match the Bid Package.

Lookup - Document Number

Select an item by clicking the arrow to its left. View an item's details by clicking its link.

Select	Form Number	Document Number	Strategy Title	Sourcing Strategy Agency	Estimated Amount
	 STRTGY1645652	PINK001	Pink Legos	Operational Services Division	
	 STRTGY1645653	LEG101	Lego Bricks	Operational Services Division	
	 STRTGY1645654	ROC101	Rocket Engines	Operational Services Division	


Filter By : Strategy Title

Lookup - Document Number


Select an item by clicking the arrow to its left. View an item's details by clicking its link.


Select	Form Number	Document Number	Strategy Title	Sourcing Strategy Agency	Estimated Amount
	 STRTGY1666440	WTR100EP	SWC for Commercial and Recreational Water Craft	Operational Services Division	
	 STRTGY1667145	WTR001	Commercial and Recreational Watercraft	Operational Services Division	

Sourcing Strategy Details

Document Number: WTR001 

Title: Commercial and Recreational Watercraft

Agency: Operational Services Division 1080  Agency Code does not match the Bid Package.

Business Unit: Operational Services Division OSD01  Business Unit does not match the Bid Package.

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

Bid Package Details

COMMBUYS ID: BD-22-1080-OSD07-OSD07-75929

Predecessor Bid Package:

Title: WTR01 Commercial and Recreational Watercraft

Description / Scope: Commercial and recreational watercraft products and services.

Type: **(*)** *WTO*

Agency: Operational Services Division - 1080

Business Unit: OSD TRAINING - OSD07

Contract Type: Blanket Purchase Agreement

Estimated Amount: 1,000,000.00

SWC #: WT001

Notice Type: ☒ Goods & Services ☐ Construction ☐ HHS/POS *

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.

Goods and Services Details

Purchase Type: Select Option

Select Option

Term

One Time

Goods and Services Details

Purchase Type: Term

Term Type: ☒ Dates ☐ Duration *

Term Start Date: MM - DD - YYYY


Term End Date: MM - DD - YYYY

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.

Bid Package Dates

Planned Contract Start Date: 12 - 29 - 2023 * 

Timeline

Intent to Procure Date:	08	- 17	- 2023		
Issue Date:	08	- 24	- 2023		
Pre-Bid Conference Date:	09	- 06	- 2023		
Questions Acceptance Deadline:	09	- 10	- 2023		
Questions Answered Date:	09	- 12	- 2023		
Bid Amendment Deadline:	09	- 17	- 2023		
Online Bid Submission Training:	10	- 02	- 2023		
Closing Date:	10	- 22	- 2023		
Presentation for Selected Bidder(s):	MM	- DD	- YYYY		
Announcement of Awarded Bidder(s):	12	- 07	- 2023	*	
Final Negotiation Date:	MM	- DD	- YYYY		
Completion of Online Catalogs:	MM	- DD	- YYYY		

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**.



Statewide Contract Dates

Effective Date: 12 - 29 - 2023 * 

Initial End Date: MM - DD - YYYY 

Renewal: None ▼

Renewal: Options ▼

Option Period	Duration (months)	Start Date	End Date
1		MM - DD - YYYY 	MM - DD - YYYY 

[+ Add Row](#) [Remove Row](#)

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.

Contract Categories

Contract Categories: Products and Services ▼

		Name
1	✕	Commercial Watercraft
2	✕	Recreational Watercraft

+ Add Row **- Remove Row**

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

Contacts

Requestor: _____

Sourcing Manager: _____ *Field is mandatory 

Lookup - Sourcing Manager ✕

Select an item by clicking the arrow to its left. View an item's details by clicking its link.

Select	First Name ↑↓ 	Last Name ↑↓	Email Address ↑↓
			

Filter By : First Name

OK **CANCEL**

Lookup - Sourcing Manager ✕

Select an item by clicking the arrow to its left. View an item's details by clicking its link.

Select	First Name ↑↓ 	Last Name ↑↓	Email Address ↑↓
	Paul	Martin	paul.g.martin@mass.gov

Contacts

Requestor: _____

Sourcing Manager: **Paul Martin** *Field is mandatory. 

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 redisplay, 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.

RFR Document

Working Document

Document: [BIDPKG1667191 \(Template\)](#) [View PDF](#) [Upload Document](#)

Data Injection: ☒ YES

Comments:

edit, it's safer to stay in Protected View. [Enable Editing](#)

OSD
OPERATIONAL SERVICES DIVISION
Gary J. Lambert
Assistant Secretary for Operational Services

The Commonwealth of Massachusetts
Executive Office for Administration and Finance
Operational Services Division
Charles D. Baker, Governor
Karyn E. Polito, Lieutenant Governor
Michael J. Heffernan, Secretary

Notice of Intent to Bid – [August 24, 2023]
[WTR01 Commercial and Recreational Watercraft]
This is an announcement only.

This is a World Trade Organization (WTO) announcement only! Please do NOT contact the issuer with questions about the anticipated bid. Bidders are solely responsible to monitor COMMBUYS.com for amendments to this announcement and for complete bid posting.

