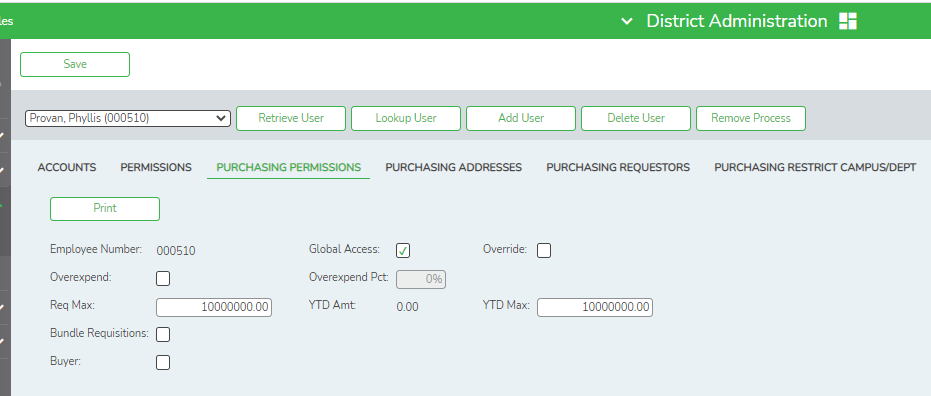
**Bid Processing in Purchasing**

The Create/Modify Bid page is used to create new bids and edit existing bids. The bids are submitted to vendors to solicit a quote on specific products. Requisitions with a credit card code cannot be added to a bid.

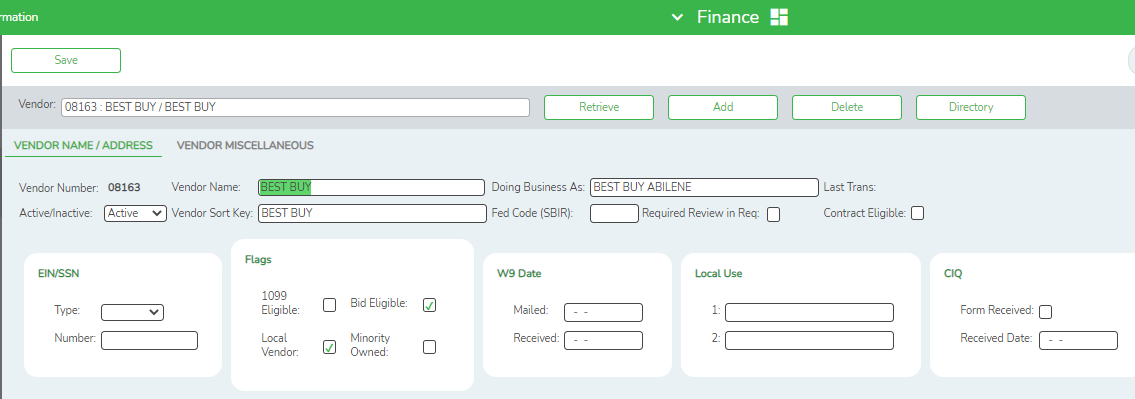
You can only view your created bids. However, if the Global Access field is selected on the **District Administration > Maintenance > User Profiles > Purchasing Permissions** tab in District Administration, you can view bids created by all users. Only the **final approver** in a selected workflow can create or modify a bid.



You will need to set up the Vendor Bid information in Finance.

**Finance > Maintenance > Vendor Information > Vendor Name/address tab**

By default, the Bid Eligible field is selected. Deselect the field if you wish to clear it.



