Job Aid:

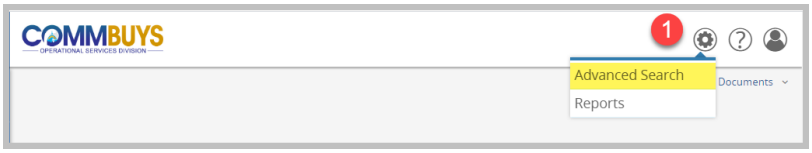
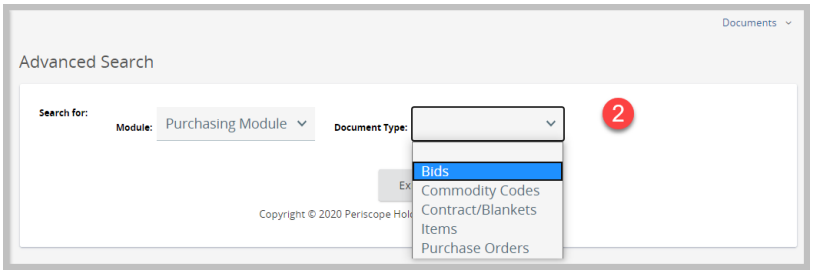
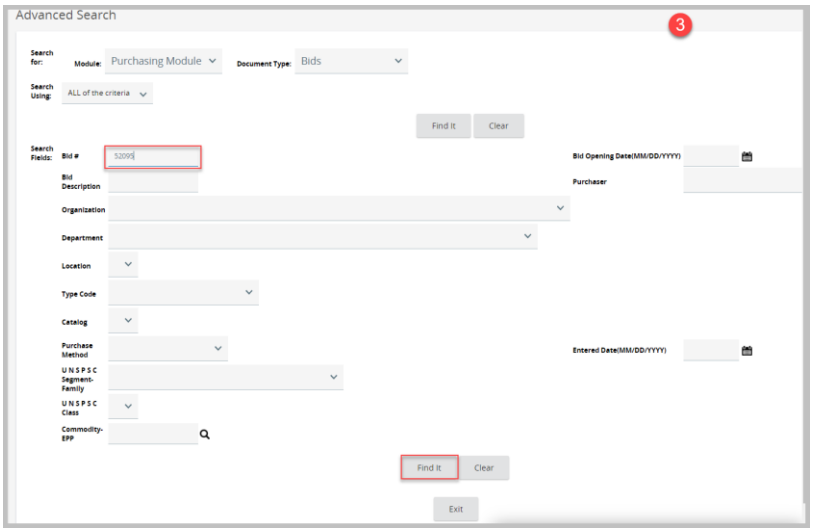
Creating a Quote in COMMBUYS: How to Respond to Bid Solicitations

This Job Aid shows how to:

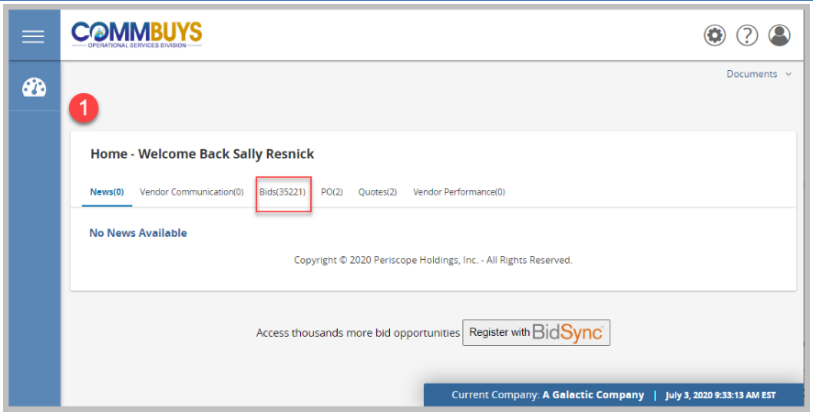
- Create a quote in response to a bid solicitation posted in COMMBUYS

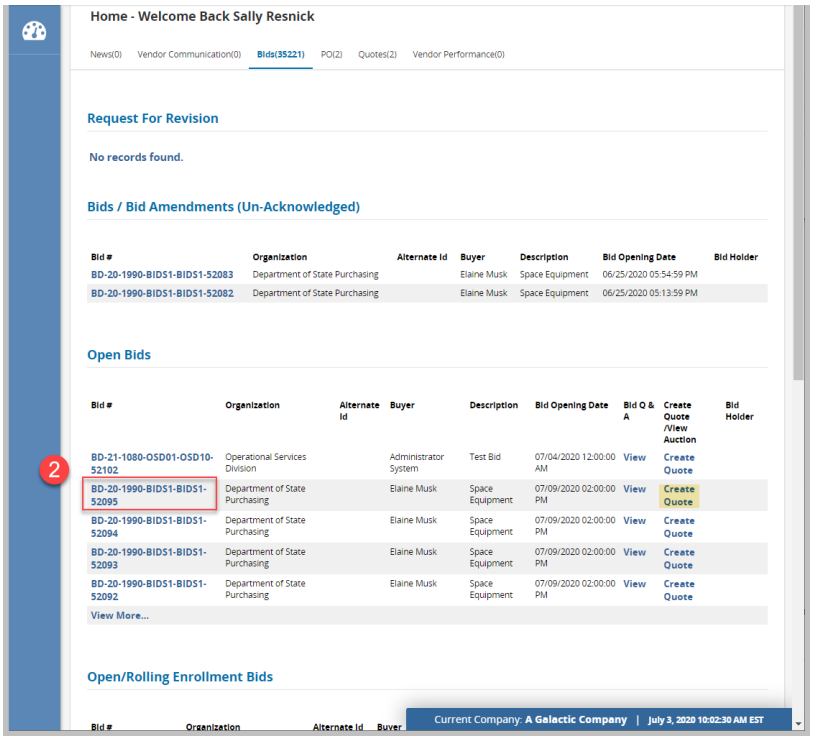
Of Special Note:

- Only users with the Seller role can create a quote in COMMBUYS. This Job Aid begins from the Seller Home Page. For guidance on how to get to the Seller Home Page, consult the Job Aid "Basic COMMBUYS Navigation for Vendors."
- The Items Tab of a quote response is especially important. Be sure to carefully review the Bid Documents (RFR, RFQ, Bid Response form, etc.) for specific guidance. Skipping the Items Tab may result in a "No Bid" response.

Screenshot	Directions
  	**Step 1: Accessing the Bid - Advanced Search** 1. Click on the **Settings** icon and select the **Advanced Search** option. 2. Select **Bids** from the **Document Type** dropdown menu. It may take a few moments for COMMBUYS to generate a search form. 3. Type a search term into a field. The example show here uses the last 5 digits of a bid number in the **Bid #** field. This search works well since the result probably will be only the bid you are searching for. Click **Find It** or hit the Enter key on your keyboard. 4. From the search results (not shown), click on the hyperlinked Bid Solicitation number (displays on the left side of the screen) to open and review details.

Screenshot	Directions

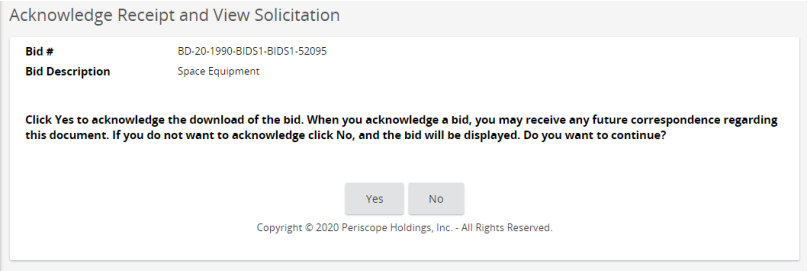




Step 1a: Accessing the Bid – Bids Tab

1. From the Seller Homepage click on the **Bids** tab.
2. Select a bid of interest from the **Bids/Bid Amendments (Unacknowledged)**, **Open Bids**, or **Open/Rolling Enrollment Bids** section. Click the blue hyperlinked **Bid Number** to open and review the Bid Solicitation.

   Note: If you have already reviewed and acknowledged the Bid Solicitation, downloaded attachments, and are ready to initiate a quote, click the **Create a Quote** hyperlink highlighted here, then skip to Step 5.



