



U.S. General Services Administration

Federal Acquisition Service

Directed Buy

GSA Training Module Developed for IWAC RBA Extension Project

Directed Buy Training Module Overview

Description: This training module will take you step-by-step through the Directed Buy document in the Regional Business Application (RBA) IT-Solutions Shop (ITSS) component.

Navigation: If the tutorial opens up in your web browser, simply click your mouse or your space bar to advance to the next slide. Use the “Backspace” key to go back. If the tutorial opens in the PowerPoint application, click on “F5” to view the tutorial. Use the spacebar or click your mouse to advance to the next slide. To go back, click on the “Backspace” key.

Directed Buy Glossary

Term	Definition
Directed Buy	Creating a Directed Buy on the basic mod (00) bypasses the RFQ process - a single contractor is selected on the BOMSOW to be issued the order directly.
Dollars Subform	The Dollars subform has fields for capturing costs, fees, totals, and other money-related values. The Dollars subform needs to be populated and submitted prior to certification of funds.
Flat Fee	A type of GSA Fee where the client is charged a flat rate. Flat fees are billed to the client upon acceptance of the first invoice against the task item.
Surcharge	A type of GSA Fee where the client is charged a calculated percentage of the task item cost.
Surcharge Amount	The calculated product of the cost of the task item times the task item surcharge rate.
Surcharge Rate	A percentage used to calculate the GSA Fee if the type of fee for the task item is Surcharge.

Directed Buy Privileges

User Role Action	Create	Edit	View
GSA user	✓*	✓	✓
Client			✓
Contractor			✓**

*Cannot create Directed Buy if 'Publish in e-Buy' field on BOMSOW set to 'Yes'

**Can only view Directed Buy if they are the first selected contractor on the BOMSOW

Select a View:
[<<-- View Orders -->](#) [<<-- View Inactive Orders -->](#) [<<-- View Action Items -->](#) [<<-- View Support Information -->](#)

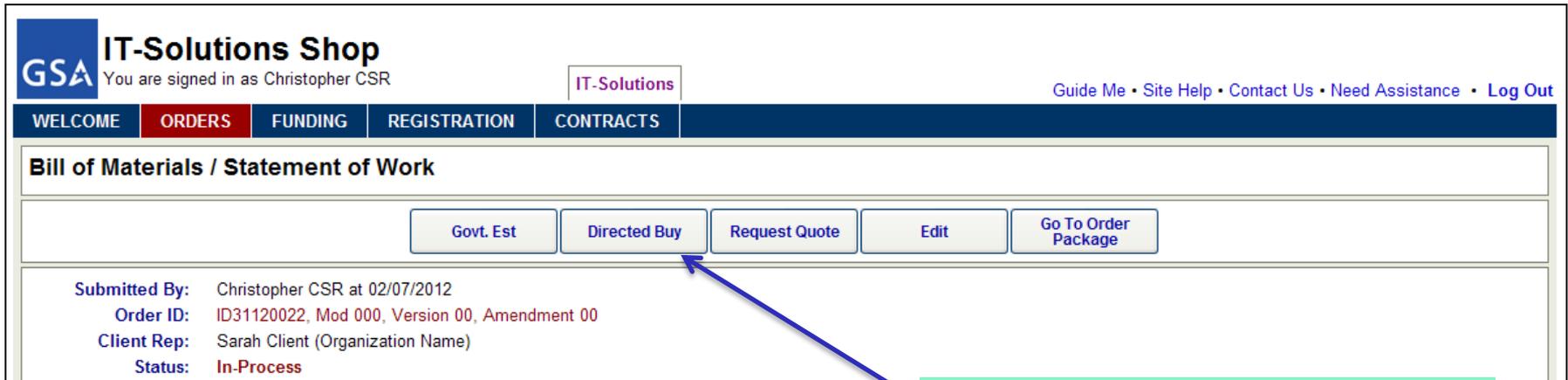
Go to a Specific View Item: [Create New Order](#)