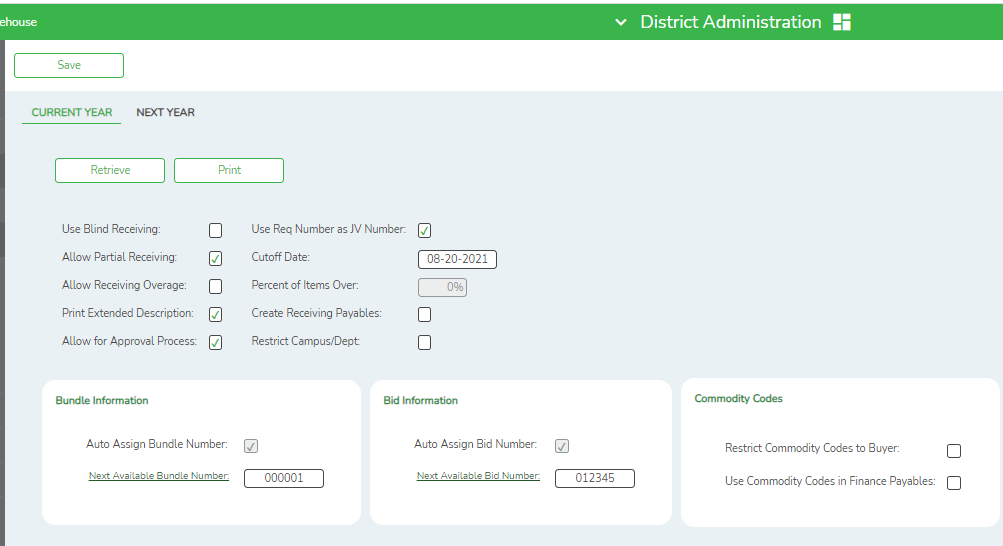
**To set up the Bid Number go to:**

**District Administration > Options > Purchasing/Warehouse Options**

Under Bid Information:

●      The **Auto Assign Bid Number** field is selected by default allowing the next bid number to be automatically assigned when using the bid processing feature in Purchasing. The option cannot be modified.

●      Click Next Available Bid N**umber** to select the next available bid number to be assigned in the Next Available Bid Number field, or type a number to find the next available number.



**To Create a new bid from existing requisition bid line items, or modify and existing bid.**

**Purchasing > Maintenance> Bid Processing > Create/Modify Bid**

To create a bid, click Add Bid.

1. Under Bid Information:

●      The **Bid Nbr** field displays AUTO 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.

●      The **Buyer** field displays the logged on user's name.

●      In the **Payment Terms** field, type the allowed payoff period (e.g., Net 30).

●      In the **Request Date** field, type the date you are requesting the bid in the MMDDYYY format. Or, select a date from the calendar.

●      In the **Date Open** field, 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.

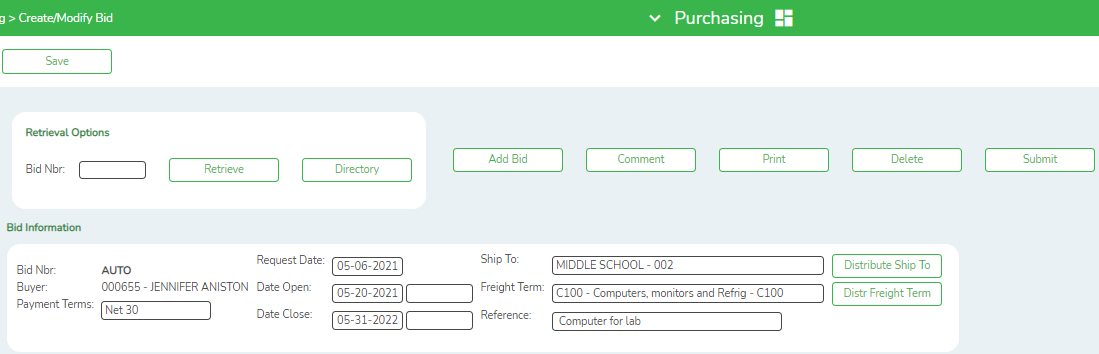
●      In the **Date Close** field, type the ending date for the bid in the MMDDYYYY format. Or, select a date from the calendar. In the blank field, type the begin time in the HH MM format.

●   In the **Ship To** field, 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.

●      Click **Distribute Ship To** to replace the **Ship To** field for each individual bid item with the selected **Distribute Ship To** address.

* In the **Freight Term** field, press the SPACEBAR to view and select a freight term from the drop-down list. The freight terms are populated from the **District Administration > Tables > Freight Terms** page.

●      In the **Reference** field, type the bid description.