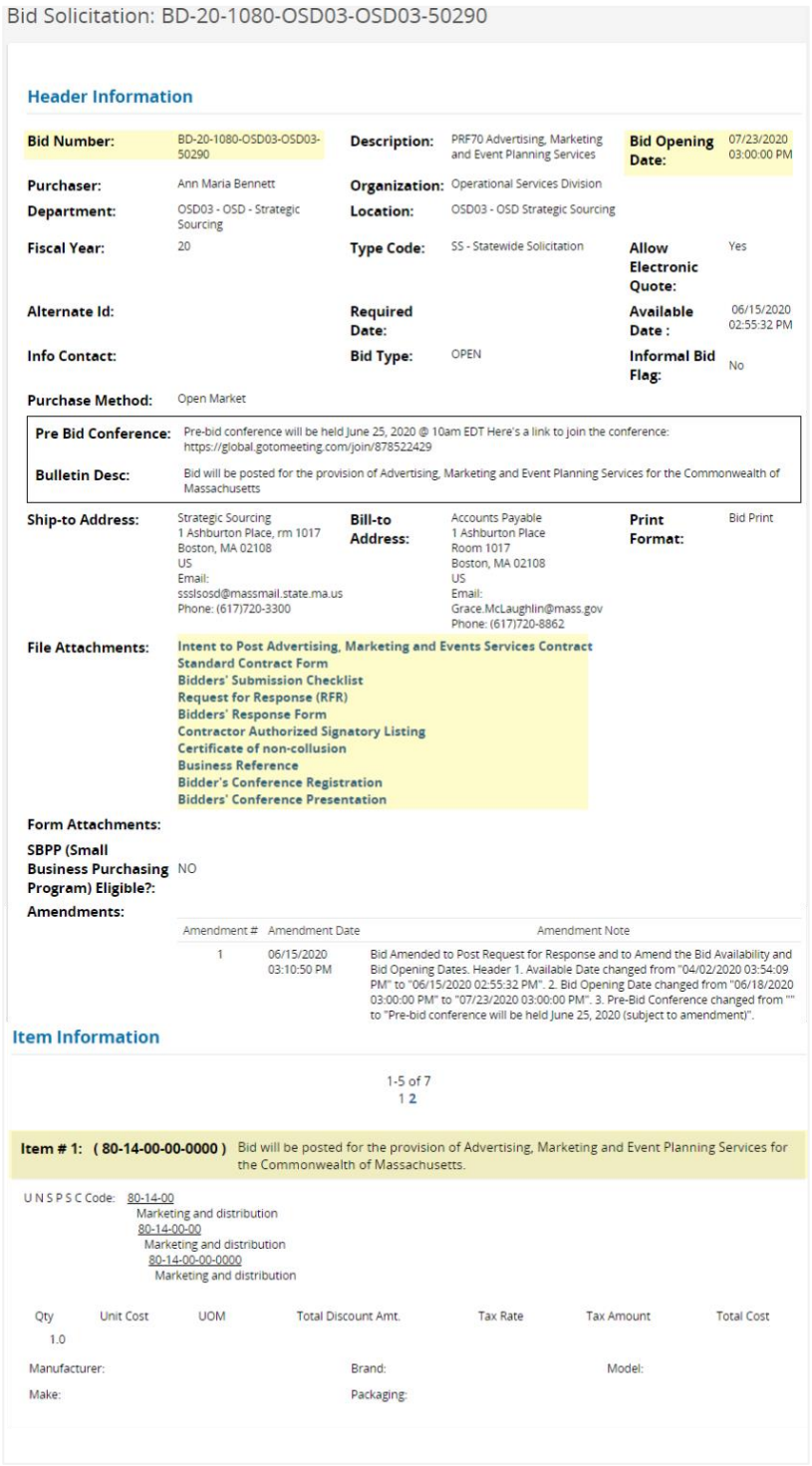
Step 2: Acknowledge Receipt

1. Click the **Yes** button to acknowledge the download of the bid *or* click **No** to proceed to the Bid Details without acknowledging.

Note: With acknowledgement, you agree to receive any future correspondence regarding the bid solicitation including amendments.

If you select **No** you may still view the bid and submit a quote but will not receive notifications regarding updates or amendments.

Screenshot



Bid Solicitation: BD-20-1080-OSD03-OSD03-50290

Header Information

Bid Number:	BD-20-1080-OSD03-OSD03-50290	**Description:**	PRF70 Advertising, Marketing and Event Planning Services	**Bid Opening Date:**	07/23/2020 03:00:00 PM
Purchaser:	Ann Maria Bennett	**Organization:**	Operational Services Division		
Department:	OSD03 - OSD - Strategic Sourcing	**Location:**	OSD03 - OSD Strategic Sourcing		
Fiscal Year:	20	**Type Code:**	SS - Statewide Solicitation	**Allow Electronic Quote:**	Yes
Alternate Id:		**Required Date:**		**Available Date :**	06/15/2020 02:55:32 PM
Info Contact:		**Bid Type:**	OPEN	**Informal Bid Flag:**	No
Purchase Method:	Open Market				

Pre Bid Conference: Pre-bid conference will be held June 25, 2020 @ 10am EDT Here's a link to join the conference: https://global.gotomeeting.com/join/878522429

Bulletin Desc: Bid will be posted for the provision of Advertising, Marketing and Event Planning Services for the Commonwealth of Massachusetts

Ship-to Address:	Strategic Sourcing 1 Ashburton Place, rm 1017 Boston, MA 02108 US Email: ssslsosd@massmail.state.ma.us Phone: (617)720-3300	**Bill-to Address:**	Accounts Payable 1 Ashburton Place Room 1017 Boston, MA 02108 US Email: Grace.McLaughlin@mass.gov Phone: (617)720-8862	**Print Format:**	Bid Print

File Attachments:
Intent to Post Advertising, Marketing and Events Services Contract
Standard Contract Form
Bidders' Submission Checklist
Request for Response (RFR)
Bidders' Response Form
Contractor Authorized Signatory Listing
Certificate of non-collusion
Business Reference
Bidder's Conference Registration
Bidders' Conference Presentation

Form Attachments:

SBPP (Small Business Purchasing Program) Eligible?: NO

Amendments:

Amendment #	Amendment Date	Amendment Note
1	06/15/2020 03:10:50 PM	Bid Amended to Post Request for Response and to Amend the Bid Availability and Bid Opening Dates. Header 1. Available Date changed from "04/02/2020 03:54:09 PM" to "06/15/2020 02:55:32 PM". 2. Bid Opening Date changed from "06/18/2020 03:00:00 PM" to "07/23/2020 03:00:00 PM". 3. Pre-Bid Conference changed from "" to "Pre-bid conference will be held June 25, 2020 (subject to amendment)".

Item Information

1-5 of 7
1 2

Item # 1: (80-14-00-00-0000) Bid will be posted for the provision of Advertising, Marketing and Event Planning Services for the Commonwealth of Massachusetts.

