Create/Modify Bid- BWH3500

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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:

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**.	

❑ 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 **Ship To** address.
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.

Field	Description
Distribute Freight Term	Click to replace the **Freight Term** field for each individual bid item with the selected freight term.
Reference	Type the bid description.
Inventory Directory	Click to select inventory items to be added to the bid. The Inventory Directory is 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 inventory items to be included in the bid. Click **OK** to close the Inventory Directory and add the inventory items to the bid. Click **Cancel** or ⧆ to close the Inventory Directory.

❏ Under **Bid Items**, the inventory bid 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 **Save** to save the bid. The bid status is changed to *N - Not Submitted*. Bid details can be viewed on the Warehouse > Inquiry > Bid Processing Inquiry page.

❏ Click **Submit** to submit the bid 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. 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 report. Review the report.
Delete	Click to delete the bid.
🗑	Click to delete an inventory item from the bid. The line item(s) is highlighted red to indicate that it will be deleted upon saving the record.

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