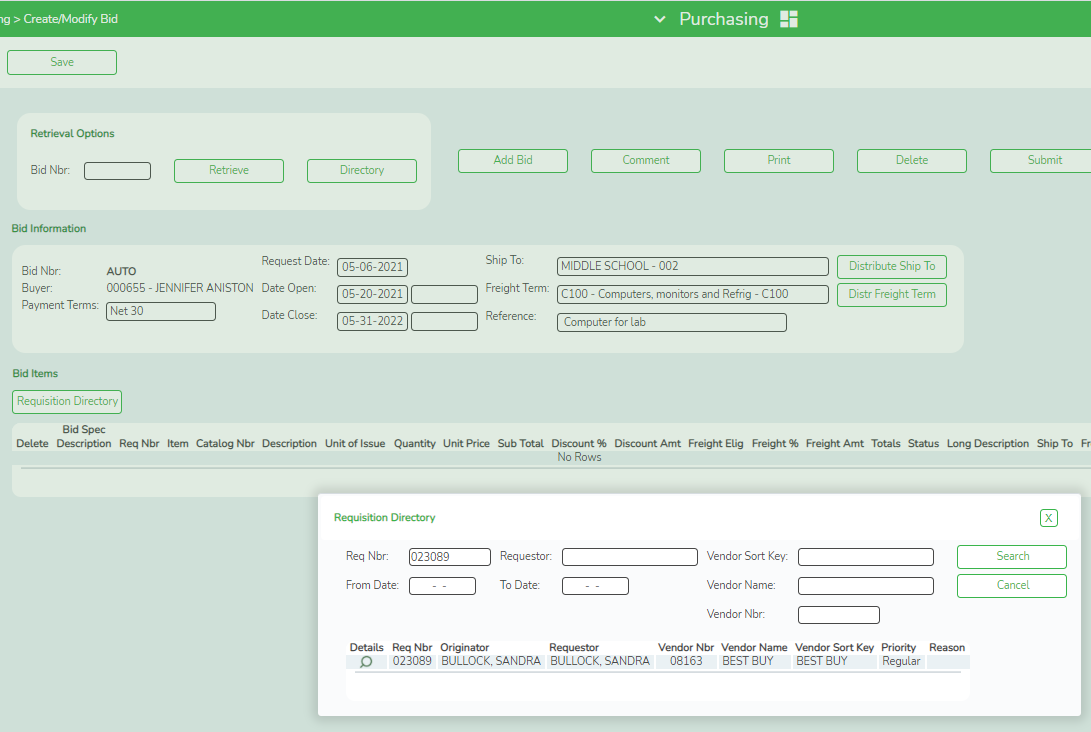


 2.. Click **Requisition Directory** to select a requisition to be added to the bid. The Requisition Directory is displayed. Only requisitions **pending final approval** from the logged on user are displayed.

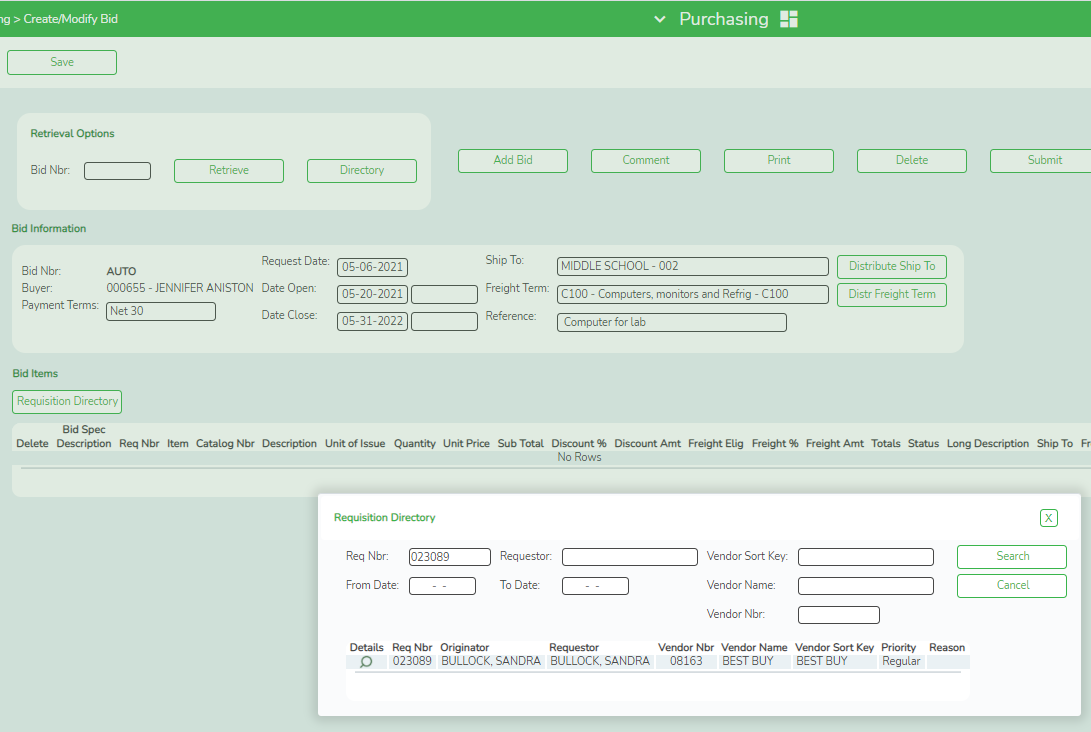
●      To search for a specific item, type data in the desired search fields.