UNSPSC Code: 80-14-00
Marketing and distribution
80-14-00-00
Marketing and distribution
80-14-00-00-0000
Marketing and distribution

Qty	Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
1.0						

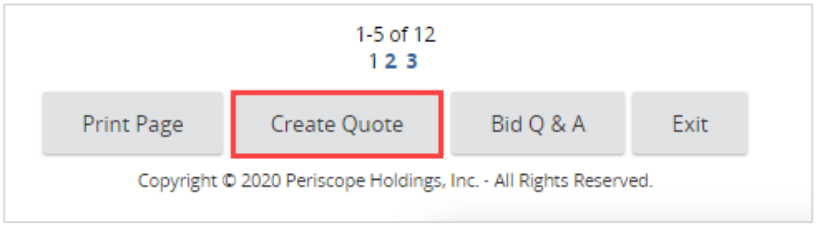
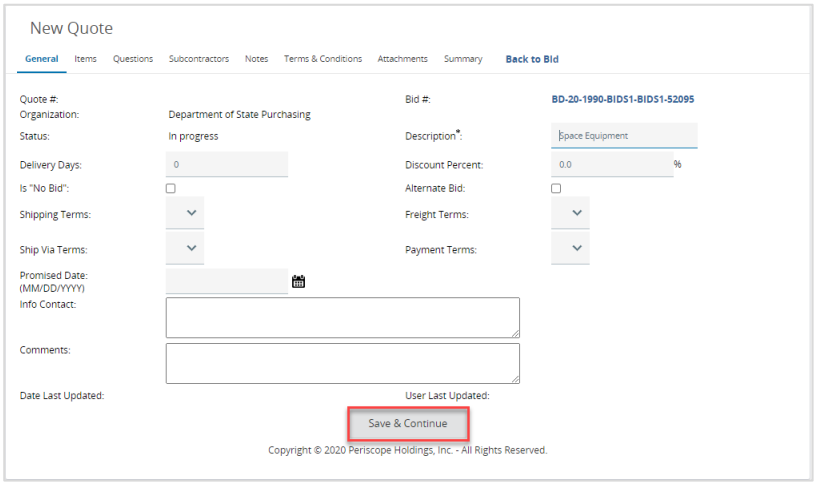
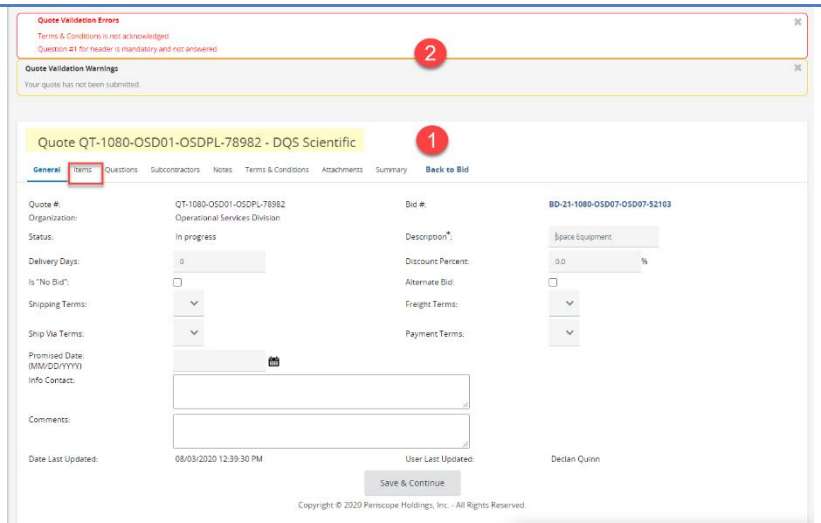
Manufacturer: Brand: Model:
Make: Packaging:

Directions

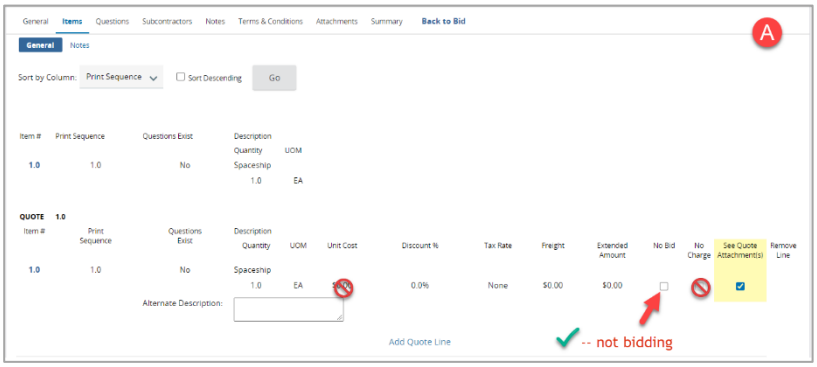
Step 3: Reviewing Bid Solicitations

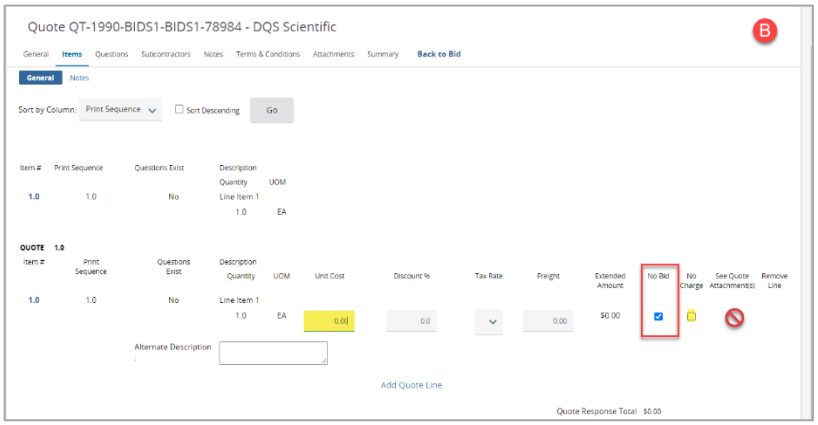
Important information displayed on a COMMBUYS Bid Solicitation includes:

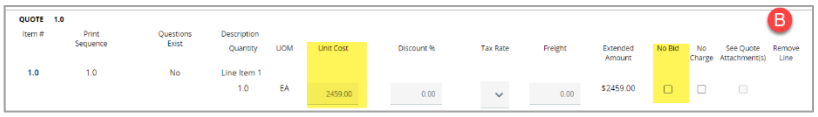
- **Bid Number**: COMMBUYS-generated document number. Use last 5 digits for searches.
- **Description**: information varies according to Buyer input.
- **Bid Opening Date**: the date and time the bid closes to vendor quote submission; the deadline. Except for Rolling Enrollment solicitations, it is also the date the buyer may view submissions for evaluation.
- **Purchaser**: the person who posted the bid solicitation. Unless indicated elsewhere, this is also the buyer contact.
- **Type Codes**:
  SW: Statewide bid solicitation. OSD is the only organization that can designate this.
  NS: Non-Statewide. Departments and municipal users select this.
- **Allow Electronic Quote**: When marked yes, vendor responses must be submitted through COMMBUYS.
- **Available Date**: date bid was publicly posted on COMMBUYS.
- **Info Contact**: contact person for the bid. If the field is blank, the Purchaser is the contact.
- **Bid Type**: Most bids are "Open"; any vendor can respond. "Closed" bids are restricted to selected vendors already on the existing contract.
- **Rolling Enrollment**: If marked "Yes" the Purchaser can see vendor responses before the Bid Opening Date. Typically, this designation is used when the Purchaser is developing a list of businesses who are qualified to provide goods and services over a contract period.
- **Pre-Bid Conference**: details provided if such a meeting will take place.
- **File Attachments**: bid documents and forms uploaded by the agency. Be sure to download and read all attachments starting with the Request for Response (RFR). Complete forms and documents as instructed.
- **Item Information**: commodity code (UNSPSC), description, and other criteria.

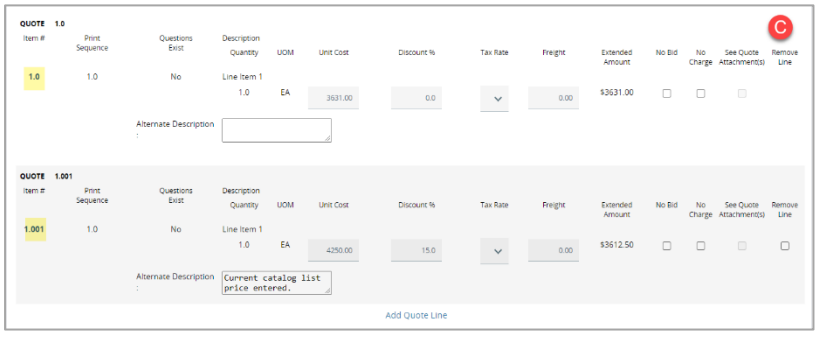
Screenshot	Directions
	**Step 4: Creating a Quote Response** 1. Scroll to the bottom of the Bid Solicitation screen. 2. Click **Create a Quote**.
	**Step 5: New Quote Screen - General Tab** 1. COMMBUYS displays the **General Tab** on a "New Quote" screen. In most cases, editing these fields is not suggested. Read the RFR for guidance. Editable fields include: • **Description**: Defaults to the description from the bid solicitation. • **Delivery Days**: Days to deliver goods or services if awarded a contract that results in purchase orders. • **Discount Percent**: If entered, applies globally to all quoted items. • **Is "No Bid"**: Checkmark to formally declare that you will not be submitting a quote for this bid. • **Alternate Bid**: Checkmark to formally flag a quote as an alternate response if the buyer has allowed multiple quotes. • **Promised Date:** Due date to deliver items. • **Info Contact**: Contact information for questions regarding quote. This field is limited to 400 characters. • **Comments**: Field to enter notes to the buyer. Limit is 400 characters. 2. Click **Save & Continue**.
	**Step 6: Review System Messages** 1. The pages refreshes displaying a **Quote Number**. 2. System messages are also displayed. • A red error message with steps that must be taken before a quote can be submitted. Following the steps in this Job Aid will resolve the errors. • A yellow message reads: Your quote has not been submitted. The message disappears once the quote is submitted. 3. Click on the **Items** tab to continue creating the quote

Screenshot	Directions









Step 7: Complete the Quote Items Tab

1. Responding to Items. Actions needed to complete the Items tab vary depending upon how the Bid issuer configured it. Read the instructions given in the RFR to determine how best to complete the Quote Items tab.

