

Request Vendor Quote - REQ3510

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Purchasing > Maintenance > Bid Processing > Request Vendor Quote

This page is used to submit a bid to a vendor to solicit a quote. You can only view the bid 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 the bids created by all users.

Request a vendor quote:

Retrieve an existing record.	**Bid Nbr** Type the six-digit bid number to be retrieved, if known. Leading zeros are not required. 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**.

❑ Under **Bid Information**:

Field	Description
Bid Nbr	The assigned bid number is displayed.
Buyer	The buyer'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	The ship-to address is displayed.
Freight Term	The freight term is displayed.
Reference	The bid reference description is displayed.

❑ Under **Bid Items**, the requisition line item details are displayed.

Note	Click to view bid notes. The notes pop-up window is displayed with any existing notes. Click **OK** to close the pop-up.

❑ Under **Vendor Information**:

Assign Vendor Directory	Click to select the vendors to be solicited. The Assign Vendor Directory is displayed. Only vendors with the **Bid Eligible** field selected on the Finance > Maintenance > Vendor Information > Vendor Name/Address tab 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 **Search**. A list of data that matches the search criteria is displayed. Select the vendor(s) that you want to solicit and click **OK**. The selected vendors are displayed under **Vendor Information**. Click **Cancel** to close the directory.
	Click to delete a vendor name from the bid. The vendor name is highlighted red to indicate that it will be deleted upon saving the record.

❑ Click **Save** to save the vendor quote request. The bid status is changed to *Q - Saved*.

❑ Click **Submit** to submit all of the bid line items to each selected vendor. The bid is transferred to the Vendor Response page.

Note: You must print or email the Reports > Bid Processing Reports > Request for Quotation Report (REQ2000) before you can retrieve a bid or enter a vendor response on the Vendor Response 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. Click **OK** to save the comment and close the window. Click **Cancel** to close the window without saving the comment.
Print	Click to print the bid details. Review the report.
Return	Click to return the bid to the Create/Modify Bid page.
	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.


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