The Commonwealth of Massachusetts through the Operational Services Division (OSD) intends to post a solicitation for a new contract, [WTR01 Commercial and Recreational Watercraft], and to require bid submission via COMMBUYS. This will replace the current contracts.

Before the solicitation is posted, interested bidders should also take advantage of educational opportunities offered through Operational Services Division on the bidding process.

1. [Operational Services Division Homepage](#)
2. [OSD Training & Outreach Courses](#)
3. [Supplier Diversity Office \(SDO\)](#)
4. [Supplier Diversity Program \(SDP\)](#)
5. [Environmentally Preferable Products \(EPP\)](#)

COMMBUYS UNSPSC CODES:	COMMBUYS UNSPSC CODE DESCRIPTIONS:
12-14-20-05	Helium gas
15-11-15-06	Acetylene
25-11-19	Marine Craft Systems and Subassemblies

RFR Document

Working Document

Document: [WTR01_BIDPKG1667191 \(Template\)](#) [View PDF](#) [Upload Document](#)

RFR Document

Working Document

Document: [WTR01_BIDPKG1667191_v1.docx](#) [Replace](#) [Remove](#)

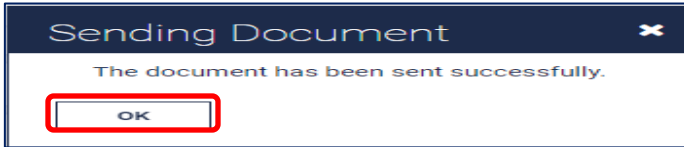
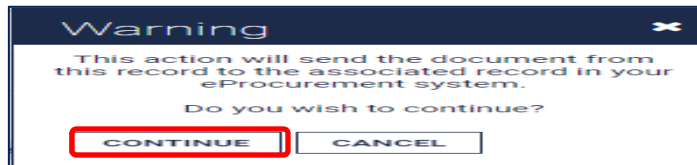
Data Injection: ☒ YES

Comments:

[SAVE](#) [SEND LETTER OF INTENT](#) [WITHDRAW](#) [COMPLETE](#) [✉](#) [↓](#) [↺](#)

Screenshot

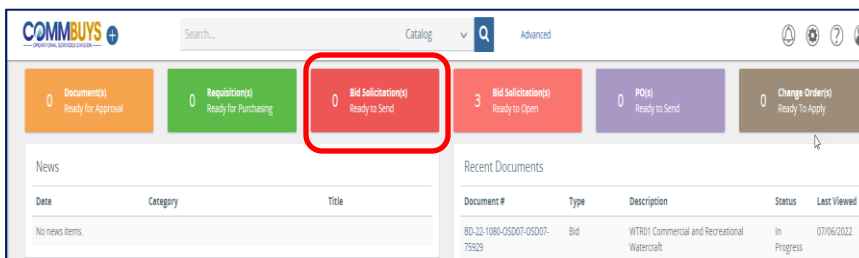
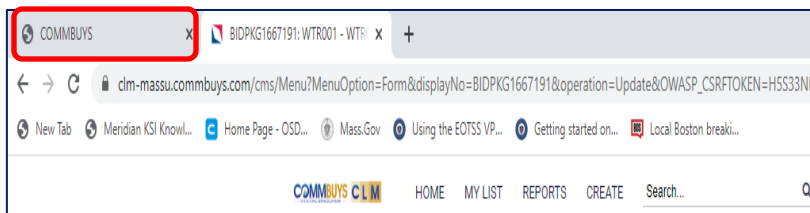
Directions



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

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

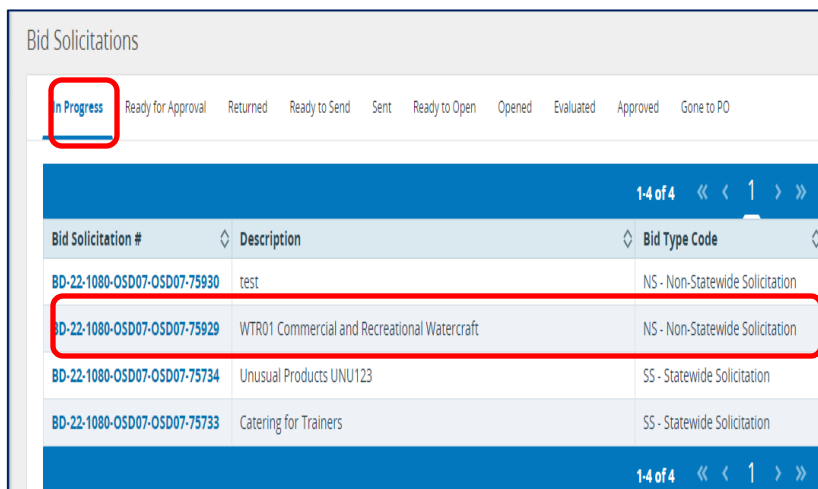
NOTE: At this point, you will return to **COMMBUYS** to reopen the bid.



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.

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-Family** 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.

