



Create/Modify Bid- REQ3500

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This page is used to create new bids and edit existing bids. Bids are submitted to vendors to solicit a quote on specific products.

- Requisitions with a credit card code cannot be added to a bid.
- You can only view the bids that you created; however, if the **Global Access** field is selected on the Maintenance > User Profiles > Purchasing Permissions tab in District Administration, you can view bids created by all users.
- Only the final approver in a selected workflow can create or modify a bid.

Create a bid:


Retrieve an existing record.	Search for a record.	
	<table border="1"> <tr> <td>Bid Nbr</td> <td>Type the six-digit bid number to be retrieved, if known. Leading zeros are not required.</td> </tr> </table> <p>Click Retrieve. If the bid number is not known, click Directory. To search for a specific bid number, type data in one or more of the search fields. To search through all available data, leave all fields blank. Click Search. A list of bid numbers matching the search criteria is displayed.</p>	Bid Nbr
Bid Nbr	Type the six-digit bid number to be retrieved, if known. Leading zeros are not required.	

Select a bid number from the list. Otherwise, click **Cancel**.


Click **Add Bid** to create a bid.

Under **Bid Information**:

Field	Description
Bid Nbr	AUTO is displayed indicating that the Auto Assign Bid Number field is selected on the Options > Purchasing Options > Current Year tab in District Administration. The bid number is automatically populated with the next available bid number when the bid is saved.
Buyer	The logged-on user's name is displayed.
Payment Terms	Type the allowed payoff period (e.g., Net 30).
Request Date	Type the date that you are requesting the bid in the MMDDYYYY format. Or, select a date from the calendar.
Date Open	Type the beginning date for the bid in the MMDDYYYY format. Or, select a date from the calendar. In the blank field, type the begin time in the HH MM format.
Date Close	Type the ending date for the bid in the MMDDYYYY format. Or, select a date from the calendar. In the blank field, type the begin time in the HH MM format.
Ship To	Press the SPACEBAR to view and select a shipping address from the drop-down list. The shipping addresses are populated from the Tables > Receiving Addresses page in District Administration.

Field	Description
Distribute Ship To	Click to replace the Ship To field for each individual bid item with the selected Distribute Ship To address.
Reference	Type the bid description.
Requisition Directory	<p>Click to select a requisition to be added to the bid. The Requisition Directory is displayed. Only requisitions pending final approval from the logged-on user are displayed.</p> <p>To search for a specific item, type data in one or more of the search fields. To search through all available data, leave all fields blank.</p> <p>Click Search. A list of data that matches the search criteria is displayed.</p> <p>Click  to view the line items for the selected requisition.</p> <p>Click Copy Line Items to copy the line items from the requisition to the bid.</p> <p>Click Cancel or X to close the Requisition Directory.</p>

Under **Bid Items**, the [requisition](#) line item details are displayed.

Note	Click to view or add bid notes. If notes exist, a paperclip icon is displayed on the Note button.
	<p>Click to delete a requisition from the bid. The requisition line item(s) is highlighted red to indicate that it will be deleted upon saving the record.</p> <p>A trashcan icon is displayed for each requisition. You cannot delete a single line item, unless it is the only line item in the requisition.</p>

Click **Save**.

Submit	<p><input type="checkbox"/> Click Submit to submit the requisition. A message with the requisition number is displayed indicating that the requisition process is completed. You are prompted to print the Purchasing Requisition Report.</p> <ul style="list-style-type: none"> • Click Yes to continue and print the report. • Click No to continue without printing the report. <p>The requisition is forwarded to the next approver in the approval path.</p>
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Other functions and features:

+Add	<p>Add a row.</p> <p>Click to add a new row.</p>
Retrieve	<p>Retrieve data.</p> <p>The Retrieve button is also used to retrieve information from the last save. If you click Retrieve, any unsaved changes are lost.</p>