●      To search through all available data, leave all fields blank.

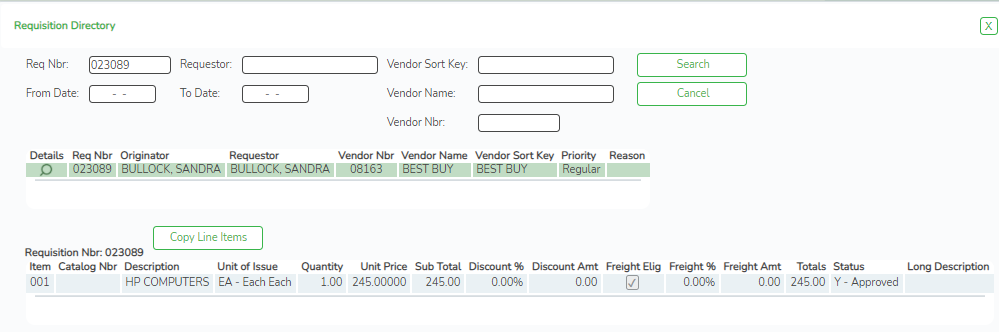
●      Click **Search**. A list of data that matches the search criteria is displayed.

****

●      Click https://txeisbeta.txeis14.net:8443/Purchasing/WebHelp/mag_edit.gif to view the line items for the selected requisition.

****

●      Click **Copy Line Items** to copy the line items from the requisition to the bid.

****

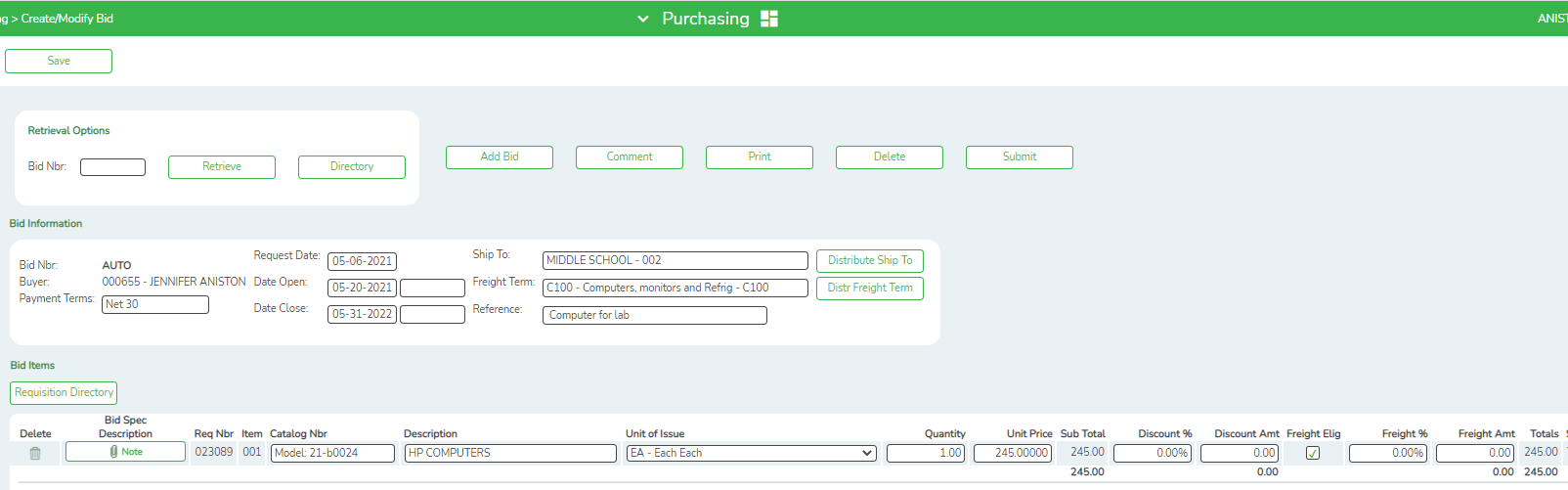
●      Click **Cancel** or **X** to close the Requisition Directory.

