


# Create/Modify Bid- REQ3500

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***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.** | **Bid Nbr** Type the six-digit bid number to be retrieved, if known. Leading zeros are not required.<br>Click **Retrieve**.<br>If the bid number is not known, click **Directory**.<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 **Search**. A list of bid numbers matching the search criteria is displayed.<br>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. |
| **Distribute Ship To** | Click to replace the **Ship To** field for each individual bid item with the selected **Distribute Ship To** address. |

| Field | Description |
|---|---|
| **Freight Term** | 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. |
| **Distr Freight Term** | Click to replace the **Freight Term** field for each individual bid item with the selected freight term. |
| **Reference** | Type the bid description. |
| **Requisition Directory** | 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.<br>To search for a specific item, type data in one or more of the search fields.<br>To search through all available data, leave all fields blank.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br>Click to view the line items for the selected requisition.<br>Click **Copy Line Items** to copy the line items from the requisition to the bid.<br>Click **Cancel** or X to close the Requisition Directory. |

❑ 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. |
| | 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. |

❑ Click **Save**. The bid status is changed to *N - Saved*, and the status for all pending requisitions in the bid is changed to *Q - Bid for Quote*. 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.

❑ Click **Submit**. The bid is transferred to the Request Vendor Quote page.

## Other functions and features:

| | |
|---|---|
| **Retrieve** | The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost. |
| **Comment** | 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.<br>Click **OK** to save the comment and close the window.<br>Click **Cancel** to close the window without saving the comment. |
| **Print** | Click to print the bid details. Review the report. |
| **Delete** | 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. |
| | Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.<br><br>Click **Save**. |


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