

Open Market Bid AGENCY1TEST13B0000690 Status: 2BI - In Progress

General Items Address Accounting Routing Attachments(2) **Notes(1)** **Bidders** Questions Amendments Q & A Reminders Summary

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	Preferred Delivery Method

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**

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The Bidders tab is where you can select the vendors that will be notified about this solicitation. You can also set some vendor viewing privileges related to the Bid on this tab. *Note the options which are not used.* Selecting either of these options will have no effect on your Bid. These settings are now controlled by the **Bid Type** field on the General tab. The vendor viewing configuration options on this screen include:

- The **Show Unit Prices to Vendors** box, which when checked displays any price estimates entered on the Items tab to vendors. This option is unchecked by default so that vendors are not given an idea of how much you are expecting to spend per item.
- The **Hide Bid Holder List on Vendor Side** box, which when checked will not allow vendors to see the other vendors that may respond to the solicitation. This option is checked by default so that vendors do not know who their potential competitors are.

If you make changes to either of those fields, click **Save & Continue**. Once you are ready to add vendors that will be notified, click **Lookup & Add Vendors** on the bottom of the screen.

Lookup & Add Reference Vendors - Bid AGENCY1TEST13B000690

Search Using:

Search Fields:

Vendor ID	<input type="text"/>	Vendor Name	<input type="text"/>
Vendor Tax ID	<input type="text"/> Show <input type="checkbox"/>	Vendor Legal Name	<input type="text"/>
Vendor Keyword	<input type="text"/>	Alternate ID	<input type="text"/>
ZIP Code	<input type="text"/>	County	<input type="text"/>
State	<input type="text"/>		
<input type="checkbox"/> Emergency Suppliers		<input type="checkbox"/> Reference Vendor	
NIGP Class	<input type="text"/>		
NIGP Class Item	<input type="text"/>		
NIGP Keyword	<input type="text"/>		
DUNS Number	<input type="text"/>		
Business Structure	<input type="text"/>		
Business Type (Check all that apply):	<input type="text"/>		

Browse by:

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Selecting **Lookup & Add Vendors** will display a pop-up window that enables you to search for vendors by a variety of criteria, including vendor name, tax ID, NIGP commodity code, and Business Type. You can either enter your criteria and select **Find It** to have the matching results return, or you can simply click the **Find Vendors for All Commodity Codes on the Bid** button along the bottom of the screen to return all vendors that have registered with the commodity codes associated with the items on your Bid.

Note that Buy4Michigan does not track the search criteria that you use to develop your Bidders list. If this information is needed for historical reference, please document this using the Notes tab.

Bidders Tab - Adding Bidders (cont.)

<input type="checkbox"/>	31446.0	Applegate, inc.			485 E South Street	Jackson	MI	Mr. Garry Applegate	(123)456-7890	No
<input type="checkbox"/>	47514.0	Arms & Cole-Hurst Mechanical			885 Robinwood Ct.	Traverse City	MI	Mr. Scott Hardy	(123)456-7890	No
<input type="checkbox"/>	13599.0	Arrow Motor & Pump			692 Central Avenue	Wyandotte	MI	Mrs. Dawn Jacobs	(123)456-7890	No
<input type="checkbox"/>	29445.0	ATI Group			3419 Pierson Place	Flushing	MI	Mr. Dirk Powell	(123)456-7890	No
<input type="checkbox"/>	45849.0	Beauchamp Plumbing and Heating, Inc.			P.O. Box 903	Gwinn	MI	Mr. Andrew Beauchamp	(123)456-7890	No
<input type="checkbox"/>	29046.0	Bonham Heating and Air Conditioning			2441 W. M-61	Gladwin	MI	Mr. Dave Bonham	(123)456-7890	No
<input type="checkbox"/>	43738.0	Brittany Mechanical LLC			1474 Montmorency Ln	Suttons Bay	MI	Mr. Mike Kirt	(123)456-7890	No
<input checked="" type="checkbox"/>	33067.0	Brooklyn Plumbing, Heating, & Air Conditioning Inc			P.O. Box 225 4017 Jefferson Rd.	Clarklake	MI	Mr. Chad Hagerty	(123)456-7890	No
<input type="checkbox"/>	23580.0	C.L. Mahoney Co., Inc.			438 Forest Street	Kalamazoo	MI	Mr. Jim Houghton	(123)456-7890	No
<input checked="" type="checkbox"/>	24693.0	Carrier Corporation			400 76th Street SW Suite 14	Byron Center	MI	Mr. Anthony Thompson	(123)456-7890	No
<input type="checkbox"/>	46173.0	CGL Corporation dba Carrier Great Lakes			33601 Schoolcraft	Livonia	MI	Mr. Joe Randolph	(123)456-7890	No
<input type="checkbox"/>	44476.0	Climate Control HVAC LLC			151 West Main St.	Farwell	MI	Mr. cody Mcconnell	(123)456-7890	No
<input type="checkbox"/>	35841.0	Clor & Associates LLC			18524 Mack Ave	Grosse Pointe Farms	MI	Mr. Joe Clor	(123)456-7890	No
<input type="checkbox"/>	44842.0	Con-Air Industries INC			4157 Seaboard RD.	Orlando	FL	Mr. Charles Adkinson	(123)456-7890	No
<input type="checkbox"/>	27259.0	Condor Piping, Inc.			28525 Beck Road Suite #120	Wixom	MI	Mr. Kerry Klein	(123)456-7890	No
<input type="checkbox"/>	39867.0	Controls & Meters Systems			3988 Holt Road	Holt	MI	Mr. John Morris	(123)456-7890	No
<input type="checkbox"/>	12292.0	Controls Supply Company			1101 West Breen Avenue	Kingsford	MI	Mr. Rex Dean	(123)456-7890	No

 Save & Exit

 Save & Continue

 Save & Next Page

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1 2 3 4 5

 Find Vendors for All Commodity Codes on the Bid

Your vendor search results will appear below the search area. To select a vendor to add to your Bidders list, select the check box next to the vendor in the **Select** column. To select all of the vendors on that screen, select the check box in the top row in the **Select** column. Once you've made your selections, click one of the **Save** options.

If more than 25 vendors were returned as a result of your search, they will appear on different pages. Directly above and below the results list, the total number of results is displayed along with links to each page of results. You can only add vendors to your Bidders list that appear on the screen you are currently viewing, so if you need to add vendors across pages of results, you will need to select the **Save & Next Page** button that appears on the bottom of the screen. This will add your vendor selections on the current screen to the Bidders list, and then take you to the next page of vendors so you can add them as well.

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General Items Address Accounting Routing Attachments(2) Notes(1) **Bidders** Questions Amendments Q & A Reminders Summary

General Subcontractors Quote Activity

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

Delete	Vendor ID	Vendor Name	Vendor Address	Preferred Delivery Method
<input type="checkbox"/>	24893.0	Carrier Corporation	Bid Mailing Address: Add New Address General Mailing Address - Mr. Anthony Thompson 400 76th Street SW ... 400 76th Street SW Suite 14 Byron Center, MI 49315.0 US	Email
<input type="checkbox"/>	33067.0	Brooklyn Plumbing, Heating, & Air Conditioning Inc	Bid Mailing Address: Add New Address General Mailing Address - Mr. Chad Hagerty P.O. Box 225 4017 Jeffe... P.O. Box 225 4017 Jefferson Rd. Clarklake, MI 49234.0 US	Email

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After selecting one of the **Exit** options from the vendor search screen, the pop-up window will close and the Bidders tab of your Bid will update to display a list of the vendors you selected. You can view the profile of any added vendor by clicking the link in the **Vendor ID** column. Note that you can delete any vendor you've added by clicking the check box in the **Delete** column next to the vendor and selecting **Save & Continue** on the bottom of the screen.

