

Introduction

The “How to Create an Open Market Bid from Scratch” Quick Reference Guide is designed to provide the minimum steps necessary in creating a Bid Solicitation and submitting the Bid for approval.

Pre-Requisites

You must have the Basic Purchasing Role.

Steps

<p>NOTE:</p> <ul style="list-style-type: none"> Some required fields are defaulted (i.e. bid type, purchase method, print format). For local municipalities, leave the fields mentioned above, as is. When entering your bid opening date, select the 	

time first, then the date.

Definitions of Fields:

- Available Date - the date the Bid posts
- Bid Opening Date - date bid will be opened & deadline for submission
- Info Contact - who to contact for questions
- Bulletin Des. - more detail info
- Funding Source - how your project is funded. If you do not know, enter N/A

NOTE:
For sealed bids, uncheck the **allow electronic response** box. Typically applies to **local municipalities**.

Form fields include: Bid Type (Open Bid), Control Code, Print Dest Detail (Always), Purchase Method* (Open Market), Tax Rate, Item Single Award Only, Info Contact, Pre-Bid Conference (Max size: 250 characters), Bulletin Desc (Max size: 500 characters), Quote Notification, Funding Source*, Date Last Updated, User last Updated, and a Save & Continue button.

NOTE: Only for State agencies to use. Local municipalities should not use these fields.

Click save & continue once the page has been completed.

There will be a general validation error message that displays after saving your information. Disregard it, the message indicates items need to be added. The message will disappear once you click the items tab (step 8).

Open Market Bid 007115B0004301

General Validation Errors

- No items.

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Basic Purchasing | Department Access | Inquiry | Internal Administrator

Current Organization: Department of Technology, Management & Budget, Procurement

Home | Items | Do

Open Market Bid 007115B0004301

Click the Items Tab.

Click the Add Item button to begin adding your line item(s).

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

Add Item

NOTE: When selecting your commodity code(s) keep in mind that an NIGP class code 900 indicates a service (i.e. construction projects, consulting services, etc.).

Enter in a detailed description of the commodity or service you are seeking.

Required Field - Enter in a quantity or an est. quantity.

Use the drop down menu to enter in a Unit of Measurement. If unknown, leave at EA.

Very important step - select the appropriate comm. code(s) from either the drop down menu or eyeglass icon. For new users, we recommend to use the eyeglasses to do a keyword search (i.e. construction, consulting, maintenance, security, etc).

Click save & add new if you have other comm. codes you need to enter. The system only allows a user to add one line item at a time.
Click save & exit when you are finished adding your code(s).

Quantity	Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt.	Total
0.0	0.00	\$0.00	EA	0.0	0.00	\$0.00

NIGP Class: [dropdown]
NIGP Class Item: [dropdown]

Manufacturer: [text]
Make: [text]
Model: [text]

This product was manufactured within the United States: [checkbox]
Brand Requirement: [dropdown]

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

NIGP KEYWORD SEARCH FROM THE ITEMS TAB

Step #13 from above

NIGP Class: [text] [dropdown] [eyeglasses icon]

NIGP Class Item: [text] [dropdown]

By clicking the eyeglasses, you have the ability to do a keyword search.

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A list of results will display.
NOTE: A 3 digit 900 code indicates a service.

Commodity Code and Service Codes

Search

NIGP Class

NIGP Class Item

NIGP Keyword

Search using

Enter in a keyword (i.e. HVAC, construction, etc.)

Click search after entering a keyword

NIGP Code Browse

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[1](#) [2](#) [3](#) [4](#) [5](#)

Code	Description
<input type="radio"/> 838-96	Wire and Cable Services (Not Otherwise Specified)
<input type="radio"/> 906-84	Telecommunications Services (Architectural, etc.) - Architectural
<input type="radio"/> 915-25	Telecommunications Services (915-85 for Telecommunication Relay Services)
<input checked="" type="radio"/> 915-79	Telecommunication Services (Not Otherwise Classified)
<input type="radio"/> 915-85	Telecommunication Relay Services (Text Telephone (TTY); Text-To-Voice; Voice Carry Over (VCO); Hearing Carry Over (HCO); Speech-To-Speech Relay; Video Relay; Spanish Relay; 7-1-1 Access to TRS)
<input type="radio"/> 918-95	Telecommunications Consulting
<input type="radio"/> 939-72	Radio/Telecommunications/Telephone Equipment (Including 911 Systems and Facsimile Transceivers) Maintenance and Repair
<input type="radio"/> 958-89	Telecommunications Management Services
<input type="radio"/> 967-35	Communications Equipment Manufacturing Services
<input type="radio"/> 985-69	Radio/Telecommunications Equipment and Accessory Rental or Lease (Including Radio Towers)

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[1](#) [2](#) [3](#) [4](#) [5](#)

Click the appropriate code (this example is a service - 915). Only one code can be selected at a time.

Click save & exit when finished

NOTE: Be sure to view both descriptions for the commodity code(s). This includes the NIGP Class & NIGP Class Item.

The system only provides the class item (2 digit) description from the list displayed when doing a keyword search.

For assistance, you may contact the Buy4Michigan coordinator, Isidra Chavez chavez@michigan.gov

The system only provides a partial (class item) description. It's recommended to check the 3 digit (NIGP class) description as well. Put your mouse over the description.

915 - COMMUNICATIONS AND MEDIA RELATED SERVICES

Code	Description
<input type="radio"/> 915-25	Captioned Services for the Hearing Impaired (See 915-85 for T...ces)
<input checked="" type="radio"/> 915-79	Telecommunication Services (Not Otherwise Classified)
<input type="radio"/> 915-85	Telecommunication Relay Services (Text Telephone (TTY); Text-To-Voice; Voice Carry Over (VCO); Hearing Carry Over (HCO); Speech-To-Speech Relay; Video Relay; Spanish Relay; 7-1-1 Access to TRS

Class Item Description (2 digit)

You can disregard these tabs.

