OPERATIONAL SERVICES DIVISION

Job Aid:

Create a Quote in COMMBUYS

This Job Aid shows how to:

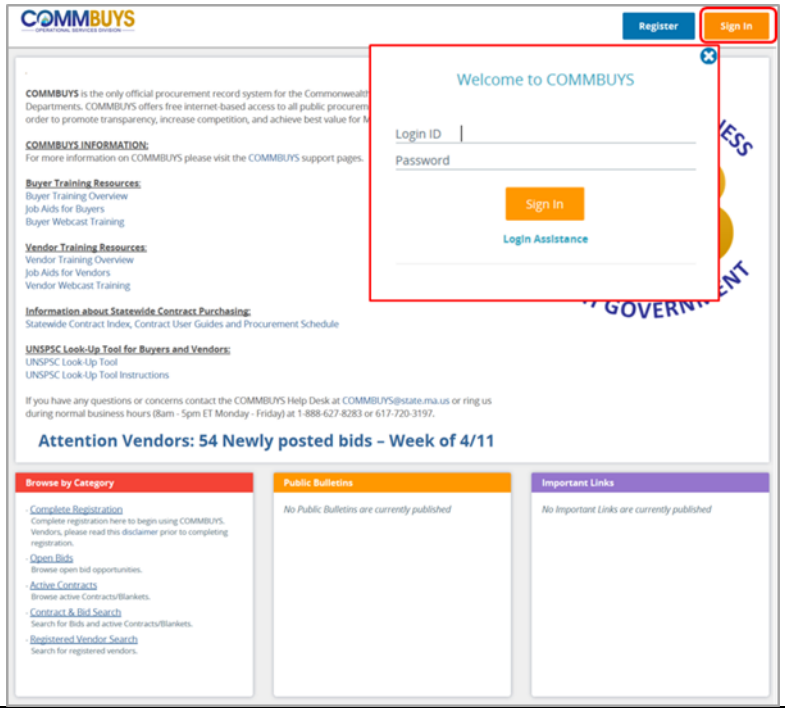
- Create a quote in response to a bid in COMMBUYS

Of Special Note:

It is the vendor's responsibility to read the bid and any attachments (including the Request for Response) in its entirety prior to creating and submitting a quote.

OSD recommends you create a bid specific folder that is easily accessible with any completed documents or forms that must accompany the quote. Be sure to follow any file upload instructions provided by the buyer (e.g. naming convention, file description, or file size).