Orders - Entire Package

- Next -> |
- ▼ Order Package
 - ▼ ID31120022-COI Sarah Client (Organization Name) Directed Buy>>Furniture procurement
 - 00 Chronology
 - ▶ 01 Electronic Contract File (ECF)
 - ▼ 01 BOM/SOW ID31120022 - 000 Amendment 00 DIRECTED BUY
 - ▼ Directed Buy - Revision 00 
 - >Certification of Funds has been sent to FM at ITOMS

Click on the Directed Buy link in the Order Package View to open an existing Directed Buy in view mode.

Creating a Directed Buy



The screenshot displays the GSA IT-Solutions Shop interface. At the top left, the GSA logo is followed by the text "IT-Solutions Shop" and "You are signed in as Christopher CSR". A navigation menu includes "WELCOME", "ORDERS", "FUNDING", "REGISTRATION", and "CONTRACTS". A "IT-Solutions" dropdown menu is open, and a "Guide Me" link is visible. Below the navigation, the page title is "Bill of Materials / Statement of Work". A row of buttons includes "Govt. Est", "Directed Buy", "Request Quote", "Edit", and "Go To Order Package". A blue arrow points to the "Directed Buy" button. Below the buttons, the following information is displayed:

Submitted By: Christopher CSR at 02/07/2012
Order ID: ID31120022, Mod 000, Version 00, Amendment 00
Client Rep: Sarah Client (Organization Name)
Status: In-Process

To create a Directed Buy, GSA users click the Directed Buy button on BOMSOW. If the **Publish in e-Buy** field on the BOMSOW is set to Yes, the Directed Buy button will not be available.

GSA IT-Solutions Shop
You are signed in as Christopher CSR

IT-Solutions

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WELCOME **ORDERS** FUNDING REGISTRATION **CONTRACTS**

Directed Buy

Close Without Saving

The Contractor selected on the BOMSOW is automatically pre-populated as the Contractor

All Fields marked with  are required

Submitted By: Christopher CSR at 02/07/2012

Contractor: Steve Contractor (IT INDUSTRY PARTNERS)

Contract Number:  under << Open Market >> 

PIID Code:  A - Agreements (including basic agreements, BOAs and BPAs)

Fiscal Year of Award:  2012 

PIID:  [To Be Generated]

Contract Type:  Fixed Price

Order ID: ID31120022, Mod 000, Revision 00

Status: **In-Process**

Directed Buy Details:

The system will automatically generate a standardized Procurement Instrument Identification Number (PIID) upon submission of the Directed Buy

 **AND/OR** - To complete the Directed Buy, you must enter in either Directed Buy Details (above) or attach one or more document(s)(below). You may use both, one is required.

File Attachments:



GSA user must enter details about the Directed Buy in the text area or attach a file

File attachments have a maximum size limit of 50 MB per file.
File attachments must have a unique filename within the entire order.



IT-Solutions Shop

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WELCOME
ORDERS
FUNDING
REGISTRATION
CONTRACTS

IT-Solutions

Directed Buy

Close Without Saving

☞ All Fields marked with ● are required.

Submitted By: Christopher CSR at 02/07/2012

Contractor: Steve Contractor (IT INDUSTRY PARTNERS)

Contract Number: ● under << Open Market >> ←

PIID Code: ● A - Agreements (including basic agreements, BOAs and BPAs)

Fiscal Year of Award: ● 2012

PIID: ● [To Be Generated]

Contract Type: ● Fixed Price

Order ID: ID31120022, Mod 000, Revision 00

Status: In-Process

Directed Buy Details:

● **AND/OR** - To complete the Directed Buy, you must enter in either Dir (above) or attach one or more document(s)(below). You may use both required.

PIID is covered in detail within the *Standardized Numbering Conventions* training module.

If the winning quote/offer references a contract number that is 'Pending Approval' you will not be able to proceed until that contract number is approved and available for selection.