   The Items tab is the area to:
   - indicate which item(s) are being Quoted. A **No Bid** Item selection indicates not bidding.
   - indicate that quote cost data is submitted as an attachment (If **See Quote Attachment** has been enabled)
   - enter unit cost per Bid Item(s) (if applicable)

   A) If the **See Quote Attachment(s)** box is pre-selected, the **No Charge** and **Unit Cost** selections are disabled.

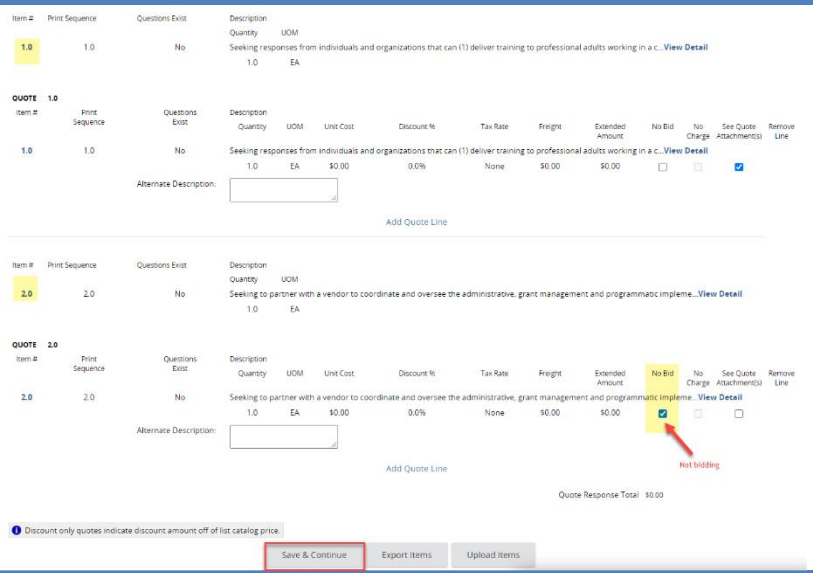
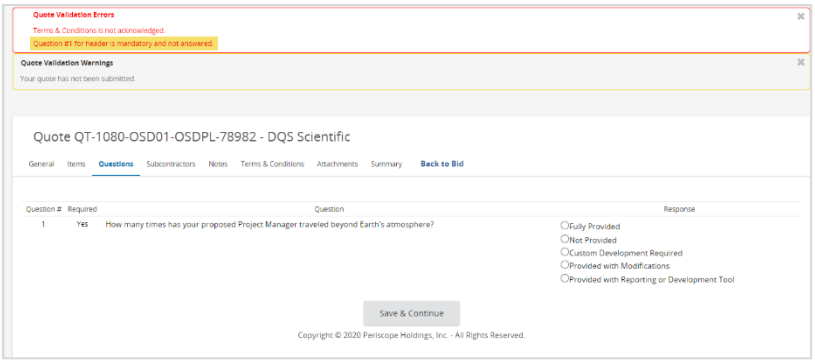
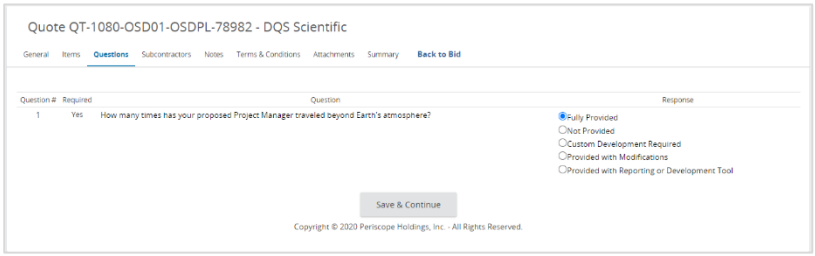
   ✓ Ensure the **See Quote Attachment(s)** indicator is selected for each Bid Item for which you wish to be considered.
   ✓ Based on instructions from the RFR, be sure to upload response files on the Attachments tab (see Step 10).
   ✓ Select **No Bid** for items you are not bidding on.

   B) If the **No Bid** column is pre-selected, the **No Charge** and **Unit Cost** selections are editable; the **See Quote Attachment(s)** column is disabled.

   ✓ Ensure **Unit Cost** is entered or **No Charge** indicator is selected for *each Item you are bidding on*. Doing so deselects the **No Bid** box.
   ✓ Leave the selection **No Bid** for items you are not bidding on.
   ✓ Based on instructions from the RFR, be sure to upload response files on the Attachments tab (see Step 10).

   C) To add an additional quote item to a Bid Solicitation item, click the **Add Quote Item** hyperlink. *Consult the RFR carefully to see if this option is encouraged or discouraged.*

   ✓ Fill in the **Alternative Description** box.
   ✓ Complete pricing details.
   ✓ The added item is numbered with a decimal that follows the original Quote Item number.