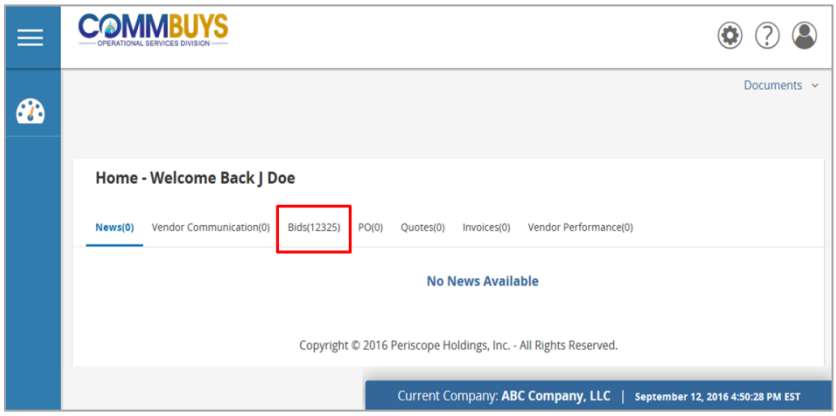
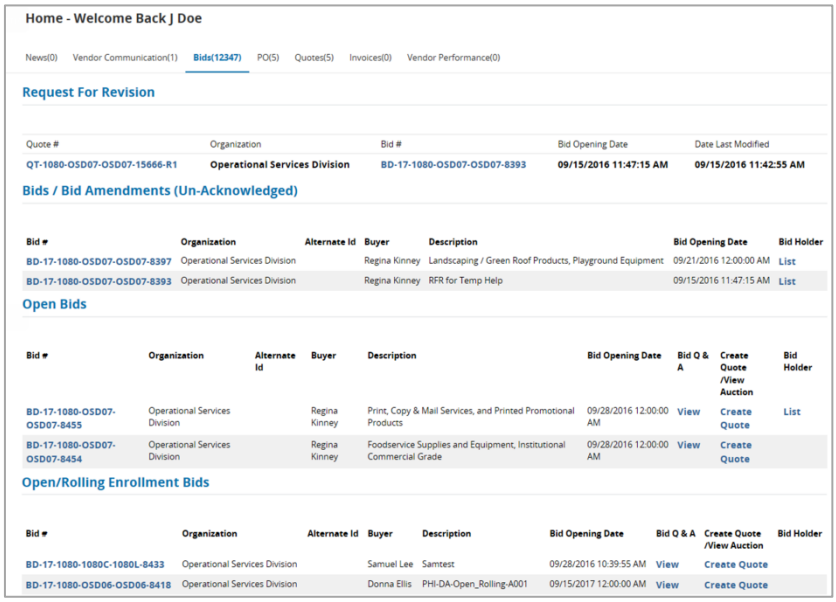
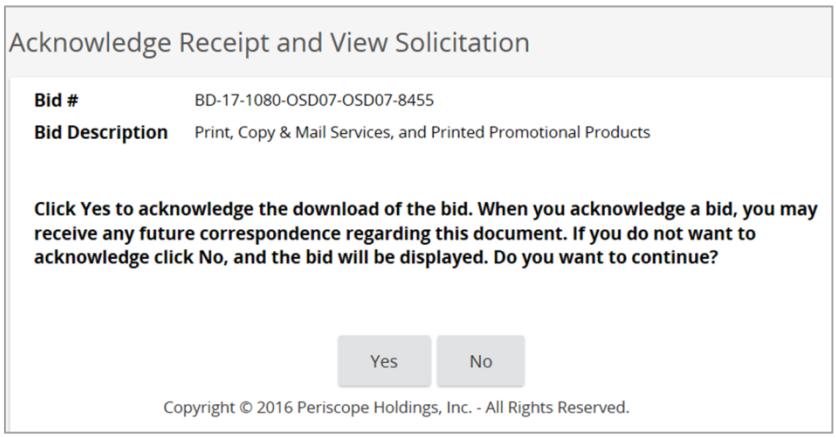
Only users with Seller privileges can create a quote in COMMBUYS. These instructions assume the logged in user has Seller credentials.

Screenshot	Directions
	**Step 1: Launching COMMBUYS** 1. Enter the uniform resource locator (URL) address for COMMBUYS (https://www.commbuys.com) or (commbuys.com) in your browser. 2. Once the COMMBUYS landing page displays click on the **Sign In** button. 3. Enter your **Login ID** and **Password** and sign in to COMMBUYS.

OPERATIONAL SERVICES DIVISION

Job Aid:

Create a Quote in COMMBUYS

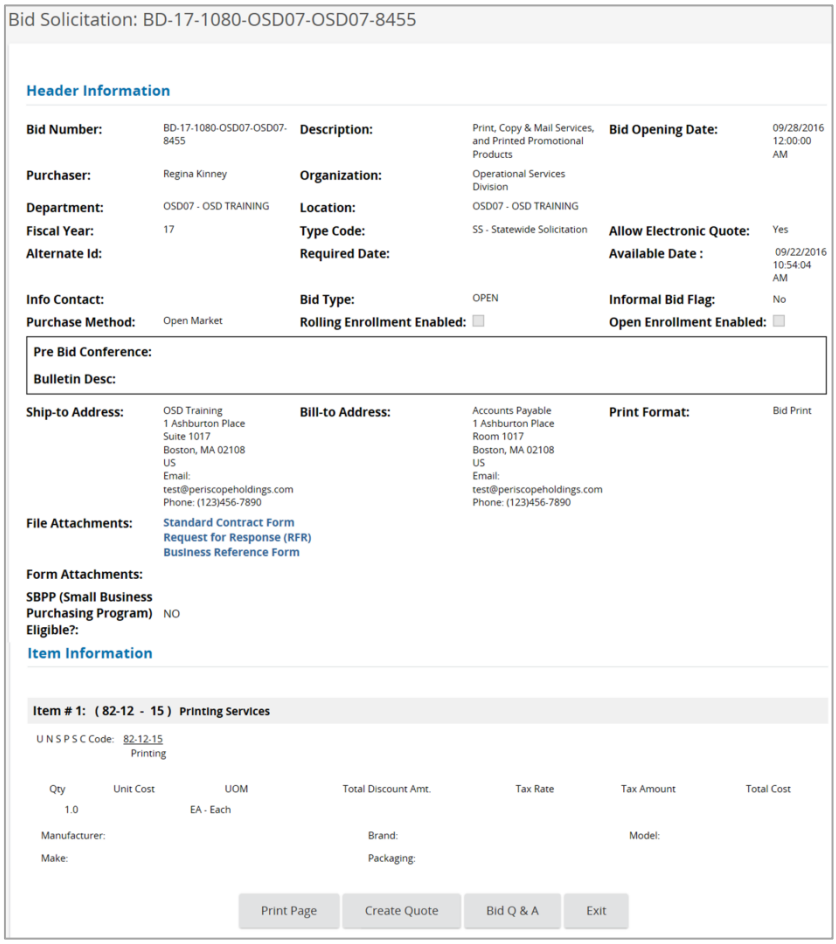
Screenshot	Directions
	**Step 2: Accessing Bids** 1. From the Homepage click on the **Bids** tab to view bids that have been sent to your company.
	**Step 3: Opening Bids** 1. Click on the hyperlinked **Bid #** to open and review a bid in the **Bids/Bid Amendments (Un-Acknowledged)**, **Open Bids**, or **Open/Rolling Enrollment Bids** sections.
	**Step 4: Acknowledging Receipt of Bids** 1. Click the **Yes** button to acknowledge and access the bid. **Note:** In this acknowledgement you agree to receive any future correspondence regarding this bid. If you select **No** you may still view the bid but will not receive any notifications regarding updates or amendments.

OPERATIONAL SERVICES DIVISION

Job Aid:

Create a Quote in COMMBUYS

Screenshot	Directions



Step 5: Reviewing Bids

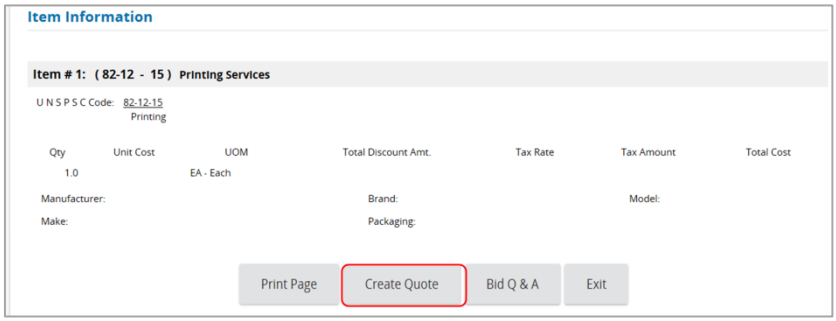
1. Review the following information displayed on the bid's Summary tab:

- **Bid Number**: COMMBUYS-generated document number.
- **Description**: the information displayed in this section varies by the buyer. It could be the agency's internal bid number, a brief description of the bid, or keywords that describe the goods or services being procured.
- **Bid Opening Date**: date the bid is opened for evaluation. This is also the date the bid closes to quote submission by vendors.
- **Purchaser**: contact person and/or the creator of the bid.
- **Organization**, **Department**, **Location**: agency information.
- **Type Code**: will either be **SW** (for Statewide bids) or **NS** (for Non-Statewide/Departmental bids).
- **Allow Electronic Quote**: should always be **Yes**. This allows vendors to submit their quote response through COMMBUYS.
- **Required Date**: date agency requires the goods or services being procured. Follow up with bid contact.
- **Available Date**: date bid was posted on COMMBUYS.
- **Info Contact**: contact person for the bid.
- **Bid Type**: will either be **Open** (any vendor can respond) or **Closed** (only selected vendors can respond).
- **Informal Bid Flag**: will either be **Yes** (buyer can see quotes before the Bid Opening Date) or **No** (buyer cannot see quotes before the Bid Opening Date).
- **Purchase Method**: will either be **Open Market** (one time bid) or **Blanket** (contract).
- **Pre-Bid Conference Details**
- **Ship-to and Bill-to Addresses**
- **File Attachments**: bid forms and documents uploaded by the agency. Be sure to read all attachments and complete/submit forms/documents as instructed.
- **Item Information**: item description, UNSPSC code, and other criteria entered by the buyer.

