How to Create a Limited Tendering Form in MacBuy

➢ Click the Limited Tendering Form tile from the shopping home page

➢ The FORM will open > Search for Supplier > Complete Goods and Services Description > add Est Total Value of items (before tax)

➢ Choose a number from the drop-down box coincides with the most appropriate reason

Please choose from the dropbox the number that coincides with the most appropriate reason listed in this table
as per the Canadian Free Trade Agreement (CFTA) and
Canada-European Union Comprehensive Economic and Trade Agreement (CETA)

Limited Tendering Choice	10 ⌄

#	Limited Tendering Reasons

➢ Add as much detail as possible in the Justification section

DEFINITIONS

Single Source: A non-competitive procurement process whereby the purchaser approaches only one supplier for goods or services, even though there may be other capable suppliers.

Sole Source: A non-competitive procurement process used when it is widely accepted by industry standards that there is ONLY one supplier capable of providing the required goods or services.

Justification

Explain in detail why you are requesting a non-competitive procurement. If the Recommended Supplier is the only one that can satisfy the minimum requirements, please elaborate how on the supplier is uniquely qualified and why this uniqueness is pages if necessary).

DETAILED JUSTIFICATION

478 characters remaining

Acknowledgement and Approval

Once you are complete at the top right-hand corner you will select <mark>ADD AND GO TO CART</mark>

***** If you have MORE than 1 line item to add to the Limited Tendering Form you can add additional lines

In available actions (top right corner) use drop down menu you can select

➢ ADD TO CART AND RETURN (this will empty the form and you can add another line with new information)
➢ ADD TO CART (this will ADD your line item and return to the form with all information still available you can override items

Once you are complete and have finished adding the lines, go back to the RIGHT-HAND CORNER of the screen and select ADD AND GO TO CART

This will bring you to complete the requisition.

The shopping cart contains items a user has selected to purchase. Users can add or remove items, change commodity codes, adjust quantities, and view an estimated total purchase amount.

> ➢ Add commodity code
> ➢ Proceed to CHECK OUT

Checkout

Tabs at the top of the page contain additional information about the document. Items are listed in the bottom section.
- Click tabs to view and edit information within them.
- Click the edit 🖉 icon to modify information in a section.
- Click the actions ••• icon to see actions that can be performed for the area you are in. In the Items section, on individual items, you will see actions that can be applied that item only. If you select the icon near the top of the Items section, you will see actions that can be taken for all selected items.
- Click the drop-down menus next to headings see a list of additional actions that can be taken. For example, clicking the drop-down menu next to the Requisition heading displays Continue Shopping or Add Comment actions. Select a line item and open the Actions menu to see a list of actions that can be taken for the selected items.
- The right sidebar shows document totals, primary actions, and related documents. Users can also view approval workflow information in the **What's next for my order?** section.
- Click the FILTER VIEW icon 👁 view or hide header and line-item details, line items only, or accounting codes only.

> ➢ Confirm that you have completed the shipping address, chartfield string and added any internal/external attachments as necessary

Requisition · 3385286 ▼

≡ 👁 🖨 ❓ | Logout | Assign Cart | Place Order

Click to view header or line details

Summary | Taxes/S&H | PO Preview | Comments | Attachments | History

General ✏ ···

Cart Name	2021-11-02 Requester 01
Description	no value
Prepared by	Requester
Prepared for	Requester
Blanket/Service Order	✕
Purchasing BU	MAC01
	MAC01

Shipping ✏ ···

Ship To

ATTN: Kari Wright
BLDG/ROOM: OJN ROOM 302
1 James Street North
MCMASTER-ONE JAMES NORTH DTC RECT
Hamilton, ON L8R 2K3
Canada

Delivery Options

Expedite	✕
Requested Delivery Date	no value

Billing ✏ ··· ⌄

Hamilton, ON L8S 4L8
Canada

Billing Options

Accounting Date	no value

Click any EDIT icon to change information

Draft

⊗ Correct these issues. ⌄
You are unable to proceed until addressed.

Required: Business Unit
Required: Fund
Required: Account

Total (508.50 CAD) ›

What's next for my order? ⌄

Next Step	Wait for Initial Response
Approvers	There are no approvers

Workflow ⤢ 🖨

○ **Draft**
Active
Requester

◇ Start - Parallel Steps

○ **Initial Validation Request** ···
Future

○ **Wait for Initial Response** ···
Future

◇ End - Parallel Steps

Accounting Codes ✏ ··· ⌄

Business Unit	Fund	Account	Department	Program	PCBU	Project	Project Activity	Analysis Type	Resource Type
no value	no value	no value	no value	no value	no value	no value	no value	no value	no value
⊗ Required	⊗ Required	⊗ Required							

Internal Notes and Attachments ✏ ···

Internal Note	no value
Internal Attachments	Add

External Notes and Attachments ✏ ··· ⌄

Note to all Suppliers	no value
Attachments for all suppliers	Add
PO Clauses	1 Edit | View details

Once complete HIT PLACE ORDER

≡ 👁 🖨 ❓ | Assign Cart | **Place Order**

PO Clauses	1 Edit | View details

··· ☐ ▾

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✏

no value

Draft

Total (79,100.00 CAD) ⌄

Subtotal	70,000.00
GST/HST	9,100.00
Shipping	0.00
Handling	0.00
	79,100.00