You can also conduct another search to add additional vendors to your bidders list by selecting **Lookup & Add Vendors** again on the bottom of the screen. Note that Buy4Michigan does not support the ability to notify newspapers regarding a solicitation, therefore seek the guidance of your agency's Chief Procurement Officer in order to determine how to go about this process.

Open Market Bid AGENCY1TEST13B0000690 Status: 281 - In Progress

[General](#) [Items](#) [Address](#) [Accounting](#) [Routing](#) [Attachments\(2\)](#) [Notes\(1\)](#) **[Bidders](#)** [Questions](#) [Amendments](#) [Q & A](#) [Reminders](#) [Summary](#)

[General](#) **[Subcontractors](#)** [Quote Activity](#)

Designate the need for subcontractors and the type preferred by vendor category:

Subcontractors must be certified in at least 1 bid item NIGP code:

Subcontractors must acknowledge inclusion:

Hours from bid closing for subcontractors to acknowledge inclusion:

Delete	Vendor Category	Mandatory	Category Certified Vendors Only	Target %
<input type="checkbox"/>	<input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="0.0"/>

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If you expect that subcontractors may be utilized by offerors, or you require specific subcontractor participation to award the solicitation to a vendor, you can set rules regarding subcontractor participation via the Subcontractor sub-tab within the Bidders tab. The text box on the top of this tab allows you to type in any requirements regarding the use of subcontractors. This information should also be included in the formal documentation attached to the Bid.

Other options on this tab allow you to mandate that the vendors identified by the offeror as subcontractors are registered with at least one of the commodity codes selected for the items on your Bid, that those subcontractors must login to Buy4Michigan to acknowledge their inclusion in the response, and that they must acknowledge that inclusion a certain time period prior to the closing of the solicitation's response period. Note that offerors will only be able to select vendors as subcontractors that are registered within Buy4Michigan. The final section allows you to recommend or mandate specific types of vendors be included as subcontractors by selecting **Vendor Categories** that vendors are asked to associate with upon registering with Buy4Michigan. However, since the options setup by the State within these categories allow vendors to select a "not applicable" option, selecting a **Vendor Category** here will not ensure that a subcontractor belongs in a specific category (e.g. minority-owned, small, or women-owned business). In fact, all vendors are required to provide an answer in all options when registering, so selecting a **Vendor Category** will not restrict any vendor from being chosen as a potential subcontractor by an offeror. However, Buy4Michigan

requires at least one Vendor Category be designated here in order to enable vendors to select their intended subcontractors on their Quote response, **so if you want responses to contain offeror's intended subcontractors, then you must select at least one.** Furthermore, since the State does not certify vendor's selection within these **Vendor Categories**, do NOT select the **Category Certified Vendors Only** check box. This will have the effect of excluding all vendors from being selected as subcontractors. The **Target %** option allows you to recommend that subcontractors receive a certain percentage of the total dollar amount of the offeror's quoted price. Checking the **Mandatory** option will make it required that vendors receive this percentage.

Q & A Tab

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Status: 2BI - In Progress

General Items Address Accounting Routing Attachments(2) Notes(1) Bidders Questions Amendments **Q & A** Reminders Summary

Question #	Created Date	User Created	Question Subject	Question	Answer	Show on Web	Show Original Vendor Only	Delete
Add New:			<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>		

Allow vendor to submit questions

Send notification when vendor submitting question

Save & Continue

Reset

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Prior to publishing your solicitation, you can select options to enable vendors to submit their questions through Buy4Michigan once the solicitation is published. These questions will appear on the Q & A tab and allow you to respond through Buy4Michigan. Buy4Michigan enables you to document these questions and provide answers via the Q & A tab on the Bid. Vendors and the public can then access this Q & A by viewing the Bid document.

Reminders Tab

Reminders Tab

Open Market Bid AGENCY1TEST13B0000690

Status: ZBI - In Progress

General Items Address Accounting Routing Attachments(2) Notes(1) Bidders Questions Amendments Q & A **Reminders** Summary

Due Date* (MM/DD/YYYY)	Comment* (max 250 characters)	Remind Whom*	Days Prior to Remind*	Date Completed (MM/DD/YYYY)	Send Email	Date Entered	Entered By
07/15/2013	Turn off Q&A	Trainee10, Buyspeed	0		<input checked="" type="checkbox"/>		

Save & Continue

Reset

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The Reminders tab can be used to have Buy4Michigan send you emails to remind you to turn off the Q&A session or other tasks. Just enter the fields and check the box **Send Email**. Click on **Save & Continue**.

Reminders Tab

Open Market Bid AGENCY1TEST13B0000690 Status: 2BI - In Progress

General Items Address Accounting Routing Attachments(2) Notes(1) Bidders Questions Amendments Q & A **Reminders(1)** Summary

Due Date* (MM/DD/YYYY)	Comment* (max 250 characters)	Remind Whom*	Days Prior to Remind*	Date Completed (MM/DD/YYYY)	Send Email	Date Entered	Entered By	Delete
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="checkbox"/>			<input type="checkbox"/>
07/15/2013	Turn off Q&A	Trainee10. Buyspeed	<input type="text" value="0"/>	<input type="text"/>	<input checked="" type="checkbox"/>	07/02/2013 11:26:07 AM	Buyspeed Trainee10	<input type="checkbox"/>

i Please save your changes before sorting table. Otherwise, your changes will be lost.

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Upon clicking **Save & Continue**, it shows the reminder that was entered and gives another line to enter another one if desired. When the task is completed, go in to this tab and enter the Date Completed and save. This will remove the task from your **My Reminders** tab on the **Home** tab.

Summary Tab

Summary Tab - Approval

Open Market Bid AGENCY1TEST13B0000690
Status: 2BI - In Progress

General
Items
Address
Accounting
Routing
Attachments(2)
Notes(1)
Bidders
Questions
Amendments
Q & A
Reminders(1)
Summary

Header Information

Bid Number:	AGENCY1TEST13B0000690	Description:	Furnace and filters	Status:	2BI - In Progress
Purchaser:	Buyspeed Trainee10	Minor Status:		How Solicited:	Email
Organization:	Department of Technology Management and Budget	Department:	1TEST - Testing	Location:	321 - office
Fiscal Year:	13	Allow Electronic Quote:	Yes	Required Date:	
Show On Web:	Yes	Available Date:	07/02/2013 08:27:00 AM		
Bid Opening Date:	07/16/2013 03:00:00 PM				
Purge Date:					
Bid Type:	Open Bid	Informal Bid:	No		
Control Code:		Estimated Cost:	\$0.00	Print Dest Detail:	
Alternate ID:	ITRAC #	Purchase Method:	Open Market	Catalog Id (for contract):	
Blanket/Contract Begin Date:		Blanket/Contract End Date:		Type Code:	IB - Invitation To Bid (TB)
Info Contact:		Bulletin Desc:		Pre-Bid Conference:	
NIGP Code Certified Required:	No	Acknowledge inclusion required:	No	Hour of Acknowledge inclusion:	0.0

Submit for Approval
Cancel Bid
Clone Bid
Print

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Once you have completed each of the necessary tabs, you can review all of the info you've entered on the Summary tab. If there are any issues with the info you've provided, validation warnings and/or errors will display along the top of the Summary tab. Yellow warnings do not require action on your part, but red errors require that you fix the issue before you are allowed to submit the Bid for approval. Once you have corrected any issues and are ready to publish the solicitation, you can submit your Bid document for approval by clicking the **Submit for Approval** button on the bottom of the tab. Note that you can also print a paper copy of the Bid document by clicking the **Print** button. This will display a pop-up window with the printed version of the information you've input on your Bid. To the State, this printed document represents the cover page to the entire solicitation, the rest of which should be present in the documents you've attached to the Bid. If asked to produce all solicitation documentation, this printed document should appear on top of the documents attached to the Bid, (which must be printed separately) in their designated order of precedence.