Open Market Bid BD-22-1080-OSD07-OSD07-75929

General **Items** Address Accounting Routing Attachments(1) Notes Bidders Questions Amendments Q & A Reminders Summary

Overall Validation Errors

No Items.

Open Market Bid BD-22-1080-OSD07-OSD07-75929

General **Items** Address Accounting Routing Attachments(1) Notes Bidders Questions Amendments Q & A Reminders Summary

General Address Accounting Attachments Notes Questions

There are no items. Please click "Search Items" or "Add Item" below to add an item.

Search Items **Add Item** Upload Items Export Items

Open Market Bid BD-22-1080-OSD07-OSD07-75929

General **Items** Address Accounting Routing Attachments(1) Notes Bidders Questions Amendments Q & A Reminders Summary

General Address Accounting Attachments Notes Questions

Item #: Item Type: Normal

Print Sequence: 1.0 Item Status: 281 - In Progress

Description: Commercial watercraft products and services.

Disable Pricing On Quote: ☒ Quantity: 0.0 Unit Cost: 0.00 Net Unit Cost: \$0.00 UOM: EA

UNSPSC Segment-Family: 25-11 25-11 - Marine transport

UNSPSC Class: 15 15 - Commercial marine craft

Commodity-EPP:

Additional product information

Save & Add New Save & Exit Save & Continue Reset Cancel & Exit

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**.

Open Market Bid BD-22-1080-OSD07-OSD07-75929

General **Items** Address Accounting Routing Attachments(1) Notes **Bidders** Questions Amendments Q & A Reminders Summary

General Address Accounting Attachments Notes Questions

Open Market Bid BD-22-1080-OSD07-OSD07-75929

General Subcontractors Quote Activity

Vendor Validation Warnings
No bid bidder.

Select bidder participation, open or closed, and select vendors to notify

☐ Unrestricted bid, all vendors can view and respond
☐ Restricted bid, only selected vendors can view and respond

Vendor ID Vendor Name Vendor Address

☐ Show Estimated Total To Vendors
☐ Show Unit Prices to Vendors
☒ Hide Bid Holder List on Vendor Side

Before you look up bid vendors or add a new vendor, please save your unsaved changes. Otherwise you will lose those changes.

Save & Continue **Lookup & Add Vendors**

COMMBUYS | UAT - Lookup Vendors - Google Chrome

test.commbuys.com/bso/bid/lookupBidVendors.sdo?external=true&docId=BD-22-1080-OSD07-OSD07-75929&parentUrl=%2Fbso%2Fbid%2FbidBidd...

DUNS Number Business Enterprise (for profit) Non-Profit Organization
This is the DUNS number assigned to my Business

Environmentally Preferable Product No Yes

Geographical Service Area in Massachusetts Western Massachusetts Central Massachusetts

Prompt Pay Discount No Yes

Supplier Diversity and Small Business Status Disability-Owned Business Enterprise (DOBE) L.G.B.T.-owned Business Enterprise (L.G.B.T.OE)

Program ☐ Small Business Purchasing Program

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9 10

Find It Clear

Find Vendors for All Commodity-EPPs on the Bid Close Window

Lookup & Add Reference Vendors - Bid BD-22-1080-OSD07-OSD07-75929

Vendor Lookup

Select

Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date
<input type="checkbox"/>	00039150	All American Marine, Inc.			Jun 19, 2019
<input type="checkbox"/>	00012129	Apollo Fishing LLC			May 28, 2015
<input type="checkbox"/>	00049894	Armstrong Consolidated LLC			
<input type="checkbox"/>	00012981	Armstrong Marine, Inc.			
<input type="checkbox"/>	00048227	Artisan Boatworks		Jun 28, 2022	Jun 28, 2022
<input type="checkbox"/>	00002105	ATLANTIC BOATS INC		Jun 28, 2022	Jun 27, 2022

www.test.commbuys.com says

Warning: All vendors have been selected for email notification. A large quantity of vendors may take several minutes to process.

OK

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.

Item #2: Recreational watercraft products and services 2BI - In Progress

UNSPSC Code: 25-11-18
Recreational watercraft

Disable Pricing On Quote	Qty	Unit Cost	UOM	Total Discount Amt.
Yes	1.0	\$0.00	EA - Each	

Manufacturer: Brand: Model:
Make: Packaging:
Product Length: Product Width: Product Height:
UPC/ISBN: SKU:
Tags: URL:

Account Code

There is no item accounting available for this item.

Submit for Approval Cancel Bid Clone Bid Print

COMMBUYS+ Search... Catalog

0 Document(s) Ready for Approval

0 Requisition(s) Ready for Purchasing

1 Bid Solicitation(s) Ready to Send

Bid Solicitations

In Progress Ready for Approval Returned Ready to Send Sent Ready to Open Opened Evaluated

Bid Solicitation #	Description
BD-22-1080-OSD07-OSD07-75929	WTR01 Commercial and Recreational Watercraft

Send Bid Actions

Option(s) ☒ Change bid status to "Sent" and notify vendors ☐ Change bid status to "Sent" only.