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Click the Attachment Tab

Click Add File to upload your attachments

16

Add File

17 Enter in a File Name. The name will be the file name of the attachment.

18 Click Browse to upload your file from your personal computer.

19 Once complete, click save & exit. You can only upload one file at a time.

The screenshot shows the 'Add File' form with fields for Name*, Description, File*, and Location. The 'File*' field contains a file path and a 'Browse...' button. At the bottom, there are buttons for 'Save & Exit', 'Save & Continue', 'Reset', and 'Cancel & Exit'.

20 Click the Bidders Tab to select your vendors who will be notified about the bid opportunity.

21 Click Lookup & Add Vendors Button

Warning message will disappear when bidders are selected.

For internal use only - optional

You do not have to check **unrestricted**, the system is defaulted this way. Typically, **restricted** is not used. However, it can be and it's recommended that local municipalities not use this option.

Leave as is, do not check or uncheck. **Local municipalities** have their own purchasing authority and may do what they want.

The screenshot shows the 'Bidders' tab selected in the navigation menu. It includes a 'Vendor Validation Warnings' section, radio buttons for 'Unrestricted bid' and 'Restricted bid', a table for 'Vendor ID' and 'Vendor Address', and checkboxes for 'Show Unit Prices to Vendors' and 'Hide Bid Holder List on Vendor Side'. A 'Lookup & Add Vendors' button is highlighted at the bottom.

Lookup & Add Reference Vendors - Bid 007115B0004301

Search Using:

Search Fields:

Vendor ID Vendor Name
 Vendor Tax ID Show Vendor Legal Name
 Vendor Keyword Alternate ID
 ZIP Code
 State
 Emergency Suppliers Reference Vendor
 NIGP Class
 NIGP Class Item
 NIGP Keyword

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

Note: It's recommended to select all the vendors in an open market bid.

You also have the ability to manually select specific vendors if you're doing a pre-qualification bid.

For local municipalities, you also have the option to select specific vendors if you do not want to select all vendors listed.

Lookup & Add Reference Vendors - Bid 007115B0004301

Search Using:

Search Fields:

Vendor ID Vendor Name
 Vendor Tax ID Show Vendor Legal Name
 Vendor Keyword Alternate ID
 ZIP Code County
 State
 Emergency Suppliers Reference Vendor
 NIGP Class
 NIGP Class Item
 NIGP Keyword

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

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1 2 3 4 5 6

Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date	Address	Phone	Reference Vendor
<input type="checkbox"/>	21104	123.Net, Inc				24700 Northwestern Hwy. Ste. 700 Southfield MI Serra	(248) 228-8214	No
<input type="checkbox"/>	151					525 N Putnam Williamston MI Mr. Bill Knapp	(517) 281-9518	No
<input type="checkbox"/>	0002					567 Brunswick ST (Billing) 649 S Unionville RD (Shipping) 567 Brunswick ST Sebewaing MI David Wineman	(989) 883-3411	No

23

Check the Select check box in order to select ALL vendors listed from the displayed list.

24

Scroll down to the bottom of the page and click Save & Exit. The vendors will populate on your Bidders Tab.

Indicates how many vendors there are. The system pulls vendors registered under the comm. codes selected from the Items Tab.

Open Market Bid 007115B0004301

General | Items | Address | **Questions** | Amendments | Q & A | Reminders | Summary

Confirmation Messages
• Changes saved successfully

Delete All	Print Sequence	Required	Question	Response Type
<input type="checkbox"/>	1.0	<input checked="" type="checkbox"/>	Are you a disabled vet?	YES/NO
<input type="checkbox"/>	2.0	<input checked="" type="checkbox"/>	As a disabled vet, can you provide proper documentation?	YES/NO
<input type="checkbox"/>	3.0	<input type="checkbox"/>		

Save & Continue | Reset

AVAILABLE
AVERAGE
COMMENT
SCALE10
SCALE15
TEXT
TRUE/FALSE
YES/NO

Open Market Bid 007115B0004301

General | Items | Address | Accounting | Routing | Attachments(3) | Notes | Bidders | Questions | Amendments | Q & A | Reminders | **Summary**

Header Information

Bid Number: 007115B0004301
Description: [Redacted]
Status: In Progress
Purchaser: Isidra Chavez
Minor Status: [Redacted]
How Solicited: [Redacted]
Organization: Department of Technology, Management & Budget, Procurement
Department: [Redacted]
Location: 0071 - DTMB - Procurement
Fiscal Year: 15
Allow Electronic Quotations: [Redacted]
Required Date: [Redacted]
Show On Web: Yes
Available Date: [Redacted]
Bid Opening Date: 05/31/2016 02:30:00 PM
Purge Date: [Redacted]
Bid Type: Open Bid
Informal Bid: No

Submit for Approval | Cancel Bid | Clone Bid | Print

NOTE: Do not check the manually add approvers button.

This view are the vendor email recipients.

You're all set, your bid has now been posted. Vendors will receive an automatic email notification about the bid opportunity.

Also, you'll receive 3 email confirmations (ready to send, approval requested & an email that lists all vendors who were notified).

15690	Carousel Industries	Mr. Alan White (test@periscopeholdings.com)
17119	ADR Consultants, LLC	Mr. Barry Ellertuck (test@periscopeholdings.com)
19009	Cast'd Ashes	Mr. Thomas Reed (test@periscopeholdings.com)

Click OK. Vendors will now be automatically notified about the bid opportunity.

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OK