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BuyMichigan

Submit for Approval

Open Market Bid AGENCY1TEST13B0000690 Status: 2BI - In Progress

No approval path meets the document criteria. Do you want to manually add approvers or mark the document as approved?

Manually add approvers
 Automatic approval

Please select an approver if you want to manually add approvers.

Approver

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Open Market Bid AGENCY1TEST13B0000690 Status: 2BI - In Progress

No approval path meets the document criteria. Do you want to manually add approvers or mark the document as approved?

Manually add approvers
 Automatic approval

Please select an approver if you want to manually add approvers.

Approver

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Upon clicking **Submit for Approval**, the approval path that's been triggered by the document will appear. This displays the users that must approve the document before it can be published and in what order. Upon clicking **Continue**, the approvers will be notified once it is their turn to approve. Approvers can only approve/disapprove the Bid in the order they are listed on the approval path. If no approval path is triggered by the document, you can manually add approvers to the document by selecting a user in the **Approver** dropdown and clicking the **Add Approver** button. Once you are ready to notify the approvers, click **Save & Continue**. You will also be given the option to select **Automatic Approval**. Selecting this option automatically approves the document, allowing you to immediately publish the solicitation. Note again - only Basic Purchasing users can create or send Bids.

Open Market Bid AGENCY1 TEST13B0000690 Status: 2BR - Ready to Send

General Items Address Accounting Routing Attachments(2) Notes(1) Bidders Questions Amendments Q & A Reminders(1) **Summary**

Header Information

Bid Number:	AGENCY1TEST13B0000690	Description:	Furnace and filters	Status:	2BR - Ready to Send
Purchaser:	Buyspeed Trainee10	Minor Status:		How Solicited:	Email
Organization:	Department of Technology Management and Budget	Department:	1TEST - Testing	Location:	321 - office
Fiscal Year:	13	Allow Electronic Quote:	Yes	Required Date:	
Show On Web:	Yes	Available Date:	07/02/2013 11:58:00 AM		
Bid Opening Date:	07/16/2013 01:15:00 PM				

Send Bid Actions

Option 1 Change bid status to "Sent" and notify vendors Change bid status to "Sent" only.

Send Bid

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To publish the solicitation, navigate to the Summary tab of the "Ready to Send" status Bid. On the bottom of the screen, you are presented with two options in the **Send Bid Actions** section. You can either select to **Change bid status to "Sent" and Notify Vendors**, which will publish the solicitation and send an email to all of the vendors added on the Bidders tab, or to **Change bid status to "Sent" only**, which will publish the solicitation, allowing vendors to access and respond, but will not send vendors an email to notify them. After you've made your selection, select **Send Bid**. The Bid is now in "Sent" status.

Vendor Notification Result

Subject: Bid Notification - Bid # AGENCY1TEST13B0000690, Furnace and filters

Email Recipients

Delivery Date: 07/02/2013 12:11:06 PM

Vendor ID	Vendor Name	Email Address
33067.0	Brooklyn Plumbing, Heating, & Air Conditioning Inc	Mr. Chad Hagerty (test@periscopeholdings.com)
24693.0	Carrier Corporation	Mr. Anthony Thompson (test@periscopeholdings.com)

OK

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If you selected to notify the vendors, after saving, the **Vendor Notification Result** screen will display all of the vendors that were notified and the email address that the notification was sent to. This screen is not accessible again after clicking **OK**, so if it is needed for your records, you may wish to print this screen using your web browser. Note that even after sending a Bid, it will not be viewable online or allow response until the **Available Date** identified on the General tab of the Bid has been reached.

Open Market Bid AGENCY1TEST13B0000690

Status: 2BS - Sent

General Items Address Accounting Routing Attachments(2) Notes(1) Bidders Questions Amendments Q & A Reminders(1) **Summary**

Header Information

Bid Number:	AGENCY1TEST13B0000690	Description:	Furnace and filters	Status:	2BS - Sent
Purchaser:	Buyspeed Trainee10	Minor Status:		How Solicited:	Email
Organization:	Department of Technology Management and Budget				
Fiscal Year:	13	Department:	1TEST - Testing	Location:	321 - office
Show On Web:	Yes	Allow Electronic Quote:	Yes	Required Date:	
Bid Opening Date:	07/16/2013 01:15:00 PM	Available Date:	07/02/2013 11:58:00 AM		
Purge Date:					
Bid Type:	Open Bid	Informal Bid:	No		
Control Code:		Estimated Cost:	\$0.00	Print Dest Detail:	
Alternate ID:	ITRAC #	Purchase Method:	Open Market	Catalog Id (for contract):	
Blanket/Contract Begin Date:		Blanket/Contract End Date:		Type Code:	IB - Invitation To Bid (ITB)
Info Contact:		Bulletin Desc:		Pre-Bid Conference:	
NIGP Code Certified Required: No		Acknowledge inclusion required: No		Hour of Acknowledge inclusion: 0.0	

After clicking **Ok** on the Vendor Notification screen you will return to the Header screen. The Bid will now be in **“Sent”** status.

Bid Opening & Award

Home - Welcome Back Buyspeed Trainee10

[News\(1\)](#) | [Dashboard](#) | [Reqs\(0\)](#) | [Bids\(95\)](#) | [PO\(9\)](#) | [Approval\(1\)](#) | [My Reminders\(3\)](#) | [Events\(0\)](#)
[In Progress\(7\)](#) | [Ready for Approval\(1\)](#) | [Ready to Send\(0\)](#) | [Ready to Open\(85\)](#) | [Opened\(2\)](#) | [Approved\(0\)](#)

Bid #	Buyer	Description	Bid Opening Date	Open Quotes	Quote History
AGENCY1TEST13B0000375	Buyspeed Trainee04	Student Loan Servicing	05/29/2013 03:00:00 PM	Create new quote	No Submitted Quotes
AGENCY1TEST13B0000424	Buyspeed Trainee17	Lab Equipment	05/24/2013 10:29:00 AM	Create new quote	No Submitted Quotes
AGENCY1TEST13B0000431	Buyspeed Trainee14	Consulting Services	05/28/2013 08:33:00 AM	Create new quote	No Submitted Quotes
AGENCY1TEST13B0000435	Thomas Clayton	NIGP test	05/23/2013 09:12:00 AM	Create new quote	No Submitted Quotes
AGENCY1TEST13B0000462	Buyspeed Trainee05	food	05/24/2013 08:00:00 AM	Create new quote	No Submitted Quotes

[View More...](#)

Bids Ready To Open

[Bid\(85\)](#)