If the winning quote/offer references an existing contract number (for example, a Schedule or GWAC); you will be given the opportunity to select a from a list of PIID Codes, two of which will result in a 13-character PIID (these are "NA – Delivery/Task Order" and "NA – BPA Call". There is a third option "A – Blanket Purchase Agreement under a Schedule contract" but this will generate a 14-character PIID.

If the winning quote/offer does not reference an existing contract number and instead is listed as 'Open Market'; you will be given the opportunity to select from a different list of PIID Codes, all of which will result in a 14-character PIID number.

If indicated that Fair Opportunity was properly conducted, then a Number of Bids received field will be displayed and required.

If indicated that Fair Opportunity was **not** conducted then Exception and Justification fields will be displayed and required.

General Comments:

Fair Opportunity Properly Conducted: Yes No

Fair Opportunity Exception:

Exception Justification:



Current Project Value: \$200,000.00 (POP From Date 02/15/2012 To 02/29/2012, Delivery Date 02/21/2012)

Incremental Funding
 Will this order use Incremental Funds? Yes No
 Grand Total for Incremental Funding: \$175,000.00
 Total Contractor Proposed Amount: \$200,000.00

Fee Calculations
 The following fields are used for entire Project order amounts. Task Items marked "Active" will require Funding.

 Apply a single surcharge rate across all task items? Yes No

Active	Fiscal Task Type	Item No.	Description	Contractor Proposed Amount	Prior Cost to GSA Increase or Decrease	New Task Item Amount	Type of Charge	Fee Amount	Cost to GSA	Cost to Client	Remove
<input checked="" type="checkbox"/>	COM	0001	Furniture	\$100,000.00	\$0.00 \$80,000.00	\$80,000.00	Surcharge	12% \$9,600.00	\$80,000.00	\$89,600.00	
<input checked="" type="checkbox"/>	COM	0002	Seating	\$50,000.00	\$0.00 \$50,000.00	\$50,000.00	Surcharge	12% \$6,000.00	\$50,000.00	\$56,000.00	
<input checked="" type="checkbox"/>	FFP	0003	Installation	\$50,000.00	\$0.00 \$45,000.00	\$45,000.00	Flat Fee	\$2,500.00	\$45,000.00	\$47,500.00	

Click the button to calculate the total amounts

ORDER TOTALS

Prior Order Cost to GSA:	\$0.00	Prior Order Cost to Client:	\$0.00
Increase/Decrease Order Cost to GSA:	\$175,000.00	Increase/Decrease Order Cost to Client:	\$193,100.00
Total Order Cost to GSA:	\$175,000.00	Total Order Cost to Client:	\$193,100.00

Edit History

This is a U.S. General Services Administration Federal government computer system that is "For Official Use Only".
[Privacy Statement](#)

Dollars Subform

Click *Submit* to save the Directed Buy and proceed with creation of the Certification of Funds document

