Create/Modify Bid- BWH3500

Table of Contents

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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:

<table>
<tr><td>Retrieve an existing record.</td><td>Search for a record.
<table><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>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.</td></tr>
</table>

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.
Distribute Freight Term	Click to replace the **Freight Term** field for each individual bid item with the selected **Freight Term** address. The freight terms are maintained on the Tables > Freight Terms page in District Administration.

Field	Description
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 X to close the Inventory 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. 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.
Save	❑ 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.
Submit	❑ Click **Submit**. The bid is transferred to the Request Vendor Quote page.

Other functions and features:

Retrieve	Retrieve data. The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Comment	Add comments to the bid. 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	Print the bid details. **Review the report using the following buttons**: Click First to go to the first page of the report. Click ◀ to go back one page. Click ▶ to go forward one page. Click Last to go to the last page of the report. **The report can be viewed and saved in various file formats**. 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.
Delete	Delete the bid. 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.
	Delete a row. 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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Back Cover