

Request Vendor Quote - REQ3510

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This page is used to submit a bid to a vendor to solicit a quote. You can only view the bid 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 the bids created by all users.

Request a vendor quote:

Retrieve an existing record.	Search for a record. **Bid Nbr** — Type the six-digit bid number to be retrieved, if known. Leading zeros are not required. 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. 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 MMDDYYY 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.
Reference	Type the bid description.

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.

In the lower grid:

Assign Vendor Directory	Click to select the vendors to be solicited. The Assign Vendor Directory is displayed. Only vendors with the **Bid Eligible** field selected on the Finance > Maintenance > Vendor Information > Vendor Name/Address tab are displayed. 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. Click **Search**. A list of data that matches the search criteria is displayed. Select the vendor(s) that you want to solicit and click **OK**. The selected vendors are displayed under **Vendor Information**. Click **Cancel** to close the directory.
	Click to delete a vendor name from the bid. The vendor name is highlighted red to indicate that it will be deleted upon saving the record.

Save	❑ Click **Save** to save the vendor quote request. The bid status is changed to *Q - Saved*.
Submit	❑ Click **Submit**. The bid is transferred to the Request Vendor Quote page.

Other functions and features:

Retrieve	Retrieve data. The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Comments	Add comments to the bid. 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 **Comment** button. Click **OK** to save the comment and close the window. Click **Cancel** to close the window without saving the comment.
Print	Print the bid details. **Review the report using the following buttons**: 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. **The report can be viewed and saved in various file formats**. 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.
Delete	Delete the bid. Click to delete a bid. All associated requisitions are updated with a *P - Pending status*. Requisitions can be viewed on the Purchasing > Inquiry > Requisition Status Inquiry page, and approved on the Purchasing > Maintenance > Approve Requisition page.
	Delete a row. Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.