Screenshot	Directions
	**Step 7 (continued): Quote Items Tab** 2. To view additional details about an item, click on the blue hyperlinked Item #. Click **Save& Exit** to return to the Items Tab. 3. Once all information has been completed on the **Items** tab, click **Save & Continue**. Click on the **Questions** tab. **NOTE:** COMMBUYS offers Export and Upload capabilities for uncommon instances when a bid solicitation and quote response include many items. The Quick Reference Guide "Using the Items Export and Upload Tool" provides instructions.
	**Step 8: Answering Buyer Questions** The Purchaser may use COMMBUYS to ask questions that must be answered before a quote can be submitted. In such cases, a red error message displays at the top of the screen. 1. Type answers to questions 2. Click **Save & Continue**. Any Question-related error message disappears. 3. If you would like to record internal **Notes** about the quote, click the **Notes** tab. 4. Otherwise, click the **Terms & Conditions** tab.
	**The Notes Tab (Optional)** Provides space for vendor users to record notes. Information saved here is not accessible outside the vendor account.

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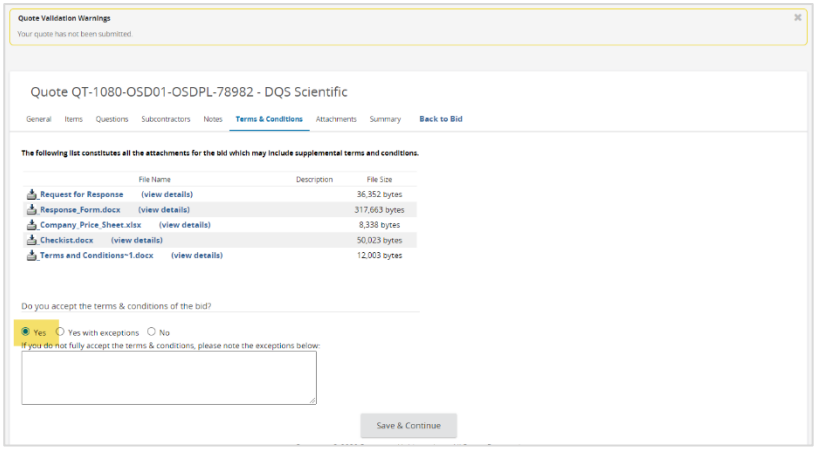
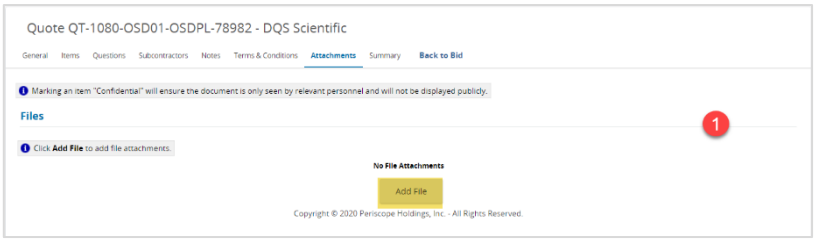
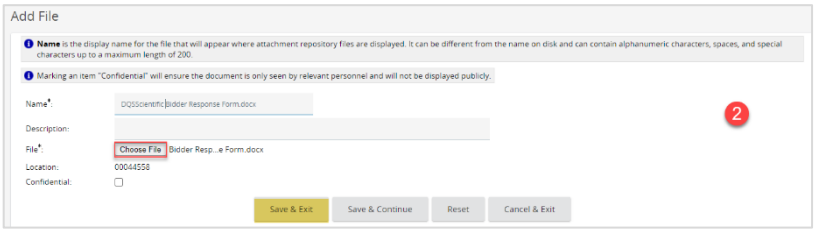
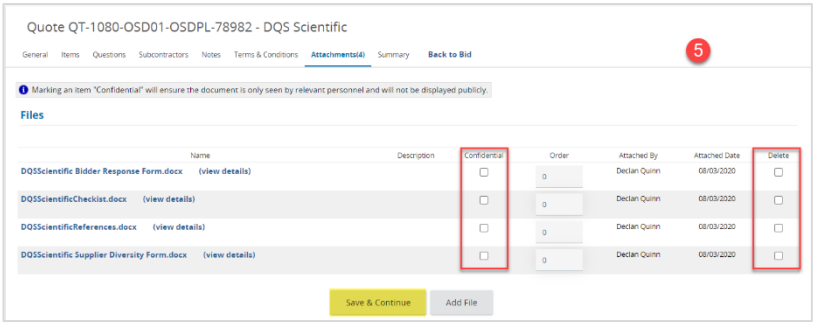
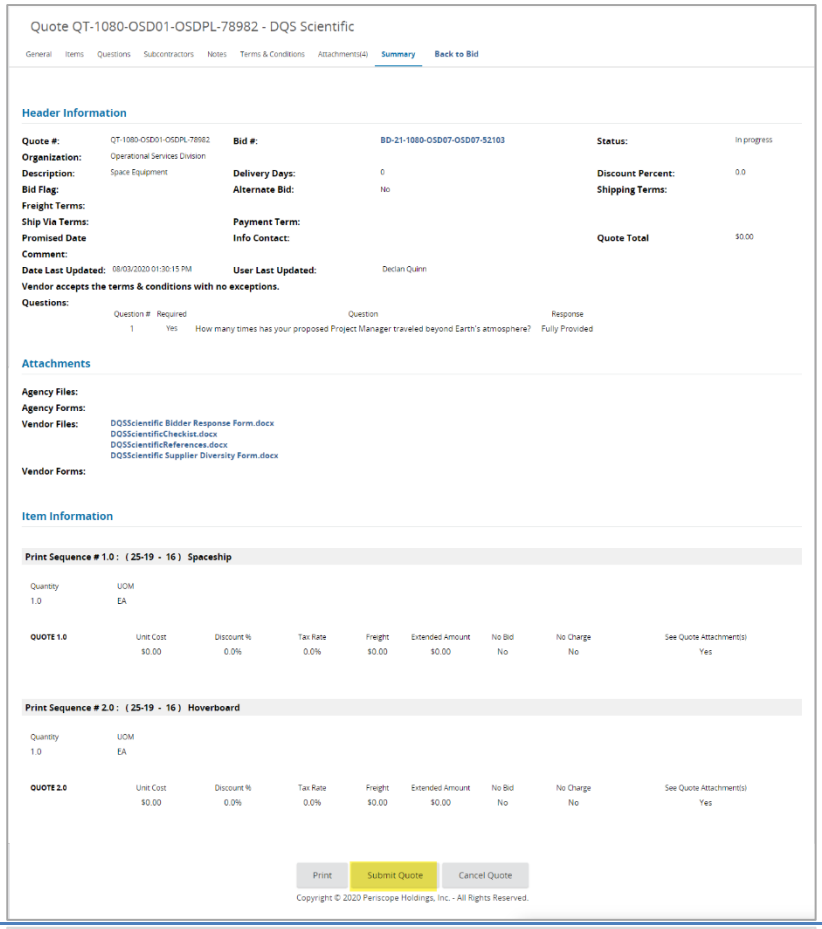
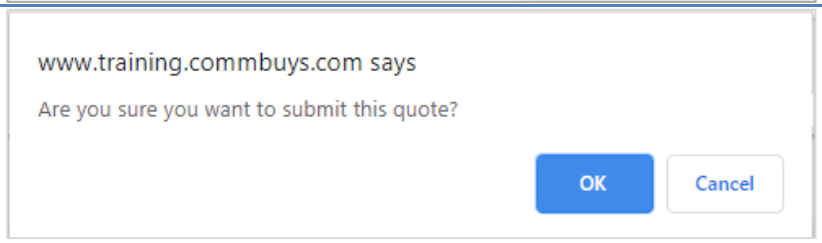
	**Step 9: Accepting Terms & Conditions** All files attached to the Bid Solicitation can also be found on (and downloaded from) the Terms & Conditions tab. 1. Click the radio button next to **Yes** to accept the Terms & Conditions of the Bid Solicitation. 2. Click **Save & Continue**. The red system message disappears. 3. Click on the **Attachments** tab.