OPERATIONAL SERVICES DIVISION

Job Aid:

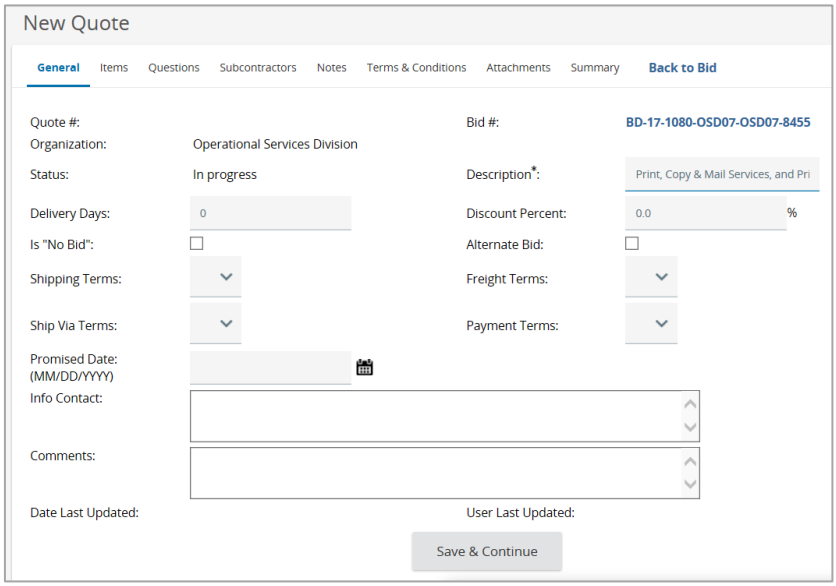
Create a Quote in COMMBUYS

Screenshot	Directions
	**Step 6: Creating Quotes** 1. Click the **Create Quote** button at the bottom of the **Bid Summary** page to open the **New Quote** page.

Job Aid:

Create a Quote in COMMBUYS

Screenshot	Directions



Step 7: Entering General Quote Information

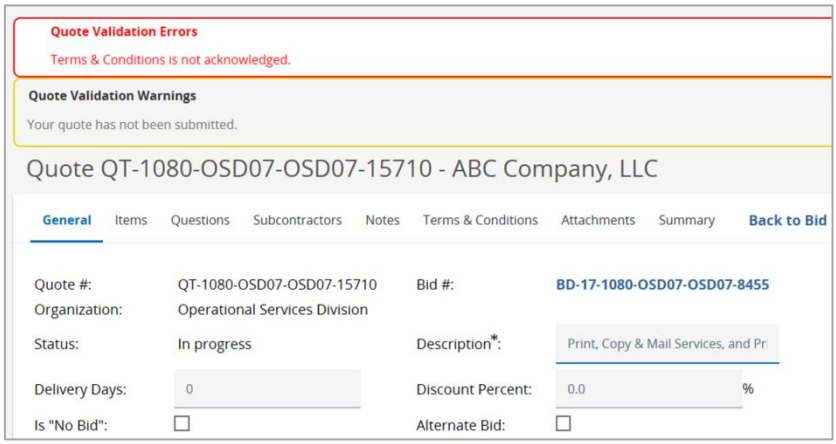
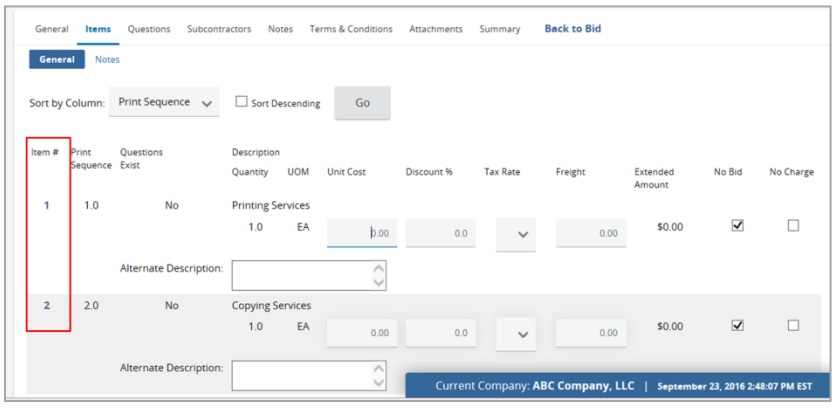
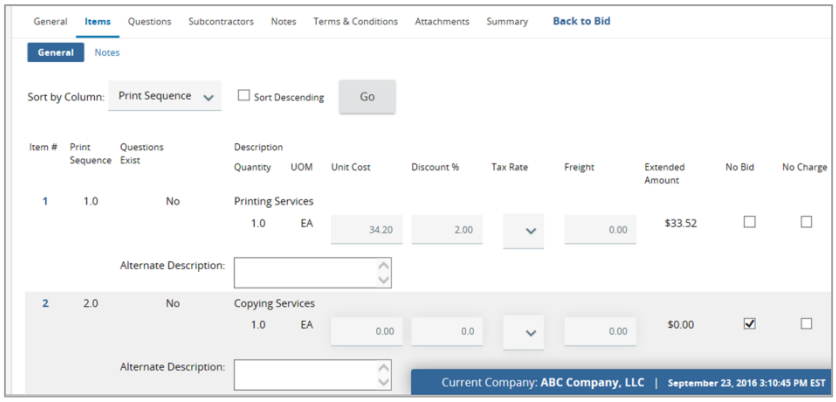
1. The General Tab is populated with some information from the bid. All fields on this page are options with the exception of the **Description**. Fields available to update include:

- **Description**: Defaults to the description of the bid. This can be edited.
- **Delivery Days**: Days to deliver goods or services upon successful awarding of bid/purchase order.
- **Discount Percent**: If entered, will automatically be applied to all items on quote. This can be done on an item by item basis on the item tab.
- **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 bid if this is the second quote for the vendor (if allowed by the buyer).
- **Shipping Terms**: Defaults from the vendor profile.
- **Freight Term**: Defaults from the vendor profile.
- **Ship Via Terms**: Defaults from the vendor profile.
- **Payment Terms**: Defaults from the vendor profile.
- **Promised Date**: Date to deliver items to the buyer.
- **Info Contact**: Contact information for questions regarding quote. This field is limited to 400 characters.
- **Comments**: Field to enter in notes to the buyer. This field is limited to 400 characters.

2. Click the **Save & Continue** button to save your updates and generate a **Quote Number**.

Job Aid:

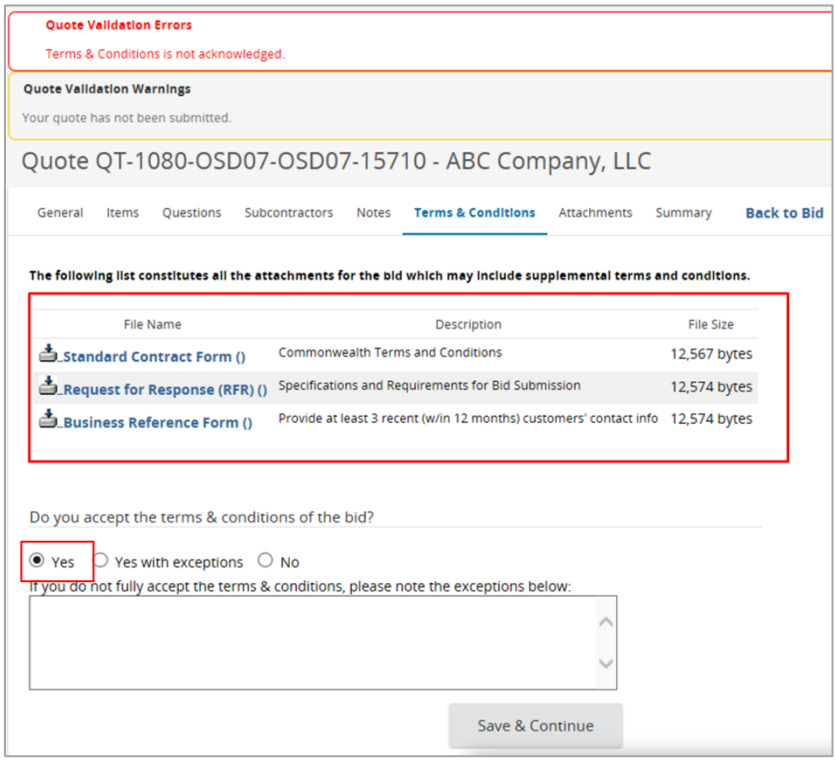
Create a Quote in COMMBUYS

Screenshot	Directions
	**Step 8: Reviewing System Messages** 1. Once you click **Save & Continue** the page will refresh itself and display two system messages and a **Quote Number**. 