



## **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> | <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>.<br/>                 If the bid number is not known, click <b>Directory</b>.<br/>                 To search for a specific bid number, type data in one or more of the search fields.<br/>                 To search through all available data, leave all fields blank.<br/>                 Click <b>Search</b>. A list of bid numbers matching the search criteria is displayed.<br/>                 Select a bid number from the list. Otherwise, click <b>Cancel</b>.</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.   |                |


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>Freight Term</b>            | Press the SPACEBAR to view and select a freight term from the drop-down list. The freight terms are populated from the Tables > Freight Terms page in District Administration.  |
| <b>Distribute Freight Term</b> | Click to replace the <b>Freight Term</b> field for each individual bid item with the selected freight term.   |
| <b>Reference</b>               | Type the bid description.   |
| <b>Inventory Directory</b>     | Click to select inventory items to be added to the bid. The Inventory Directory is displayed.<br>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.<br>Click <b>Search</b> . A list of data that matches the search criteria is displayed. Select the inventory items to be included in the bid.<br>Click <b>OK</b> to close the Inventory Directory and add the inventory items to the bid.<br>Click <b>Cancel</b> or  to close the Inventory Directory. |

Under **Bid Items**, the inventory bid 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.   |
|  | 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.<br>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><br>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><br>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.<br>Click <b>OK</b> to save the comment and close the window.<br>Click <b>Cancel</b> to close the window without saving the comment. |

|  |   |
|--|---|
| <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.<br/>         Click  to go back one page.<br/>         Click  to go forward one page.<br/>         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.<br/>         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.<br/>         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>  |