



## **Create/Modify Bid- REQ3500**



# Table of Contents

**Create/Modify Bid- REQ3500** ..... i  
**Create/Modify Bid- REQ3500** ..... 1



# Create/Modify Bid- REQ3500

**Purchasing > Maintenance > Bid Processing > Create/Modify Bid**

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:


<b>Retrieve an existing record.</b>	<a href="#">Search for a record.</a>	
	<table border="1"> <tr> <td><b>Bid Nbr</b></td> <td>Type the six-digit bid number to be retrieved, if known. Leading zeros are not required.</td> </tr> </table> <p>Click <b>Retrieve</b>.                  If the bid number is not known, click <b>Directory</b>.                  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 <b>Search</b>. A list of bid numbers matching the search criteria is displayed.</p>	<b>Bid Nbr</b>
<b>Bid Nbr</b>	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
<b>Bid Nbr</b>	AUTO is displayed indicating that the <b>Auto Assign Bid Number</b> 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.
<b>Buyer</b>	The logged-on user's name is displayed.
<b>Payment Terms</b>	Type the allowed payoff period (e.g., Net 30).
<b>Request Date</b>	Type the date that you are requesting the bid in the MMDDYYYY format. Or, select a date from the calendar.
<b>Date Open</b>	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.
<b>Date Close</b>	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.
<b>Ship To</b>	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
<b>Distribute Ship To</b>	Click to replace the <b>Ship To</b> field for each individual bid item with the selected <b>Distribute Ship To</b> address.
<b>Reference</b>	Type the bid description.
<b>Requisition Directory</b>	<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 <b>Search</b>. 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 <b>Copy Line Items</b> to copy the line items from the requisition to the bid.</p> <p>Click <b>Cancel</b> or X to close the Requisition Directory.</p>

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

<b>Note</b>	Click to view or add bid notes. If notes exist, a paperclip icon is displayed on the <b>Note</b> 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>
<b>Save</b>	<input type="checkbox"/> Click <b>Save</b> . The bid status is changed to <i>N - Saved</i> , and the status for all pending requisitions in the bid is changed to <i>Q - Bid for Quote</i> . Requisitions can be viewed on the Purchasing > Inquiry > Requisition Status Inquiry page, but cannot be retrieved or approved on the Purchasing > Maintenance > Approve Requisition page.
<b>Submit</b>	<input type="checkbox"/> Click <b>Submit</b> . The bid is transferred to the Request Vendor Quote page.

**Other functions and features:**

<b>Retrieve</b>	<p><a href="#">Retrieve data.</a></p> <p>The <b>Retrieve</b> button is also used to retrieve information from the last save. If you click <b>Retrieve</b>, any unsaved changes are lost.</p>
<b>Comments</b>	<p><a href="#">Add comments to the bid.</a></p> <p>Click to view or add comments to the bid. The comments are strictly for bid purposes and are not displayed on the purchase order. If comments exist, a paperclip icon is displayed on the <b>Comment</b> button.</p> <p>Click <b>OK</b> to save the comment and close the window.</p> <p>Click <b>Cancel</b> to close the window without saving the comment.</p>

<p><b>Print</b></p>	<p><a href="#">Print the bid details.</a></p> <p><b>Review the report using the following buttons:</b></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><b>The report can be viewed and saved in various file formats.</b></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 <b>X</b> to close the report window. Some reports may have a <b>Close Report, Exit,</b> or <b>Cancel</b> button instead.</p>
<p><b>Delete</b></p>	<p><a href="#">Delete the bid.</a></p> <p>Click to delete a bid. All associated requisitions are updated with a <i>P - Pending status</i>. Requisitions can be viewed on the Purchasing &gt; Inquiry &gt; Requisition Status Inquiry page, and approved on the Purchasing &gt; Maintenance &gt; Approve Requisition page.</p>
<p></p>	<p><a href="#">Delete a row.</a></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 <b>Save</b>.</p>