<p>Vendor Notes</p>	<p>Add or view a vendor note. Click to add or view vendor notes. A Vendor Notes window is displayed. If there is a paper clip next to the Vendor Notes button, a requisition vendor note exists. In the Vendor Notes window, type the note to be printed on the purchase order for the vendor to view. Notes: If you are using a preprinted purchase order form, the text displayed on the purchase order is limited to one line that is approximately three inches in length. If you are not using a preprinted purchase order form, the text displayed on the purchase order is limited to three lines that are approximately three inches in length. Use the scale above the text to measure the length of the note. Click OK to save the vendor note and close the window. Click Cancel to close the window without saving the note.</p>
<p>Comments</p>	<p>Add comments to the requisition. Click to add or view requisitions comments. These comments are displayed on the District copy of the purchase order. A Requisition Comments window is displayed. If there is a paper clip icon next to the Comments button, a requisition comment exists. In the Requisition Comments window, type comments about the requisition. Click OK to save the requisition comment and close the window. Click Cancel to close the window without saving the comment.</p>

Uniform Acct Distr

Distribute amounts.

Click **Uniform Acct Distr** to assign one or more account codes to the entire requisition. You can split all of the costs for a requisition item between two or more funds. The percentage split does not have to be the same for each fund, but the sum of all percentages must equal 100%.

The Uniform Account Distribution pop-up window is displayed.

Complete the following fields:

Account Code	<p>Type the account code to be charged. The account code must exist in the general ledger and in the user profile (the account code must be assigned to the Requestor's user profile in District Administration.).</p> <p>The account code is comprised of the fund, function, object, subobject, organization, and program codes, and are the individual components that uniquely identify a specific budget category. You can add multiple accounts for each item.</p> <p>Press the SPACEBAR to view a list of account codes associated with the requestor's user profile. If the account code is not known, click Account Codes. The Accounts Codes lookup is displayed.</p> <ul style="list-style-type: none"> Type data in the individual account code component fields and click Search. A list of account codes matching your search components is displayed. Select the applicable account code from the list. Otherwise, click Cancel to close the Account Codes lookup. The Description field is populated with the description of the account. <p>Note: If an account code is added or changed, click Approve to save the account code and continue with the approval process.</p>
Description	<p>This field is populated with the account description from the Finance chart of accounts.</p>
Balance	<p>Displays the fund balance available in the account. A negative balance indicates that the fund has available funds.</p>
Pct	<p>Type the percent of that item to charge the selected fund. Each requisition must equal 100%.</p> <p>For example, the percent would be 100% if you paid from one account; however, if you paid from two accounts, you could split the amount 50/50, 75/25, or 60/40 for a total of 100%.</p>
Amount	<p>Type the amount to charge the selected fund. The amount that will be charged to that account according to the percent entered in the Percent Field.</p>








Click **Refresh Totals** to update the totals if any amounts are changed in the grid.

Click **Calculate Percent** to populate the **Percent** column based on the amount entered in the **Amount** column.

Click **Calculate Amount** to populate the **Amount** column based on the amount entered in the **Percent** column.

• Click **OK** to apply the amounts.

• Click **Cancel** to close the window without applying the amounts.

<p>Print</p>	<p>Print requisition details.</p> <p>Review the report using the following buttons:</p> <p>Click  to go to the first page of the report. Click  to go back one page. Click  to go forward one page. Click  to go to the last page of the report.</p> <p>The report can be viewed and saved in various file formats.</p> <p>Click  to save and print the report in PDF format. Click  to save and print the report in CSV format. (This option is not available for all reports.) When a report is exported to the CSV format, the report headers may not be included. Click X to close the report window. Some reports may have a Close Report, Exit, or Cancel button instead.</p>
<p>Delete</p>	<p>Delete the requisition.</p> <p><input type="checkbox"/> Click Delete to delete the requisition. A message is displayed asking you to confirm the deletion.</p> <ul style="list-style-type: none"> • <p>Click Yes to delete the requisition.</p> <ul style="list-style-type: none"> • <p>Otherwise, click No to not delete the requisition.</p> <p>Notes:</p> <ul style="list-style-type: none"> • <p>A requisition cannot be deleted while it is being edited.</p> <ul style="list-style-type: none"> • <p>If you delete a requisition, click Save before editing or creating a new requisition.</p> <ul style="list-style-type: none"> • <p>Only the originator can delete the requisition.</p>
<p></p>	<p>Delete a row.</p> <p>Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.</p> <p>Click Save.</p>
<p>Documents</p>	<p>View or attach supporting documentation.</p>