Send Bid

Cancel Bid Clone Bid Print

00048227	Artisan Boatworks	Alec Brainerd (test@periscopeholdings.com)
00002651	Smith Marine, Inc.	Matthew Plauche (test@periscopeholdings.com)
00039273	Metal Shark Franklin, dba Metal Shark	Leigh Noel (test@periscopeholdings.com)
00049894	Armstrong Consolidated LLC	Alasun Schreengost (test@periscopeholdings.com)
00052676	Inshore Boat Shop, Inc.	Valerie Knott (test@periscopeholdings.com)
00010723	Niemiec Marine, Inc.	Bradford Niemiec (test@periscopeholdings.com)
00003642	CODE ALPHA DIVERS, LLC	STEVE CASSIDY (test@periscopeholdings.com)

OK

Bid Package Details

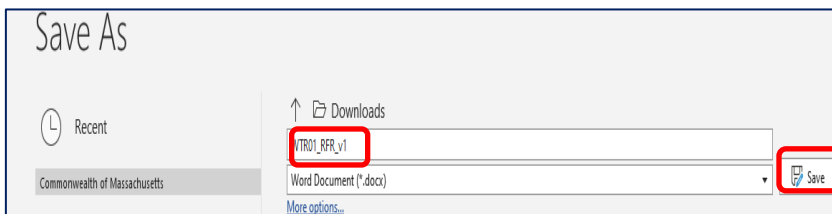
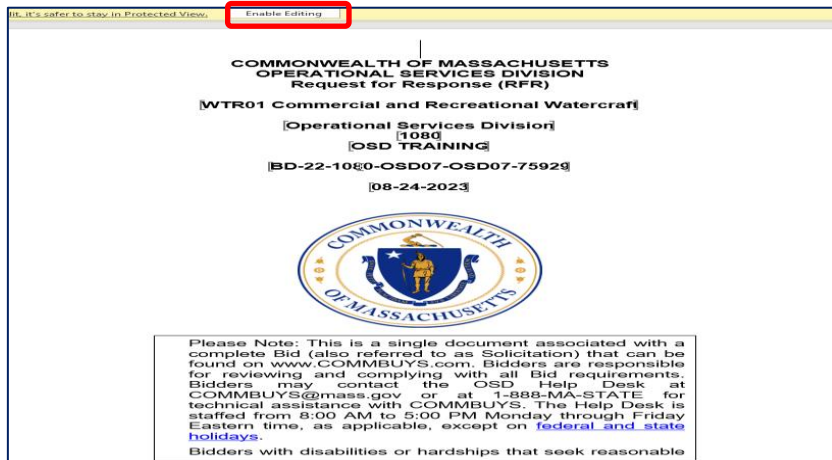
COMMBUYS ID:	BD-22-1080-OSD07-OSD07-75929		
Predecessor Bid Package:	<input type="text"/> Q		
Title:	WTR01 Commercial and Recreational Watercraft *		
Description / Scope:	<div>Commercial and recreational watercraft products and services.</div> *		
Type:	**(*)** ▼ * WTO *		
Agency:	Operational Services Division - 1080		
Business Unit:	OSD TRAINING - OSD07		
Contract Type:	Blanket Purchase Agreement ▼ *		
Estimated Amount:	1,000,000.00		
SWC #:	WTR01		
Notice Type:	<input checked="" type="radio"/> Goods & Services <input type="radio"/> Construction <input type="radio"/> HHS/POS *		

Step 15: Completing the Bid Package Details Section

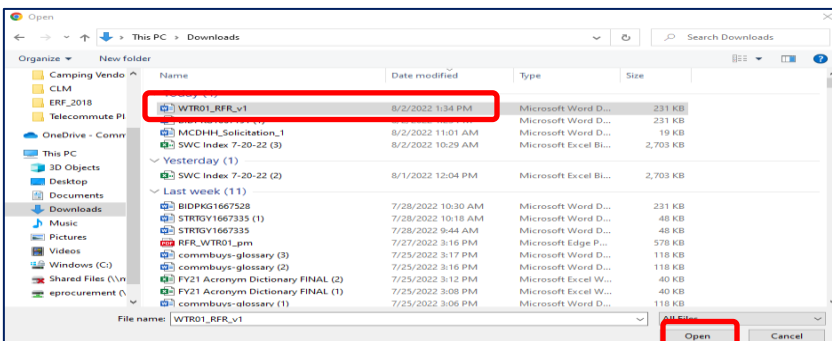
1. Click on the down arrow in the **Type** field containing the asterisks and select **Request for Response** from the dropdown menu.
2. Click on the **SAVE** button at the bottom of the page.

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.

Working Document Collaboration

Status: **Not Started** [EDIT](#) [SHARE](#) [?](#)

Due Date: MM - DD - YYYY [Comments:](#)

Send Reminders: YES ☒ [?](#)

External User	Name	Email	Permission ?	Status
	<input type="text"/>	<input type="text"/>	Select Option v	Not Started v

[+ Add Row](#) [Remove Row](#)

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**.

Working Document Collaboration

Status: Not Started [EDIT](#) [SHARE](#) ?

Due Date: MM - DD - YYYY [Comments](#)

Send Reminders: YES ☒ ?

