



Create/Modify Bid- REQ3500

Table of Contents

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:

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. Select a bid number from the list. Otherwise, click Cancel.</p>	Bid Nbr
Bid Nbr	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
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.
Distribute Ship To	Click to replace the Ship To field for each individual bid item with the selected Distribute Ship To address.








Field	Description
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>
Save	<input type="checkbox"/> Click Save . 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.
Submit	<input type="checkbox"/> Click Submit . The bid is transferred to the Request Vendor Quote page.

Other functions and features:

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>
Comments	<p>Add comments to the bid.</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 Comment button.</p> <p>Click OK to save the comment and close the window.</p> <p>Click Cancel to close the window without saving the comment.</p>

<p>Print</p>	<p>Print the bid 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 bid.</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 > Inquiry > Requisition Status Inquiry page, and approved on the Purchasing > Maintenance > Approve Requisition page.</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>



Back Cover