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1 2 3 4

Bid #	Buyer	Description	Bid Opening Date	Open Quotes	Quote History
AGENCY1TEST13B0000375	Buyspeed Trainee04	Student Loan Servicing	05/29/2013 03:00:00 PM	Create new quote	No Submitted Quotes
AGENCY1TEST13B0000424	Buyspeed Trainee17	Lab Equipment	05/24/2013 10:29:00 AM	Create new quote	No Submitted Quotes
AGENCY1TEST13B0000431	Buyspeed Trainee14	Consulting Services	05/28/2013 08:33:00 AM	Create new quote	No Submitted Quotes
AGENCY1TEST13B0000435	Thomas Clayton	NIGP test	05/23/2013 09:12:00 AM	Create new quote	No Submitted Quotes
AGENCY1TEST13B0000462	Buyspeed Trainee05	food	05/24/2013 08:00:00 AM	Create new quote	No Submitted Quotes
AGENCY1TEST13B0000500	Paula Hurst Thomas	Test Bid	05/29/2013 09:01:00 AM	Create new quote	No Submitted Quotes
AGENCY1TEST13B0000515	Buyspeed Trainee09	computers & printers	05/30/2013 03:15:00 PM	Create new quote	No Submitted Quotes
AGENCY1TEST13B0000527	Brandon Samuel	test services	06/04/2013 03:00:00 PM	Create new quote	No Submitted Quotes
AGENCY1TEST13B0000601	Buyspeed Trainee10	Road work	06/06/2013 09:00:00 PM	Create new quote	No Submitted Quotes
AGENCY1TEST13B0000614	Buyspeed Trainee05	New Road Sweeper	06/14/2013 12:00:00 PM	Open Bid	No Submitted Quotes
AGENCY1TEST13B0000690	Buyspeed Trainee10	Furnace and filters	07/16/2013 03:00:00 PM	Open Bid	No Submitted Quotes

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Prior to opening your Bid, you will want to verify that responses have been received from vendors so that you will have something to review, evaluate and award. Once the Bid Opening Date/Time has been reached, your Bid will once again be accessible via the Bids tab on your Home page within the **Ready to Open** sub-tab. It can also be accessed from the Documents dropdown menu in the Navigation bar by going to either Bids -> Sent or Bids -> Ready to Open. If responses have been received, an **Open Bid** link will appear in the **Open Quotes** column next to the Bid. If no responses have been received a **Create Quote** link will appear in this column, allowing you to enter Quotes you may have received offline. If no responses have been received, you may wish to create an amendment extending the response period by pushing back the Bid Opening Date. Otherwise, you may wish to cancel the Bid.

Note: Purchasers cannot manually add Quotes on behalf of the vendor until the Opening Date time has been reached.

Once you are ready to Open your Bid, clicking the **Open Bid** link will take you to the Summary tab of your now "Opened" Bid. If you navigate to the Bid without opening it, the Bid can also be opened from the Summary tab by clicking the **Open Bid** button along the bottom of the screen.

Open Market Bid AGENCY1TEST13B0000690

Status: 2BO - Opened

General Items Address Accounting Routing Attachments(2) Notes(1) Bidders Questions Amendments Q & A Reminders(1) Summary

Header Information

Bid Number: AGENCY1TEST13B0000690 **Description:** Furnace and filters **Status:** 2BO - Opened
Purchaser: Buyspeed Trainee10 **Minor Status:** **How Solicited:** Email
Organization: Department of Technology Management and Budget
Fiscal Year: 13 **Department:** 1TEST - Testing **Location:** 321 - office
Show On Web: Yes **Allow Electronic Quote:** Yes **Required Date:**
Bid Opening Date: 07/16/2013 01:15:00 PM **Available Date:** 07/02/2013 11:58:00 AM

Attachments: [Standard Terms and Conditions-5-7-2013](#), [Trane Image-13.jpg](#)

Bidders:

Vendor Id	Vendor Name	Preferred Delivery Method	Notifications	Responded
24693.0	Carrier Corporation	Email	Bid Available: Emailed to test@periscopeholdings.com at 07/02/2013 11:11:2 AM	Yes
33067.0	Brooklyn Plumbing, Heating, & Air Conditioning Inc	Email	Bid Available: Emailed to test@periscopeholdings.com at 07/02/2013 11:11:21 AM	Yes

Bid Tab

Cancel Bid

Clone Bid

View Quote History

Print

Once “Opened,” you can access the Bid Tabulation (Bid Tab) document and the Quote History for the Bid. From the Bid Tab, you can view the submitted Quotes and begin your evaluation and award process. The Quote History screen just allows you to view the submitted Quotes.

Buy4Michigan

Bid Tab and Quote History

Buttons: Bid Tab, Cancel Bid, Clone Bid, View Quote History, Print

Bid Tabulation for Bid #AGENCY1TEST13B0000690

Quotes | Revisions | Items | Header Questions | Subcontractors | Routing | Attachments | Score | Summary | [Back to Bid](#)

Total Number of Submitted Quotes: 2

Quote #	Description	Vendor ID	Vendor Name	Submit Date	View Quote
00000606	Furnace and filters	33067.0	Brooklyn Plumbing, Heating, & Air Conditioning Inc	07/08/2013 12:19:34 PM	View Quote
00000607	Furnace and filters	24693.0	Carrier Corporation	07/11/2013 12:20:49 PM	View Quote

[Create New Quote](#)

Quote History - Bid # AGENCY1TEST13B0000690 [Back to Bid](#)

Header Information

Bid Number: AGENCY1TEST13B0000690 **Description:** Furnace and filters **Bid Opening Date:** 07/16/2013 03:00:00 PM

Quote History

Quote #	Vendor ID	Vendor Name	Date Submitted	Total Cost
<input type="checkbox"/> 00000607	24693.0	Carrier Corporation	07/11/2013 12:20:49 PM	\$12,868.00
<input type="checkbox"/> 00000606	33067.0	Brooklyn Plumbing, Heating, & Air Conditioning Inc	07/08/2013 12:19:34 PM	\$12,672.00

[Exit](#)

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The Bid Tab, like all documents within Buy4Michigan, is completed by working through a series of tabs, then reviewing all of the information you've entered on the Summary tab before submitting the document. The tabs on the Bid Tabulation enable you to compare Quotes, both in their entirety and specific elements, request revisions to Quotes, conduct an evaluation, attach files and recommend award.

Along with the **Bid Tab** button, a **View Quote History** button will appear along the bottom of "Opened" Bids if Quotes were submitted. Clicking **View Quote History** will display a list of all submitted Quotes. You can view the Quote by clicking the link in the **Quote #** column. You can also quickly view the price quotes for each item on the Quote by clicking the **Expand** icon next to the link in the **Quote #** column.

Quote Header Information - Top

Quote 0000606 - Brooklyn Plumbing, Heating, & Air Conditioning Inc

General Items Questions Subcontractors Terms & Conditions Attachments Evaluations Preference Reminders **Summary**

Header Information

Quote #:	0000606	Bid #:	AGENCY1TEST13B0000690	Status:	Submitted
Organization:	Department of Technology Management and Budget				
Description:	Furnace and filters	Delivery Days:	0	Discount Percent:	0.0
Bid Flag:	Yes	Alternate Bid:	No	Shipping Terms:	
Freight Terms:		Ship Via Terms:		Payment Term:	
Promised Date		Info Contact:		Quote Total	\$12,672.00
Comment:					
Date Last Updated:	07/08/2013 12:19:34 PM	User last Updated:	Jane Doe	User Created:	Jane Doe
Print format:					
	Vendor accepts the terms & conditions with no exceptions.				

Another potentially important piece of information available only by looking at each vendor's Quote is whether they acknowledged viewing every amendment applied to the Bid. On the Summary tab of Quotes, the **Bid Acknowledgements** field displays when the vendor acknowledged each amendment. A yellow validation warning will appear on the top of the Summary tab if the vendor did not acknowledge all amendments.

This warning does not drive any system functions and is intended solely to provide you with information regarding the Quote.

Quote Header Information - Bottom

Item Information

Print Sequence # 1.0 : (031 - 51) Name brand furnace, 100,000 btu, two stage, natural gas, installation included.

Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge
1.0	EA	\$12,600.00	0.0%	0.0%	\$0.00	\$12,600.00	No	No

This product was manufactured within the United States and the cost of domestic components exceeds 50% of all components.: No

Item Questions:

Question #	Required	Question	Response
1	Yes	Is it high efficiency?	Yes

Print Sequence # 2.0 : (031 - 45) Furnace filters for item 1.

Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge
2.0	EA	\$36.00	0.0%	0.0%	\$0.00	\$72.00	No	No

This product was manufactured within the United States and the cost of domestic components exceeds 50% of all components.: No

Print Close Window

At the bottom of the Header page it will show how the vendor answered the Item questions. When finished viewing, click on **Close Window**.

Bid Tabulation for Bid #AGENCY1TEST13B0000690

[Quotes](#) [Revisions](#) [Items](#) [Header Questions](#) [Subcontractors](#) [Routing](#) [Attachments](#) [Score](#) [Summary](#) [Back to Bid](#)

Total Number of Submitted Quotes: 2

Quote #	Description	Vendor ID	Vendor Name	Submit Date	View Quote
0000606	Furnace and filters	33067.0	Brooklyn Plumbing, Heating, & Air Conditioning Inc	07/08/2013 12:19:34 PM	View Quote
0000607	Furnace and filters	24693.0	Carrier Corporation	07/11/2013 12:20:49 PM	View Quote

[Create New Quote](#)

The first tab on the Bid Tab is the Quotes tab, which displays all of the Quotes that were received in response to the Bid. If you request a revision to a Quote, and one is submitted, the revised Quote will take the place of the original in this list. Click on the link in the **Quote #** column to open a pop-up window displaying that specific Quote. Selecting the **View Quote** link on the far right will open the Quote in the same screen, rather than as a pop-up. All of the tabs available to the vendor when completing the Quote are visible, except the Notes tab. The most important info to review while viewing a vendors Quote is their attachments and their response to the Terms & Conditions. While other areas of the Bid Tab allow you to view and compare every vendor's quoted pricing by item, as well as their answers to the questions you posed on the Bid, a vendor's attachments and Terms & Conditions response can only be viewed by looking at their Quote document. Once you verify the Quotes that have been received are complete, proceed to the Items tab to begin comparing the Quotes.

Items Tab - Comparing Quotes

Bid Tabulation for Bid #AGENCY1TEST13B0000690

Quotes Revisions **Items** Header Questions Subcontractors Routing Attachments Score Summary [Back to Bid](#)

Bid Award Validation Warnings

* The following items are not awarded:[1,2]

of Quotes per page: 5 Sort by: Quote Total Ascending Go

Total Item Count: 2 Total Awardable Quote Count: 2 Bid Status: 2B0 - Bid Opened (Quotes received and opened. Ready for tabulation)

Please make sure that you save your changes before you navigate to another page.

Cancel	Item info/Quote info	Vendors
<input type="checkbox"/>	Name brand furnace, 100,000 btu, two stage, natural gas, installation included. Item #:1 Print Sequence:1.0 Status:2B0 - Opened Quantity:1.0 Uom:EA Item Questions	(33067.0)Brooklyn Plumbing, Heating, & Air Conditioning Inc <Quote: 00000606>
<input type="checkbox"/>	Furnace filters for item 1. Item #:2 Print Sequence:2.0 Status:2B0 - Opened Quantity:2.0 Uom:EA	(24693.0)Carrier Corporation <Quote: 00000607>
Totals: \$Vendor Gross Total:		\$12,600.00
\$ Vendor Discount:		**
\$ Vendor Net Total:		\$12,600.00
\$ Preference Discount:		Discount: 0%
\$ Evaluation Total:		\$36.00
\$ Vendor Freight:		Discount: 0%
\$ Awarded:		\$34.00
Eval Codes:		**
Pref Codes:		**
Award/Unaward All:		Award All Unaward All

Item description, status and Unit of measure

Award individual item

Award All Unaward All

Cancel Items Save & Continue

Evaluation Code Descriptions:
*** Lowest Item Price or Lowest Evaluation Quote Total

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Each item on the Bid is listed with the price by vendor. You can sort and organize the list to enable different comparisons as needed.

Note that this is also the tab where you are able to recommend award. Under the vendor check the boxes for each item you want to award to them. The award can be to one vendor or split between multiple vendors.

BuyMichigan

Attachments Tab

Bid Tabulation for Bid #AGENCY1TEST13B0000690

Quotes Revisions Items Header Questions Subcontractors Routing **Attachments** Score Summary [Back to Bid](#)

Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Click Add Attachment to add attachments.

No Attachments

[Add Attachment](#)

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Add File

Name is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters, spaces, and special characters up to a maximum length of 200.

Name*: AGENCY PROTEST NOTIFICATION ATTACHM

Description:

File*: S:\Training\Buy4Michigan\AGENCY PROTEST NOTIFIK [Browse...](#)

Location: agency

[Save & Exit](#) [Save & Continue](#) [Reset](#) [Cancel & Exit](#)

Bid Tabulation for Bid #AGENCY1TEST13B0000690

Quotes Revisions Items Header Questions Subcontractors Routing **Attachments(1)** Score Summary [Back to Bid](#)

Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Name	Description	Show Vendor	Confidential	Attached By	Attached Date	Delete
AGENCY PROTEST NOTIFICATION ATTACHMENT 6-7-2013-10.DOC		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Buyspeed Trainee10	07/17/2013	<input type="checkbox"/>

[Save & Continue](#) [Add Attachment](#)

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The solicitation award process is almost complete. The next step is to go to the Attachments tab to attach the Agency protest letter to the Bid document. This lets the vendors know their rights regarding protest of the award. This is a required step in the Bid award process.

Award Recommendation - Interim Approval

Bid Tabulation for Bid #AGENCY1TEST13B0000690

[Quotes](#)
[Revisions](#)
[Items](#)
[Header Questions](#)
[Subcontractors](#)
[Routing](#)
[Attachments\(1\)](#)
[Score](#)
[Summary](#)
[Back to Bid](#)

Bid Tabulation Information

Attachments: [AGENCY PROTEST NOTIFICATION ATTACHMENT 6-7-2013-10.DOC](#)

Total Item Count: 2 Total Awarded Quote Count: 1 Bid Status: 2BO - Bid Opened (Quotes received and opened. Ready for tabulation)

Canceled	Item info/Quote info	
	(33067.0)Brooklyn Plumbing, Heating, & Air Conditioning Inc <Quote: 00000606>	
	Name brand furnace, 100,000 btu, two stage, natural gas, installation included. Item #:1 Print Sequence:1.0 Status:2BO - Opened Quantity:1.0 Uom:EA Item Questions	<input checked="" type="checkbox"/> \$12,600.00 ** Discount: 0%
	Furnace filters for item 1. Item #:2 Print Sequence:2.0 Status:2BO - Opened Quantity:2.0 Uom:EA	<input checked="" type="checkbox"/> \$36.00 Discount: 0%
	Totals: \$ Vendor Gross Total: \$ Vendor Discount: \$ Vendor Net Total: \$ Preference Discount: \$ Evaluation Total: \$ Vendor Freight: \$ Awarded:	\$12,672.00 \$0.00 \$12,672.00 \$0.00 ** \$12,672.00 \$0.00 \$12,672.00
	Eval Codes:	
	Pref Codes:	

Evaluation Code Descriptions:
 ** = Low Item Price

The Bid award process is almost complete. The next step is to submit your award recommendation(s) for approval. On the Summary tab of the Bid Tabulation you can review your award recommendations before selecting **Submit for Approval**.

While the approvals necessary for your recommendation may be different, the approval process that follows is the same as when you submitted your Bid for approval to be published.