External User	Name	Email	Permission ?	Status
	<input type="text"/>	<input type="text"/>	Select Option ▼	Not Started ▼

[+ Add Row](#) [Remove Row](#)

Permission ?

Select Option ▼

- Select Option
- Edit
- Comment
- Read Only

Status

Not Started ▼

- Not Started
- Shared
- Completed
- Not Completed

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.

Name	Title	Status	Due Date	Notes
<div>  <input type="text"/> </div>		Not Required	MM - DD - YYYY	

Lookup - Collaborator Name[1]
✕

Select an item by clicking the arrow to its left. View an item's details by clicking its link.


Select	Form Number	Full Name	Email Address

Filter By : Full Name

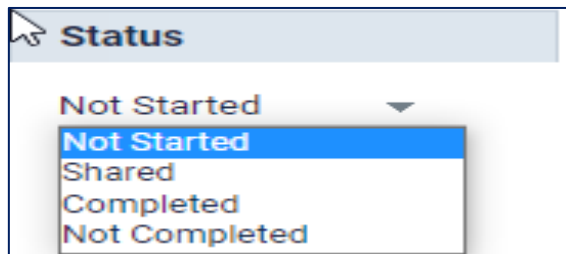
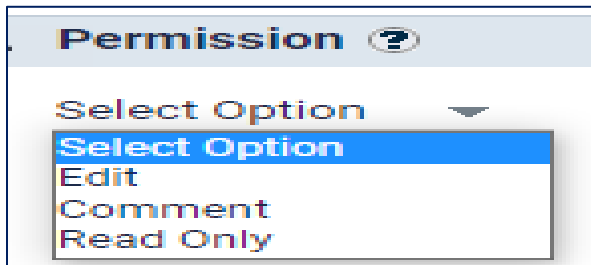
Lookup - Collaborator Name[1]
✕

Select an item by clicking the arrow to its left. View an item's details by clicking its link.

Select	Form Number	Full Name	Email Address
<div>  </div>	USER1645611	Renee O'Rourke	renee.orourke@mass.gov

External User	Name	Email	Permission ?	Status
<div>  </div>	Renee O'Rourke	renee.orourke@mass.gov	Select Option	Not Started

[+ Add Row](#)
[Remove Row](#)



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.

Step 20: Starting the Collaboration Process

1. Click on the **EDIT** button. When you do, your name is added to the list of collaborators.

Working Document Collaboration

Status: Not Started **EDIT** **SHARE** ?

Due Date: MM - DD - YYYY Comments:

Send Reminders: YES ☒ ?

External User	Name	Email	Permission ?	Status
<input type="checkbox"/>			Select Option	Not Started

+ Add Row Remove Row

Tasks

0 Tasks **New Task**

Type task here. You can highlight a text area in the document to link to your task.

Assigned To: Renee O'Rourke

Create Task Cancel

Tasks

1 Tasks **New Task**

Status Assignee

To: Renee O'Rourke / By: Paul Martin
4/29/2022 11:28 AM
Assigned
Task: Please edit.

Add Reply

COMPLETE REVIEW **SHARE DOCUMENT** **GO TO RECORD**

Working Document Collaboration

Status: Draft **EDIT** **SHARE** ☒ COMPLETE ☒ CANCEL ?

Due Date: 06 - 29 - 2022 Comments:

Send Reminders: YES ☒ ?

External User	Name	Email	Permission ?	Status
<input checked="" type="checkbox"/>	Renee O'Rourke	renee.orourke@mass.gov	Edit	Not Started
<input checked="" type="checkbox"/>	Paul Martin	paul.g.martin@mass.gov	Owner	Not Started

+ Add Row Remove Row

2. Click on the **New Task** button on the left side of the page.
3. When the New Task section redisplay, 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

Working Document Collaboration

Status: Shared EDIT REPLACE WORKING DOCUMENT **COMPLETE** CANCEL NOTIFY SHARED COLLABORATORS

Due Date: 06 - 29 - 2022 Comments:

Send Reminders: YES ?

2 collaborators | 0 currently online

External User	Name	Email	Permission ?	Status
	Renee O'Rourke	renee.orourke@mass.gov	Edit	Shared
	Paul Martin	paul.g.martin@mass.gov	Owner	Shared

+ Add Row Remove Row

Completing Collaboration ✕

If the document contains redlines and/or comments, they will be retained in the working document if they are not resolved.

OK CANCEL

Working Document Collaboration

Status: **Completed** EDIT SHARE ?

Due Date: 06 - 29 - 2022 Comments:

Send Reminders: YES ?