2. The following messages will be displayed: • A red error message that reads: **Terms and Conditions is not acknowledged**. To resolve this, click on the **Terms & Conditions** tab to accept the terms. • A yellow warning that reads: **Your quote has not been submitted**. There is no further action required to resolve this. This is an informational message. 3. Click on the **Items** tab to continue creating your quote.
	**Step 9: Entering Pricing** 1. Input your quote information (e.g. Unit Cost, Discount, Freight) for the goods or services you wish to bid on. To view additional details about an item, click on the blue hyperlinked **Item #**. 2. Once all information has been completed on the **Items** tab click **Save & Continue**. 3. Click on the **Terms & Conditions** tab.
	**Note:** By default the **No Bid** box will be checked off. Remember to enter a **Unit Cost** or check the **No Charge** if no dollar amount is required for the quote. By leaving a checkmark in the **No Bid** box you are indicating that you are not submitting a price quote for the item.

OPERATIONAL SERVICES DIVISION

Job Aid:

Create a Quote in COMMBUYS

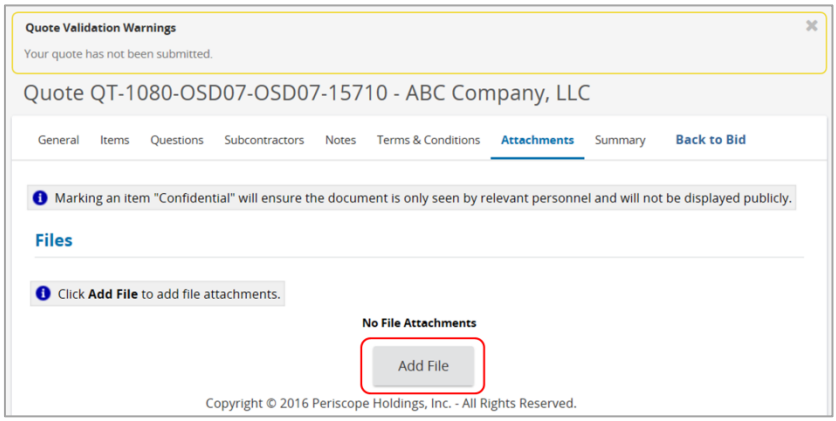
Screenshot	Directions
	**Step 10: Accepting Terms & Conditions** 1. Click the radio button next to **Yes** to accept the Terms & Conditions. 2. Click **Save & Continue**. 3. Click on the **Attachments** tab. Note: Any files uploaded to the bid by the buyer (such as the RFR) can also be found in the **Terms & Conditions** tab.

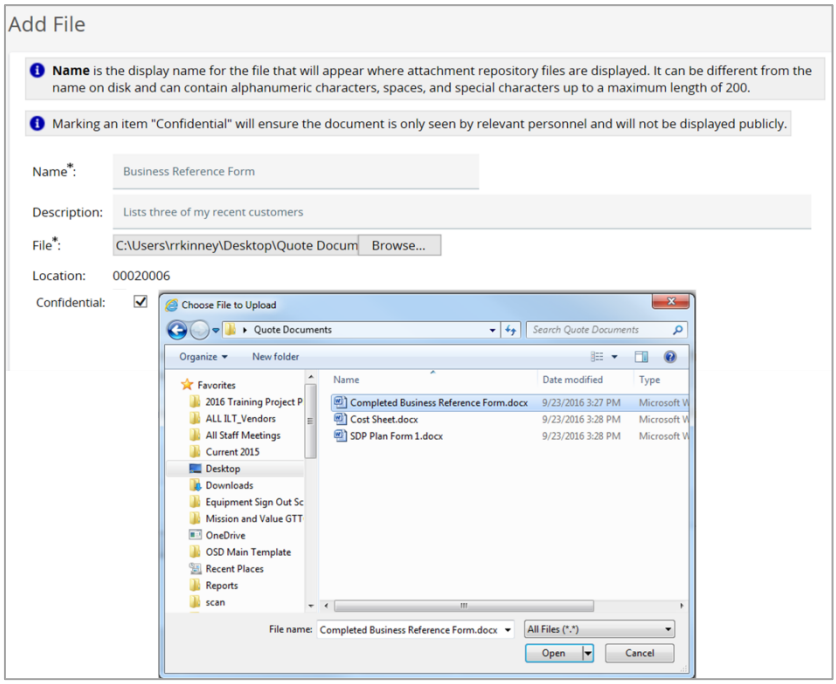
OPERATIONAL SERVICES DIVISION

Job Aid:

Create a Quote in COMMBUYS

Screenshot	Directions





Step 11: Attaching Documents to Quote

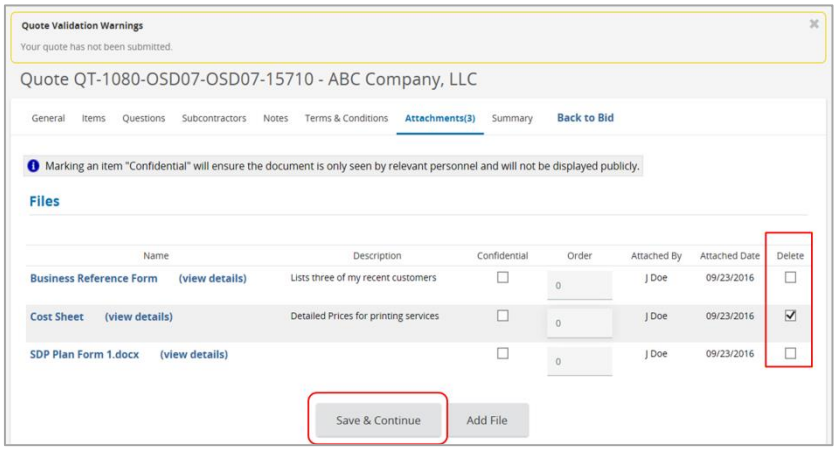
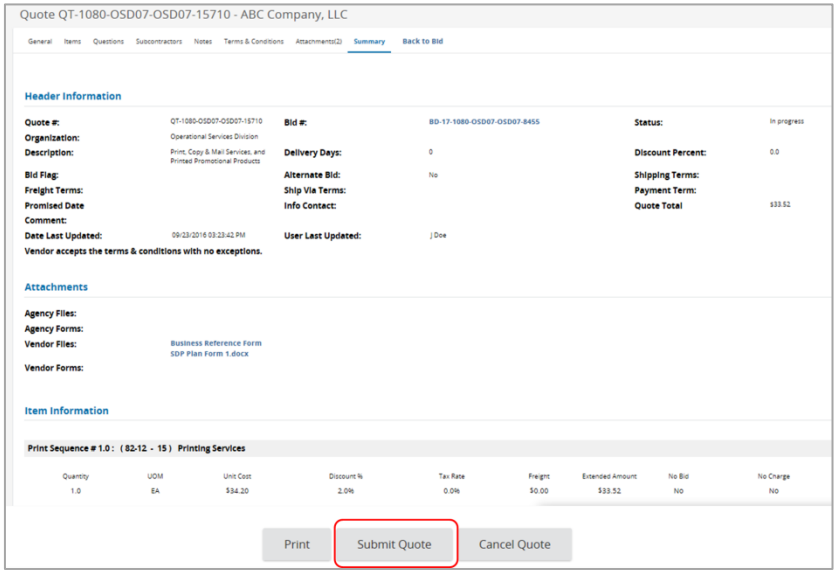
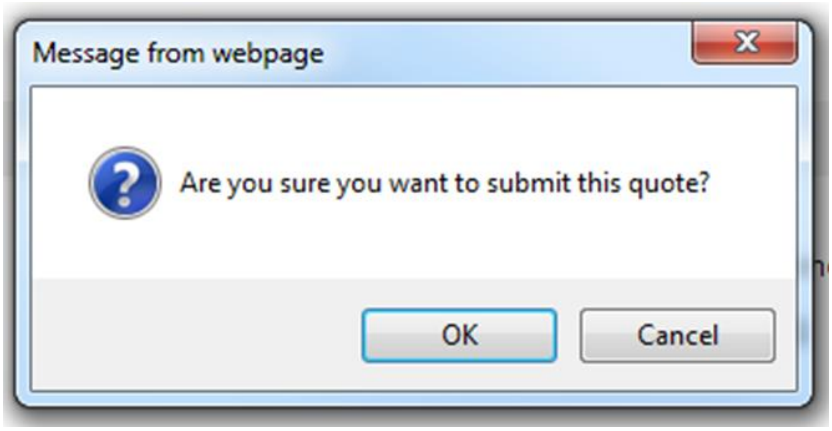
1. Click on **Add File**.
2. Click on **Browse** to locate the file you wish to upload.
3. Once the correct file is located, click **Open** to return to the **Add File** page.
4. By default, the file's name is populated into the **Name** field. This can be edited to reflect that you wish to display when the file is posted. The **Name** field is limited to 200 characters and can contain alphanumeric characters, spaces, and special characters.
5. The **Description** field is optional and it allows you to briefly describe the attached file.
6. 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.
7. Once you are done naming and describing your file, click **Save & Exit** to return to **the Attachments** tab.

