



## Create/Modify Bid- BWH3500



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# Create/Modify Bid- BWH3500

**Warehouse > 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 inventory products.

All users with **Global Access** selected on the Maintenance > User Profiles > Permissions tab in District Administration can create bids and view existing bids.

## Create a bid:

<b>Retrieve an existing record.</b>	<p><a href="#">Search for a record.</a></p> <p><b>Bid Nbr</b> Type the six-digit bid number to be retrieved, if known. Leading zeros are not required.</p> <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. Select a bid number from the list. Otherwise, click <b>Cancel</b>.</p>
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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.
<b>Distribute Ship To</b>	Click to replace the <b>Ship To</b> field for each individual bid item with the selected <b>Ship To</b> address.

Field	Description
<b>Distribute Freight Term</b>	Click to replace the <b>Freight Term</b> field for each individual bid item with the selected <b>Freight Term</b> address. The freight terms are maintained on the Tables > Freight Terms page in District Administration.
<b>Reference</b>	Type the bid description.
<b>Inventory Directory</b>	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. 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 <b>Search</b> . A list of data that matches the search criteria is displayed. Click  to view the line items for the selected requisition. Click <b>Copy Line Items</b> to copy the line items from the requisition to the bid. Click <b>Cancel</b> or X to close the Requisition Directory.

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.
 <b>Save</b>	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. 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.
<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>	<a href="#">Retrieve data</a> . 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.
<b>Comment</b>	<a href="#">Add comments to the bid</a> . 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. Click <b>OK</b> to save the comment and close the window. Click <b>Cancel</b> to close the window without saving the comment.

<b>Print</b>	<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.</p> <p>Click  to go back one page.</p> <p>Click  to go forward one page.</p> <p>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.</p> <p>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.</p> <p>Click  to close the report window. Some reports may have a <b>Close Report</b>, <b>Exit</b>, or <b>Cancel</b> button instead.</p>
<b>Delete</b>	<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><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>