External User	Name	Email	Permission ?	Status
	Renee O'Rourke	renee.orourke@mass.gov	Edit	Completed
	Paul Martin	paul.g.martin@mass.gov	Owner	Completed

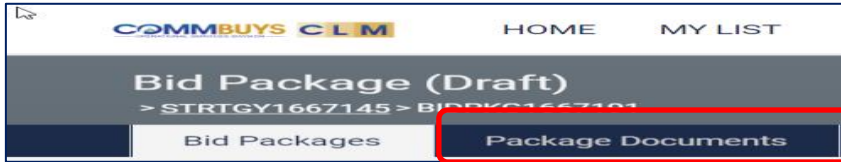
+ Add Row Remove Row

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

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

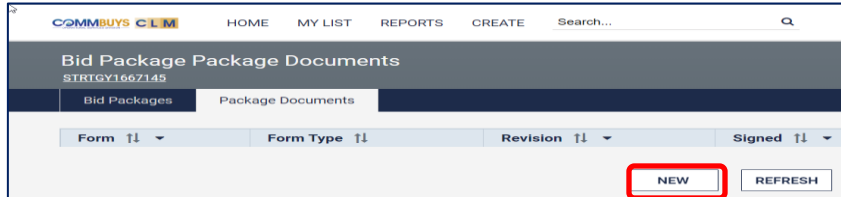
NOTE: It is important to ensure that redlines and comments are resolved at this stage in the process.

- The status changes to **Completed**.

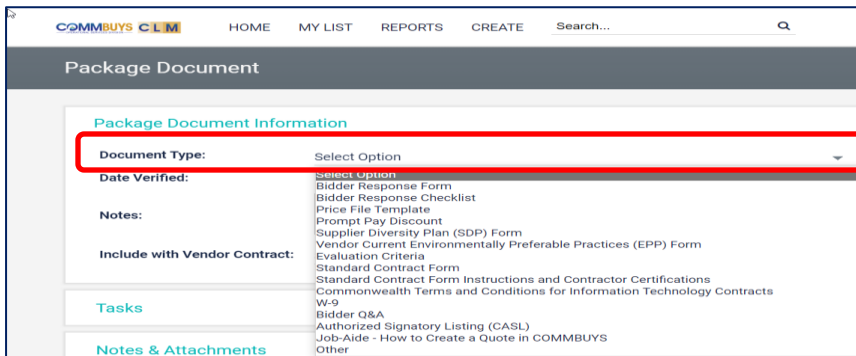


Step 21: Accessing the Package Documents Tab

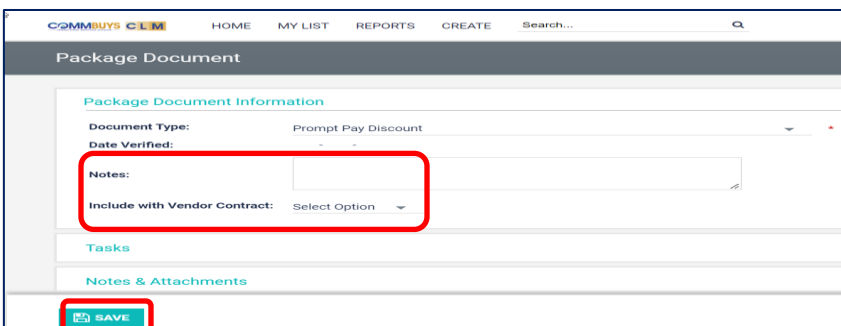
1. Click on the **Package Documents** tab near the top of the page.



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

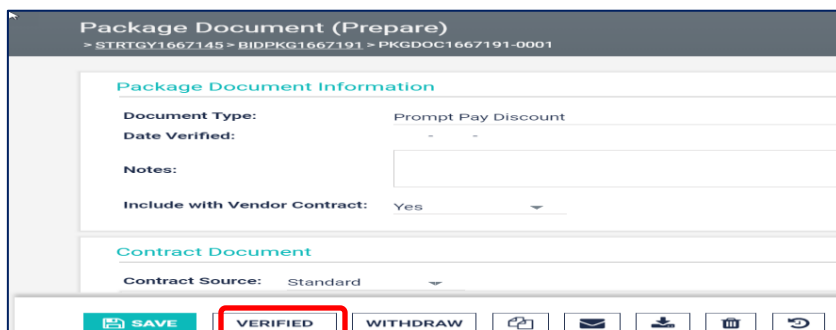


3. In the Document Type field, click on the down arrow next to Select Option, and select the desired document.

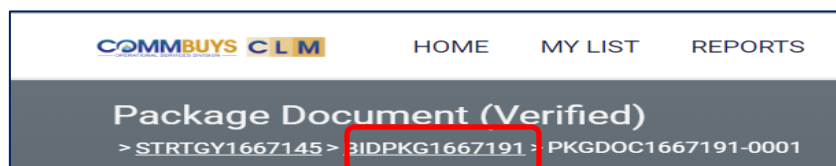


4. Add notes if desired.
5. Click on the down arrow next to the **Include with Vendor Contract** field and select **Yes** from the dropdown menu.

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.

Approvers

Approval Method: Serial ▼

Submitted For Approval By:

Name	Title	Status	Due Date	Notes
+		Not Required	MM - DD - YYYY	

+ Add Row Remove Row

Legal Approval: Required

ACPO Approval: Not Required ▼

Agency Head Approval: Not Required ▼

Lookup - Approver Name[1]

Select an item by clicking the arrow to its left. View an item's details by clicking its link.