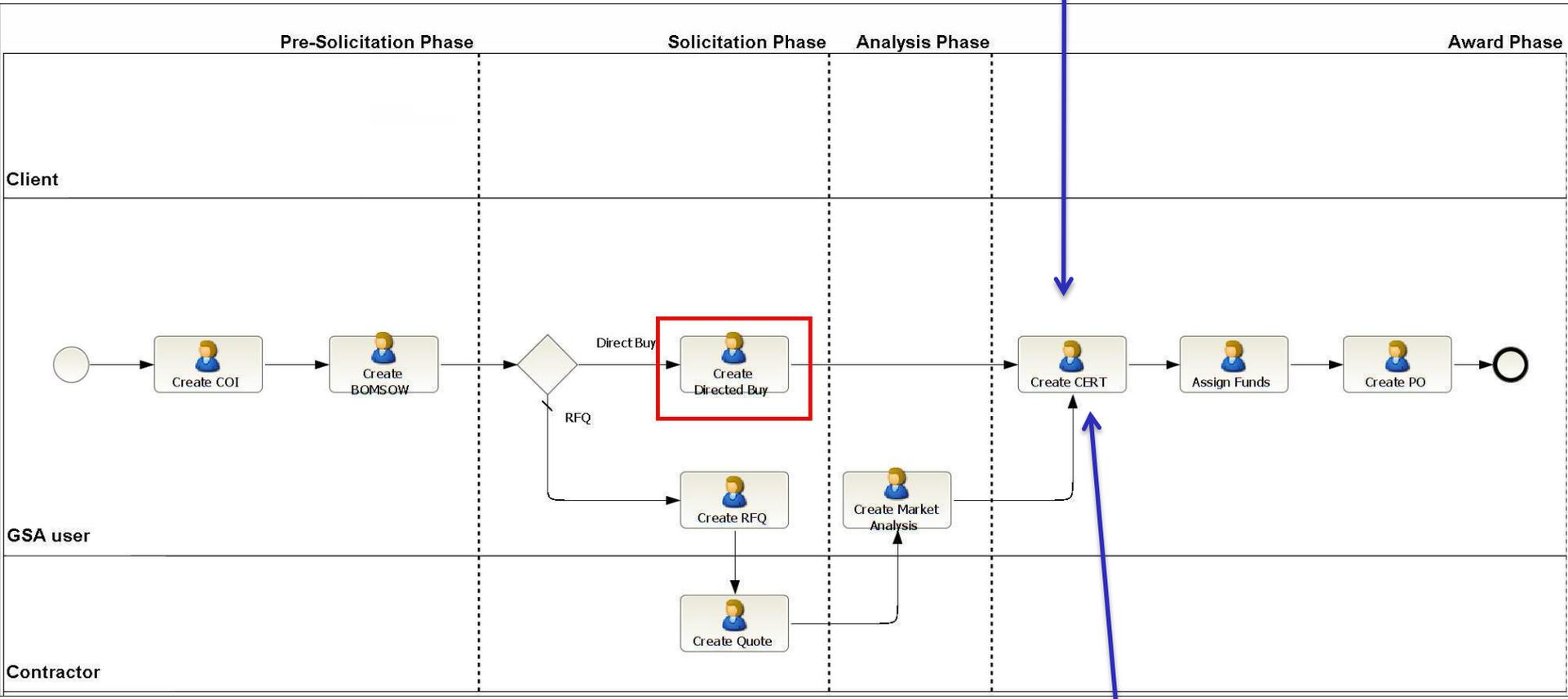
The Dollars Subform is covered in detail within the *Dollars Subform* training module

Directed Buy Status Glossary

Status	Definition
In-Process	Initial starting status of Directed Buy.
Ready	Directed Buy has been submitted, GSA approval is not required and is ready for Certification of Funds.
GSA Recommended	Directed Buy has been submitted, GSA approval required.
Approving Official Accepted	Approving Official has accepted Directed Buy and is ready for Certification of Funds.
Recommendation Rejected	Approving Official has rejected Directed Buy. Order cannot proceed to Certification of Funds. GSA user must create either a new Directed Buy or new RFQ.
Rejected	GSA user rejected Directed Buy. Order cannot proceed to the Certification of Funds. GSA user must create either a new Directed Buy or new RFQ.

Next Steps...

After a Directed Buy is submitted the user is able to create a Certification of Funds (CERT) document



All task item details (item no., description, pop/delivery date, and active flag) are locked-down as non-editable when a CERT is created. Only active task items go on to the CERT for funding.

Federal Acquisition Service

Questions & Support

- For questions regarding AAS Policy please contact randy.matlack@gsa.gov or robert.niewood@gsa.gov
- For questions regarding the RBA Directed Buy training module please contact RBA Technical Support:
 - Phone: (877) 472-4877
 - Email: AASBS.helpdesk@gsa.gov