Award Recommendation - Interim Approval

Open Market Bid AGENCY1TEST13B0000690 Status: ZBO - Opened

No approval path meets the document criteria. Do you want to manually add approvers or mark the document as approved?

Manually add approvers

Automatic approval

Please select an approver if you want to manually add approvers.

Approver

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Now it is time to “approve” the award recommendation. Since protest periods and any external (Ad Board, Natural Resources, Civil Service Commission, etc.) approvals will still occur in ADPICS in Phase 1, and since only converting a Bid to PO(s) will allow vendors to see the Bid Tab and associated recommendation / protest information, typically, the Buyer submitting the evaluated Bid tab for approval will simply Automatically approve the Bid tab (recommendation). This constitutes the buyer’s recommendation based on a completed evaluation process.



Award Recommendation - Vendor Notification

This notification includes the recommendation results for the referenced solicitation. Information and instructions regarding debrief, appeal, and approval steps are included if applicable, in the attachment on the Bid Tab.

Bid#AGENCY1TEST13B0000690 has been recommended for award
The following vendor(s) have been recommended for award of all or part of the bid:

Brooklyn Plumbing, Heating & Air Conditioning Inc

Thank you for your participation

Use this link to log on to Buy4Michigan: <https://buyspeed.com/bsol/login.sdo>

Once award of the Bid has been approved, you and all the vendors that submitted Quotes will be notified via an email listing the awarding vendors.

Award Recommendation - Convert to In-Progress PO

Bid Tabulation for Bid #AGENCY1TEST13B0000690

Quotes Revisions Items Header Questions Subcontractors Routing Attachments(1) Score Summary Back to Bid

Bid Tabulation Information

Attachments: [AGENCY PROTEST NOTIFICATION ATTACHMENT 6-7-2013--10.DOC](#)

Total Item Count: 2 **Total Awarded Quote Count:** 1 **Bid Status:** 2BA - Bid Approved (Ready for Vendor Awarding)

Canceled	Item info/Quote info	(33067.0)Brooklyn Plumbing, Heating, & Air Conditioning Inc <Quote: 00000690>
	Name brand furnace, 100,000 btu, two stage, natural gas, installation included. Item #.1 Print Sequence:1.0 Status:2BA - Approved Quantity:1.0 Uom:EA Item Questions	<input checked="" type="checkbox"/> \$12,600.00 ** Discount: 0%
	Furnace filters for item 1. Item #.2 Print Sequence:2.0 Status:2BA - Approved Quantity:2.0 Uom:EA	<input checked="" type="checkbox"/> \$36.00 Discount: 0%
	Totals: \$Vendor Gross Total:	\$12,672.00
	\$ Vendor Discount:	\$0.00
	\$ Vendor Net Total:	\$12,672.00
	\$ Preference Discount:	\$0.00
	\$ Evaluation Total:	** \$12,672.00
	\$ Vendor Freight:	\$0.00
	\$ Awarded:	\$12,672.00
	Eval Codes:	
	Pref Codes:	

Evaluation Code Descriptions:
 ** = Low Item Price

Create PO Print

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Once your award recommendation has been approved, from the Summary tab of the Bid Tab you are able to create the resulting in-progress (draft) PO(s) by clicking the **Create PO** button on the bottom of the screen. Again, this step is necessary to facilitate the protest period because until a PO has been created from the Bid Tab for all items (except any that may have been canceled during the evaluation process), vendors cannot see the Bid tab, which is their basis for potential protests. Print and attach the Bid Tab and necessary information to a document in ADPICS and submit it for any external approvals (Ad Board, Civil Service Commission, etc.) at this time so that the protest period and their review of the award recommendation begin simultaneously.

Bid AGENCY1TEST13B0000690 - Purchase Order Creation Preview

1 purchase order will be created for the following quote:

Quote #	Vendor ID	Vendor Name	Total Awarded
00000606	33067.0	Brooklyn Plumbing, Heating, & Air Conditioning Inc	\$12,672.00

Purchase order creation options:

- Include Narrative Items
- Include Bid Attachments
- Include Bid Tab Attachments
- Include Bid Notes
- Include Quote Subcontractors
- Include Vendor Quote Attachments

Click 'Continue' button to create PO or click 'Cancel & Exit' button to cancel the PO creation and return to the bid tabulation summary page.

Open Market Bid AGENCY1TEST13B0000690 - Purchase Order(s) Created Status: 2BPO - Bid to PO

The following Purchase Order(s) were created:

PO #	Vendor ID	Vendor Name	Total	Date Created	Status
AGENCY1TEST13P00000344	33067.0	Brooklyn Plumbing, Heating, & Air Conditioning Inc	\$12,672.00	07/17/2013	3PI - In Progress

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Upon selecting **Create PO**, the **Purchase Order Creation Preview** screen will appear for the Bid that was awarded. A list of the vendor Quotes that were awarded will appear. A different PO will be created for each different vendor that was awarded at least one Bid item. Below, a list of **Purchase order creation options** appears. These options, when checked, will bring information from either the Bid, or the vendors' Quotes to their corresponding PO. These options are all automatically checked.

Note that you will be able to edit the resulting PO, including the PO type, as needed after you've created it, including being able to delete any of this information that is brought over from the Bid. Leave the PO in "in progress" status until all award recommendation approvals and protest period have ended. Once you're ready to create the PO(s), click the **Continue** button. Doing so will display a screen listing the POs that were created. Click a link in the **PO#** field to view that PO. Clicking **OK** at the bottom of the screen will return you to your Home page.

Overview - What is a Purchase Order?

Purchase Order documents (POs) in Buy4Michigan allow users to communicate any agreement with a vendor to provide goods and/or services. The type of PO will determine whether the agreement is for a one-time purchase, a term contract, or an order against a term contract.

Orders against term contracts will NOT be managed in Buy4Michigan in Phase 1. Orders, encumbrances, receiving, payments, etc. will still be managed in existing SOM systems until Phase 2.

POs are completed by indicating the type of PO and the vendor, and adding the items that represent the good/services to be provided. For term contracts, the entities that will be allowed to place orders against them (done using current process), and the terms of the contracts must also be designated.

In Phase 1, only contracts resulting from Bids will be published in Buy4Michigan. All others (releases, POs that do not require competition, etc.) will continue to be processed in existing systems.

Overview - PO Documents

Document Type	Purpose	Created By
Purchase Order (PO)	<ul style="list-style-type: none"> Published to indicate initial award from a Bid to vendors Setup and manage term contracts that will be orderable in Phase 2 Types used in Phase 1 include Master Blanket (term contract or prequalified vendor list) or Open Market (one-time award), only those awarded from Bids managed in Buy4Michigan 	<ul style="list-style-type: none"> Basic Purchasing
Change Order	<ul style="list-style-type: none"> Manage contract amendments Access via Purchase Order 	<ul style="list-style-type: none"> Department Access (optional - create change orders only) Basic Purchasing (create or apply change orders)

Change orders can be used to correct errors or add attachments to Purchase Orders.

Also note that unlike Bids, all Basic Purchasing users from your agency will be able to access and edit POs with the same privileges as the creator of the document.