Select	First Name ↑↓	Last Name ↑↓	Title ↑↓	Email Address ↑↓
▶	COMMBUYS	Training	COMMBUYS Training	commbuys training@mass.gov

Name	Title	Status	Due Date	Notes
+	COMMBUYS Training	Required	08 - 09 - 2022	

+ Add Row Remove Row

Legal Approval: Required

ACPO Approval: Not Required ▼

Agency Head Approval: Not Required ▼

CCPO Approval: Not Required ▼

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

Legal
















Name: _____ 

Due Date: MM - DD - YYYY 

Notes:


Lookup - Legal Approver


Select an item by clicking the arrow to its left. View an item's details by clicking its link.

Select	First Name	Last Name	Title	Email Address
	MASS	Legal Approver		mbusby@test2.ascontracts.com
	QA MASS	Legal Approver		mbusby@test2.ascontracts.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.mallinator.com
	CloudQA	Multi-role User	CloudQA Multi-Role User	CLMtest2@mailinator.com
	COMMBUYS	Training	COMMBUYS Training	commbuystraining@mass.gov

Viewing 1 - 15 of 15

Legal

Name: Nicole St. Pierre 

Due Date: 08 - 09 - 2022 

Notes:

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

Bid Package (Approved)
 > STRTGY1667145 > BIDPKG1667191

Bid Packages Package Documents

Sourcing Strategy Details

Document Number: WTR001

Title: Commercial and Recreational Watercraft

Agency: Operational Services Division - 1080 ⚠ Agency Code does not match the Bid Package.

Business Unit: Operational Services Division - OSD01 ⚠ Business Unit does not match the Bid Package.

Bid Package Details

COMMBUYS ID: BD-22-1080-OSD07-OSD07-75929

Predecessor Bid Package: WTR01 Commercial and Recreational Watercraft

Title: Commercial and recreational watercraft products and services.

Description / Scope:

Type: Request for Response

Agency: Operational Services Division - 1080

Business Unit: OSD TRAINING - OSD07

Contract Type: Blanket Purchase Agreement

Estimated Amount: 1,000,000.00

SWC #: WTR01

Notice Type: ☒ Goods & Services ☐ Construction ☐ HHS/POS

Goods and Services Details

Purchase Type: Term

Term Type: ☒ Dates ☐ Duration

SAVE SEND BID WITHDRAW

Warning

This action will send the document from this record to the associated record in your eProcurement system.

Do you wish to continue?

CONTINUE CANCEL

Sending Document

The document has been sent successfully.

OK

Bid Package (Ready to Post)
 > STRTGY1667145 > BIDPKG1667191

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**.

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

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

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

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

Now return to the bid in **COMMBUYS**.

Open Market Bid BD-22-1080-OSD03-OSD03-76004

General Items **Address** Accounting Routing Attachments Notes Bidders Questions Amendments Q & A Reminders Summary

Ship-to Address Q Bill-to Address Q

OSD07 - OSD TRAINING

OSD Training
1 Ashburton Place
Suite 1017
Boston, MA 02108
US
Email: test@periscopeholdings.com
Phone: (123)456-7890

OSD07 - OSD TRAINING

OSD Training
1 Ashburton Place
Suite 1017
Boston, MA 02108
US
Email: test@periscopeholdings.com
Phone: (123)456-7890

Save & Continue Apply Ship-to to All Items Apply Bill-to to All Items

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.

Lookup Ship-to Address - Open Market Bid BD-22-1080-OSD03-OSD03-76004

Search Using: ALL of the criteria

Search Fields:

Department ID	Department Name
Department Suffix ID	Department Suffix Name
Location ID	Location Name
City	County

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Find It Clear

Close Window

<input checked="" type="radio"/>	OSD09	OSD OVM	OVW	OSD OVM/Westborough	OSD OVM / Tim Morrissey OSD OVM / Westborough Office 288 Lyman Street Westborough, MA 01581 US Email: test@periscopeholdings.com Phone: (123)456-7890
<input type="radio"/>	OSD10	OSD HRA	HRAAP	OSD HRA AP	Accounts Payable 1 Ashburton Place Room 1017 Boston, MA 02108 US Email: test@periscopeholdings.com Phone: (123)456-7890

1-25 of 40
1 2

Select Close Window

Open Market Bid BD-22-1080-OSD03-OSD03-76004

General Items **Address** Accounting Routing Attachments Notes Bidders Questions Amendments Q & A Reminders Summary

Confirmation Messages
Changes saved successfully.

Ship-to Address Q Bill-to Address Q

OVW - OSD OVM/Westborough

OSD OVM / Tim Morrissey
OSD OVM / Westborough Office
288 Lyman Street
Westborough, MA 01581
US
Email: test@periscopeholdings.com
Phone: (123)456-7890

OSD07 - OSD TRAINING

OSD Training
1 Ashburton Place
Suite 1017
Boston, MA 02108
US
Email: test@periscopeholdings.com
Phone: (123)456-7890

Save & Continue Apply Ship-to to All Items Apply Bill-to to All Items

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

Open Market Bid BD-22-1080-OSD03-OSD03-76004

General Items Address Accounting Routing Attachments **Notes** Bidders Questions Amendments Q & A Reminders Summary

Delete All	Note Date	User	Note
<input type="checkbox"/>		Paul Martin	

Save & Continue Reset

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.