Note: Each document must be added one at a time. To add additional attachments repeat the actions 1-6 within this step.

Job Aid:

Create a Quote in COMMBUYS

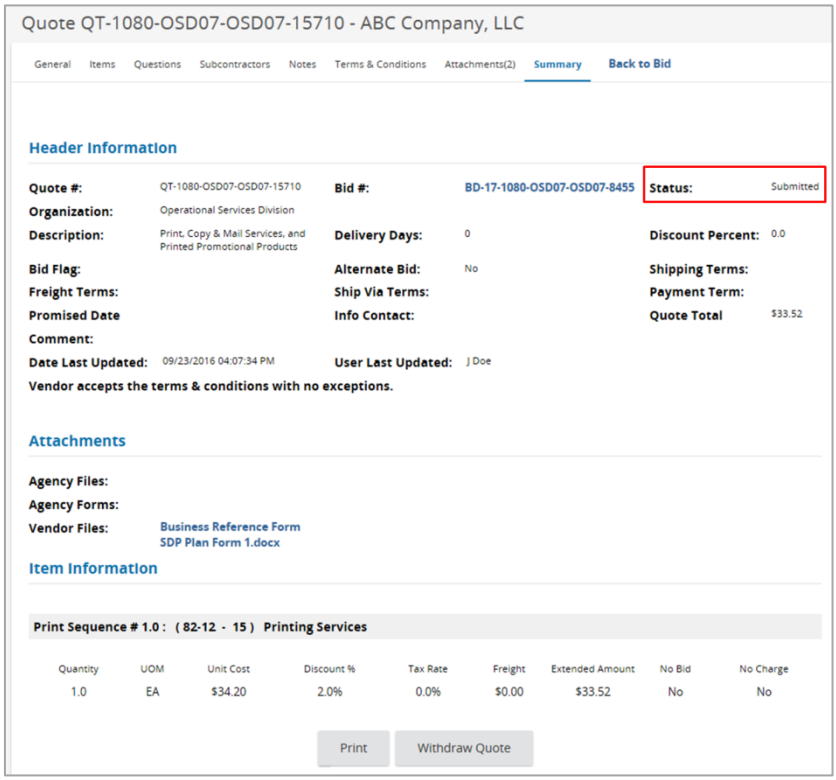
Screenshot	Directions
	**Step 12: Removing Attachments** 1. Check the box in the **Delete** column next to the file you wish to remove. 2. Click **Save & Continue** to remove the file from the attachment list. 3. Click the **Summary** tab to review your quote information.
	**Step 13: Reviewing and Submitting Quotes** 1. Review the quote information displayed on the **Summary** tab, and edit as needed by clicking on the tab that requires updating. 2. If no updates are required, click the **Submit Quote** button at the bottom of the page.
	**Step 14: Confirming Quote Submission** 1. Click **OK** on the popup message window to proceed with submitting your quote.

OPERATIONAL SERVICES DIVISION

Job Aid:

Create a Quote in COMMBUYS

Screenshot	Directions



Step 15: Withdrawing Quotes After Submission

1. The **Summary** tab redisplays with an updated status for the quote of **Submitted**.

2. From the **Summary** tab of the quote, you can **withdraw** the quote at any time before the **Bid Opening Date** or before the quote is viewed by the buyer.

   For more information on withdrawing quotes, please read the **Withdraw, Reopen, and Resubmit a Quote in COMMBUYS** job aid.