



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



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# 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>	<b>Bid Nbr</b> Type the six-digit bid number to be retrieved, if known. Leading zeros are not required.
	<p>Click <b>Retrieve</b>.</p> <p>If the bid number is not known, click <b>Directory</b>.</p> <p>To search for a specific bid number, type data in one or more of the search fields.</p> <p>To search through all available data, leave all fields blank.</p> <p>Click <b>Search</b>. A list of bid numbers matching the search criteria is displayed.</p>

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.
<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.

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>Distr 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>Requisition 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.
	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>	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>	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>	Click to print the bid details. <a href="#">Review the report</a> .
<b>Delete</b>	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.
	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.  Click <b>Save</b> .



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