Open Market Bid BD-22-1080-OSD03-OSD03-76004

General Items Address Accounting Routing Attachments Notes Bidders **Questions** Amendments Q & A Reminders Summary

Delete All	Question #	Print Sequence	Required	Question	Response Type
<input type="checkbox"/>	0	10	<input type="checkbox"/>		Availability response

Save & Continue Reset

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.

Response Type

Availability response

Availability response

Average rating - poor to excellent

Comment response - extended text

Rating scale from 1 to 10

Rating scale from 1 to 5

Basic text response

True or False Response

Yes or No Response

Screenshot

Directions

Open Market Bid BD-22-1080-OSD03-OSD03-76004

General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments **Q&A** Reminders Summary

Question #	Created Date	User Created	Question Subject	Question	Answer	Show All on Web	Show Original Vendor Only	Delete All
Add New:								

☒ Allow vendor to submit questions
☒ Send notification when vendor submitting question

Close Q&A For Vendor Date

Save & Continue **Reset**

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.

Open Market Bid BD-22-1080-OSD03-OSD03-76004

General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments Q&A **Reminders** Summary

Due Date*	Comment*	Remind Whom*	Days Prior to Remind*	Date Completed	Send Email
(MM/DD/YYYY)	(max 250 characters)			(MM/DD/YYYY)	<input type="checkbox"/>

☐

Save & Continue **Reset**

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.

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.

Open Market Bid BD-22-1080-OSD07-75929

General Items Address Accounting Routing Attachments(1) Notes Bidders Questions **Amendments(1)** Q & A Reminders Summary

Bid Amendment #	Status	Vendor Bid Amendment Sequence #	Comment	Posted Date
1	In Progress	For Internal Only		

[View Bid Amendment](#)

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

Bid Amendment - Open Market Bid BD-22-1080-OSD07-75929

General Items Attachments(2) Questions **Summary** [Back to Bid](#)

Comment for the whole bid amendment:

[Header/Item Changes](#)

Show 25 entries
Showing 0 to 0 of 0 entries

There are no recorded header/item changes.

[Attachment File Changes](#)

Modified Field	Item #	File	Description
File #	Header	BIDPKG1667191.pdf	File 'BIDPKG1667191.pdf' added

Comment:

i After you click 'Apply Bid Amendment', all the changes will be updated in the real document.

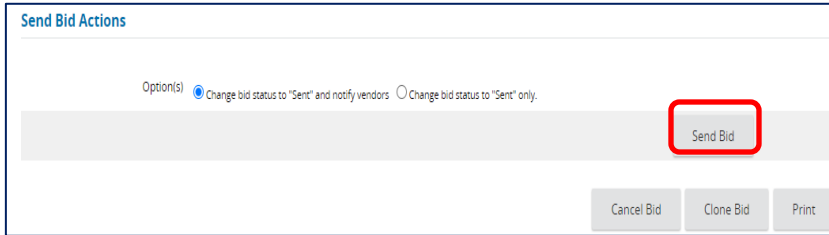
[Save & Continue](#) [Apply Bid Amendment](#) [Delete Bid Amendment](#)

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

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

00023166	The Boat Guy, Inc.	andy bancroft (test@perscopeholdings.com)
00042024	Security Boston International, LLC	Daniel Magoon (test@perscopeholdings.com)
00014399	Eastern Harbor Service Inc	Tim Wilson (test@perscopeholdings.com)
00014863	Elite Textile Trading LLC	Cindy Hua (test@perscopeholdings.com)
00030581	Hotz Consulting Group LLC	John Hotz (test@perscopeholdings.com)
00033693	Portable Computer Systems, Inc. dba Route1	Brian Ferring (test@perscopeholdings.com)
00012129	Apollo Fishing LLC	Stephanie Rafael-DelHelle (test@perscopeholdings.com)
00023463	M&G Harbor Services LLC	Michael McDonough (test@perscopeholdings.com)
00039303	Vigor Kivichak LLC	Ross Hendrick (test@perscopeholdings.com)
00048192	LeMole Naval Architecture	Michael LeMole (test@perscopeholdings.com)
00029594	Datrex Inc	PATRICK MANSFIELD (test@perscopeholdings.com)
00039150	All American Marine, Inc.	Ron Wille (test@perscopeholdings.com)
00020053	cape cod marine services inc.	Chris Costa (test@perscopeholdings.com)
00026551	Smith Marine, Inc	Matthew Placuche (test@perscopeholdings.com)
300222	Brunswick Commercial and Government Products Inc.	Rich Rizema (test@perscopeholdings.com)
00030928	CHISLETT'S BOATING AND DESIGN LLC	Cameron Chislett (test@perscopeholdings.com)

[OK](#)



Send Bid Actions

Option(s) ☒ Change bid status to "Sent" and notify vendors ☐ Change bid status to "Sent" only.

Send Bid

Cancel Bid Clone Bid Print

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**.