Overview - PO Statuses

Status Name	Meaning	Available Actions	Actions Permitted By
In Progress	The initial status of new documents. The document is still being completed by the creator.	<ul style="list-style-type: none"> Edit Submit for Approval Clone (creates a new copy of the document) Cancel 	<ul style="list-style-type: none"> Creator Authorized users
Ready for Approval	The document has been submitted for approval and is travelling down an approval path.	<ul style="list-style-type: none"> Approval/Disapproval Edit commodity code information Clone Cancel 	<ul style="list-style-type: none"> Current approver
Returned	The document was disapproved by an approver.	<ul style="list-style-type: none"> Reopen (returns document to "In Progress" status) Clone Cancel 	<ul style="list-style-type: none"> Creator Authorized users
Ready to Send	The document has been approved and is ready to be sent to a vendor or vendors.	<ul style="list-style-type: none"> Change Order (amendment) Send to vendor Clone Cancel 	<ul style="list-style-type: none"> Creator Authorized users
Sent	The document has been sent to the contractor . It is "active" if within the begin and end dates, enabling public visibility and ordering.	<ul style="list-style-type: none"> Change Order (amendment) Clone Cancel 	<ul style="list-style-type: none"> Creator Authorized users
Cancelled	The document has been cancelled.	<ul style="list-style-type: none"> Clone 	<ul style="list-style-type: none"> Creator Authorized users

As POs are processed, their status changes in order to allow/disallow various functions associated with the document. The table displays each possible status of a PO and what functions each status supports.

PO Creation Tabs

Open Market Purchase Order AGENCY1TEST13PI0000344 Status: 3PI - In Progress

General Items Vendor Address Accounting Routing Attachments(2) Notes(1) Change Orders Reminders Summary

PO Number: AGENCY1TEST13P00000344
Short Description*: Furnace and filters
Purchaser: Trainee10, Buyspeed
Fiscal Year: 2013
Department*: 1TEST - Testing
Location*: 321 - office
Type Code:
Entered Date: 07/17/2013 02:36:11 PM
Print Dest Detail: If Different
Required Date (MM/DD/YYYY):
Control Code:
Retainage %: 0.0
Contact Instructions:
Tax Rate:
ITRAC # :
ADPICS CS-138 # :
ADPICS Requisition # :
Date Last Updated: 07/17/2013 02:36:11 PM

Release: 0
Status: 3PI - In Progress
Receipt Method: Quantity
PO Type: Open Market
Organization: Department of Technology Management and Budget
Print Format: *
Alternate ID: ITRAC #
Promised Date (MM/DD/YYYY):
Days ARO: 0
Discount %: 0.0
Actual Cost: \$12,672.00
User last Updated: Buyspeed Trainee10

Save & Continue

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PO creation tabs are basically the same as the Bid. Most of the information will default from the Bid tabs.

Enter ADPICS PO, DPO or BPO number in the Alternate ID field

Open Market Purchase Order AGENCY1TEST13P0000344 Status: 3PI - In Progress

General | Items | Vendor | Address | Accounting | Routing | Attachments(2) | Notes(1) | Change Orders | Reminders | Summary

PO Number:	AGENCY1TEST13P0000344	Release:	0
Short Description*:	Furnace and filters	Status:	3PI - In Progress
Purchaser:	Trainee10, Buyspeed	Receipt Method:	Quantity
Fiscal Year:	2013	PO Type:	Open Market
Department*:	1TEST - Testing	Organization:	Department of Technology Management and Budget
Location*:	321 - office	Print Format*:	
Type Code:		Alternate ID:	071P3200462
Entered Date:	07/17/2013 02:36:11 PM	Printed Date (MM/DD/YYYY):	
Print Dest Detail:	If Different	Days ARO:	0
Required Date (MM/DD/YYYY):		Discount %:	0.0
Control Code:		Actual Cost:	\$12,672.00
Retainage %:	0.0	User last Updated:	Buyspeed Trainee10
Contact Instructions:			
Tax Rate:			
ITRAC #:	ITRAC #		
ADPICS CS-138 #:			
ADPICS Requisition #:			
Date Last Updated:	07/17/2013 02:36:11 PM		

Save & Continue

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The General tab of the PO document is where you describe the PO and define the type of contract it signifies (one-time Open Market or term Master Blanket). If the PO was created by awarding a Bid, this tab will be automatically completed, but is available to be edited. Copy /Paste the ITRAC # from the Alternate ID field to the ITRAC # field. **Create your BPO, PO or DPO in ADPICS and enter that number into the Alternate ID field on the General tab.** This will allow you to search for this document in Buy4Michigan using that number if needed for cross-referencing, and it will be used in Phase 2 to update POs in Buy4Michigan based on spending and changes made in ADPICS.



PO Creation - General Tab Standard Fields

Field	Description
Description*	Short description of the PO. 100 character limit.
Purchaser	The Basic Purchasing user that owns the document.
Receipt Method	The <u>Quantity</u> Receipt Method means that users will only be able to receive ordered contract items by the quantity that was delivered. This is the preferred method for commodities contracts. The <u>Dollar</u> Receipt Method means that users will only be able to receive ordered contract items by an invoiced dollar amount. This is the preferred method for services contracts. Note that the receipt method can also be set by individual item on the contract.
PO Type	The type of Purchase Order that is being created. For contracts, be sure you have selected <u>Blanket</u> .
Department / Location*	The business units that own the contract. Generally, these are the units that originally requested the items being contracted. These will automatically transfer from cloned documents and awarded Bids.
P-card Enabled	Selecting this check box will enable users ordering off of this contract in the system to utilize a P-card.
Type Code	Select whether the contract is a Single-agency, Multi-agency or Statewide contract.
Print Format*	The format of the PO that will print when selecting the Print button on the Summary tab. This can be changed while the PO is in any status.
Catalog	Catalogs enable organizing term contracts into groups. Users can then search for all contracts belonging to a specific catalog. Catalogs can be setup by Administrators.
Release Type	The <u>Standard Release</u> type means that orders against this contract must route through a Basic Purchasing user to be sent to the vendor. The <u>Direct Release</u> type means that orders against this contract can be sent to the vendor directly by the requestor following approval.
Alternate ID	The Alternate ID field enables agencies to identify the contract by an alternate number. Alternate ID is a search field available when using the Advanced Search feature. SOM agencies must enter the ADPICS PO BPO or DPO number here before finalizing the PO in BuySpeed.
Control Code	The Control Code field enables agencies to identify the contract by an alternate number. Control Code is NOT a search field available when using the Advanced Search feature.
Days ARO / Retainage % / Discount %	Optional fields for recording various contract terms.
Contact Instructions	Contact instructions for vendors and customers regarding the contract.
Tax Rate	If selected, the tax rate will automatically be applied to all items on the contract when ordered.

The standard fields on the General tab enable you to define the type of contract that is being developed, as well as how ordering and receiving against the contract will function. The table describes each of the standard fields you're likely to use each time you create a PO. Fields with an asterisk are required.



PO - Summary Tab

Open Market Purchase Order **AGENCY1TEST13P00000344** Status: 3PI - In Progress

General Items Vendor Address Accounting Routing Attachments(2) Notes(1) Change Orders Reminders **Summary**

Header Information

Purchase Order Number: AGENCY1TEST13P00000344 Release Number: 0 Short Description: Furnace and filters
Status: 3PI - In Progress Purchaser: Buyspeed Trainee10 Receipt Method: Quantity
Fiscal Year: 2013 PO Type: Open Market Minor Status:
Organization: Department of Technology Management and Budget Location: 321 - office Type Code:
Department: 1TEST - Testing Entered Date: 07/17/2013 02:36:11 PM Control Code:
Alternate ID: 071P3200462

Item Information

Print Sequence # 1.0, Item # 1: Name brand furnace, 100,000 btu, two stage, natural gas, installation included. 3PI - In Progress

NIGP Code: 031 - 51
Bid # / Bid Item #: AGENCY1TEST13B0000630 / 1 Quote # / Quote Item #: 00000606 / 1

Receipt Method	Qty	Unit Cost	UOM	Discount %	Total Discount Amt.	Tax Rate	Tax Amount	Freight	Total Cost
	1.0	\$12,600.00	EA - Each	0.00	\$0.00		\$0.00	\$0.00	\$12,600.00

Manufacturer: Trane Brand: Trane Model: XV95
Make: Packaging:

Account Code Amount
There is no item accounting available for this item.