  	**Step 10: Attaching Documents to Quote** 1. Click on **Add File**. 2. Click on **Choose File** to locate the file you wish to upload. (This button may be labeled “Browse” in some browsers.) Locate and select a file then click **Open** to upload it. By default, the file’s original name is populated into the **Name** field on the **Add File** page. This can be edited to change the posted file name. The **Name** field is limited to 200 characters and can contain alphanumeric characters, spaces, and special characters. 3. The **Description** field is optional. It allows you to briefly describe the file. 4. Click **Save & Exit** to return to a list of all attachments. Repeat until all required documents are attached. 5. Check off the **Confidential** box to designate an attachment as confidential. Mark only those documents that contain confidential information not subject to the Massachusetts Public Records Law (e.g., those containing your Tax ID, bank account information, etc.) as confidential. Similarly, to remove an attachment uploaded in error, click the **Delete** box for the item. Click **Save & Continue** to save any changes. 6. Click the **Summary** tab. **Note:** Unless an RFR or other bid document requests or allows zipped files, each required document must be added individually.

Screenshot	Directions
	**Step 11: Reviewing and Submitting Quotes** 1. Review the quote information displayed on the **Summary** tab. Edit as needed by clicking on the tab that requires updating. (Remember to click **Save & Continue** on any tab you change.) 2. Remember that the quote does not cover items marked as “No Bid.” 3. Click the **Submit Quote** button at the bottom of the page.
 	**Step 12: Confirming Quote Submission** 1. Click **OK** on the popup message window to proceed with submitting your quote. 2. Once the page refreshes, note that the quote status has changed to “submitted,” confirmation that the process is complete. Note that once the Bid Opening Date passes, the **Submit** button disappears. It is not possible to submit a late response. *Once a quote is submitted, it is possible to Withdraw it by clicking the **Withdraw Quote** button at the bottom of the Summary Tab Page. See the Job Aid “How to Withdraw, Reopen, and Resubmit a Quote in COMMBYTS.”*