Item Notes: Is anyone aware of another good brand?

Print Sequence # 2.0, Item # 2: Furnace filters for item 1. 3PI - In Progress

NIGP Code: 031 - 45
Bid # / Bid Item #: AGENCY1TEST13B0000630 / 2 Quote # / Quote Item #: 00000606 / 2

Receipt Method	Qty	Unit Cost	UOM	Discount %	Total Discount Amt.	Tax Rate	Tax Amount	Freight	Total Cost
	2.0	\$36.00	EA - Each	0.00	\$0.00		\$0.00	\$0.00	\$72.00

Manufacturer: Brand: Model:
Make: Packaging:

Account Code Amount
There is no item accounting available for this item.

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After you save the PO you are ready to submit it. Click on the Summary tab. From here, you submit the PO for approval. After verifying the information is correct click on the **Submit for Approval** button at the bottom of the screen.

Open Market Purchase Order **AGENCY1TEST13P00000344**

Status: 3PI - In Progress

No approval path meets the document criteria. Do you want to manually add approvers or mark the document as approved?

Manually add approvers

Automatic approval

Please select an approver if you want to manually add approvers.

Approver

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For training, select **Automatic approval**, click on **Save & Continue** .

PO - Vendor Notification

Open Market Purchase Order # **AGENCY1TEST13P00000344** Status: 3PRS - Ready to Send

[General](#) | [Items](#) | [Vendor](#) | [Address](#) | [Accounting](#) | [Routing](#) | [Attachments\(2\)](#) | [Notes\(1\)](#) | [Change Orders](#) | [Reminders](#) | **[Summary](#)**

Header Information

Purchase Order Number:	AGENCY1TEST13P00000344	Release Number:	0	Short Description:	Furnace and filters
Status:	3PRS - Ready to Send	Purchaser:	Buyspeed Trainee10	Receipt Method:	Quantity
Fiscal Year:	2013	PO Type:	Open Market	Minor Status:	
Organization:	Department of Technology Management and Budget				
Department:	1TEST - Testing	Location:	321 - office	Type Code:	
Alternate ID:	071P3200462	Entered Date:	07/17/2013 02:30:11 PM	Control Code:	

Approval Path:

Delete	Approver	Order Sequence	Approval Path ID	Level	Approver Type	Date Requested	Date Approved/Disapproved	Approved/Disapproved/Canceled by	Comment View
There are no approval paths found for this Purchase Order.									

Vendor Notification Actions

Option(s): Send Email and Notify Vendor Set to Printed Status

Save & Continue

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Under 'Vendor Notification Actions' select **Send Email and Notify Vendor** then click **Save & Continue**.

Vendor Notification Result

Subject: Purchase Order Notification - Furnace and filters

Email Recipients

Delivery Date: 07/17/2013 03:12:54 PM

Vendor ID	Vendor Name	Email Address
33067.0	Brooklyn Plumbing, Heating, & Air Conditioning Inc	Jane Doe (test@periscopeholdings.com)

OK

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After saving you will see the Vendor Notification Result screen showing the vendor(s) that will receive the email. Click **OK**.

Cloning Bids

The screenshot displays the Buy4Michigan web application interface. At the top, there is a navigation bar with 'Home', 'Items', 'Documents', and 'Vendors' dropdown menus. The 'Documents' dropdown is open, showing a list of document statuses: 'Requests', 'Bids', 'POs', 'Receipts', 'Invoice', 'Quotes', 'New', 'Ready To Open', 'In Progress', 'Ready for Approval', 'Ready to Send', 'Sent', 'Opened', 'Returned', 'Evaluated', 'Approved', 'Bid to PO', and 'Canceled'. A red box highlights the 'Documents' dropdown and the 'Bids' option. Another red box highlights the 'New' option. A red arrow points from the 'New' option to the 'Create a New Bid' dialog box. The dialog box has a title 'Create a New Bid' and a message 'Please select the method to create a new bid:'. There are three radio button options: 'Create a bid from scratch.', 'Clone a bid from another document.', and 'Copy Contracts For Renewal.'. The 'Clone a bid from another document.' option is selected and highlighted with a red box. A 'Continue' button is also highlighted with a red box. The footer of the dialog box reads 'Copyright © 2013 Periscope Holding'.

Another method for creating new Bids is to clone an older Bid. Cloning a document makes a new copy of the document, enabling you to leverage the information that was already entered on the original, but giving you the ability to edit anything where necessary. To search for a Bid to clone, use the **Documents** dropdown in the colored Navigation Bar along the top of the screen. Within the dropdown, hover your mouse over **Bids**, then select **New** to display the **Create a New Bid** screen. Select **Clone a bid from another document** and click **Continue** to proceed with searching for the Bid to clone. Any older Bid can also be cloned by accessing it and clicking the **Clone Bid** button along the bottom of the Summary tab.

Search Documents to Clone to Bid

Search for: Requisitions Bids

Search Using: ALL of the criteria

Find It Clear

Bid # Bid Opening Date(MM/DD/YYYY) Purchaser Trainee10_Buyspeed

Bid Description Organization Department Location

Search Fields: Type Code Catalog Purchase Method NIGP Class NIGP Item Commodity Code Entered Date(MM/DD/YYYY)

Find It Clear

Exit

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Upon selecting **Clone a bid from another document**, you will be shown the **Search Documents to Clone to Bid** screen. First, select **Bids** in the **Search for** field. This will determine the **Search Fields** you will have available to use to find the document to clone. The search feature here functions identically to the **Advanced Search** feature - enter your search criteria and click **Find It** to return matching results below.

Cloning Bids (cont.)

Results

Select	Bid #	Description	Purchase Method	Bid Opening Date	Dept/Loc	Purchaser	Total	Status	Alternate Id
<input type="radio"/>	AGENCY1TEST13B0000528	Furnace and filters	Open Market	06/06/2013 02:30:00 PM	1TEST / 321	Buyspeed Trainee10	\$0.00	Bid to PO	ITRAC #

Open Market Bid AGENCYTEST013B0000617 Status: 2BI - In Progress

General Validation Errors

- The following required fields are missing: bid opening date, available date.

Bid Number: AGENCYTEST013B0000617
 Status: 2BI - In Progress
 How Solicited:
 Department*: TEST01 - Test Department For Install D
 Location*:
 Show on Web:
 Required Date:
 Available Date *(MM/DD/YYYY HH:MM:SS AM or PM):

Search Using:
 Document # Description
 Item Description
 Purchase Method Item Type
 Req Requestor Buyer
 Catalog
 Major Header Status: 2BA - Approved
 2BC - Canceled Minor Header Status
 Major Item Status: 2BA - Approved
 2BC - Canceled

Search Fields:

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Once your search results return, click the button in the **Select** column next to the document you would like to clone. Selecting the **Clone Bid & Exit** button will immediately display the General tab of your new Bid allowing you to begin editing the document. Selecting **Clone Bid & Add More Items** creates your new Bid, but first displays another search screen enabling you to find and add any item to your Bid that has previously appeared on a Buy4Michigan Bid for your Organization. This provides you with the ability to copy previously defined items without having to build them again. You can find and select items using the same process that you used to find the document you just cloned. Once you've added the desired items, you'll be taken to the General tab of your new Bid.