3.    Under **Bid Items**, the [requisition](https://txeisbeta.txeis14.net:8443/Purchasing/WebHelp/Purchasing/Maintenance/CreateModifyRequisition.htm) line item details are displayed.

●      Click **Note** to view or add bid notes. If notes exist, a paperclip icon is displayed on the **Note** button.

* 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.

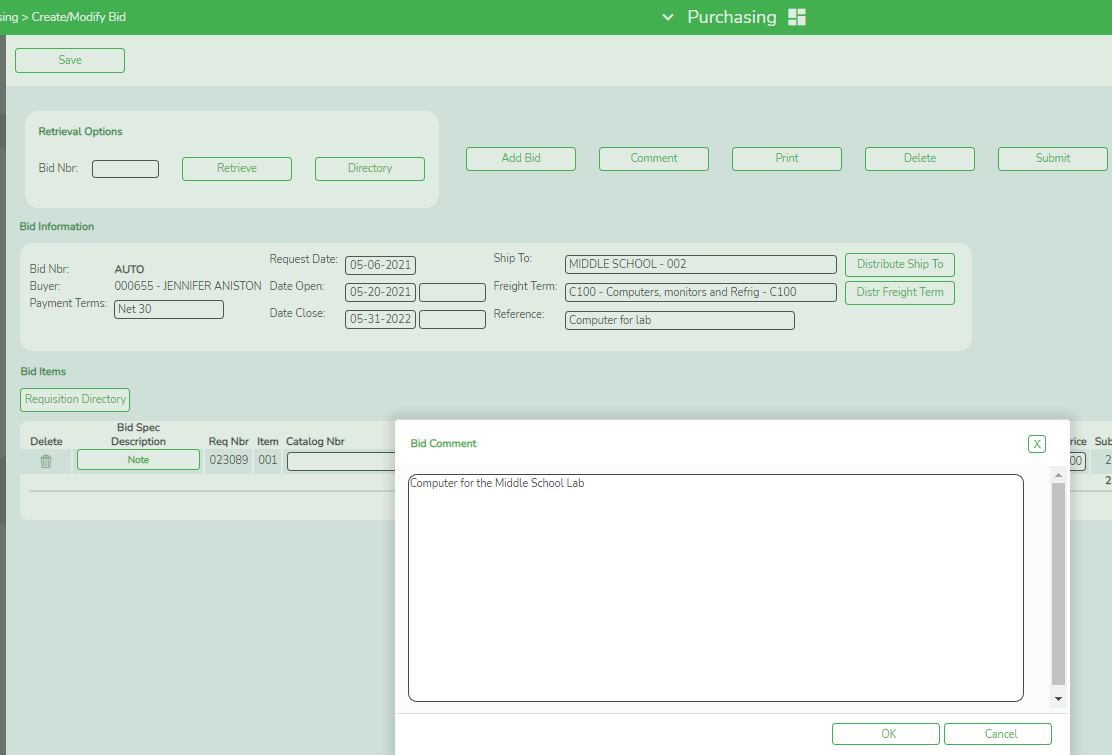
❏ Click **Submit**. The bid is transferred to the Request Vendor Quote page.



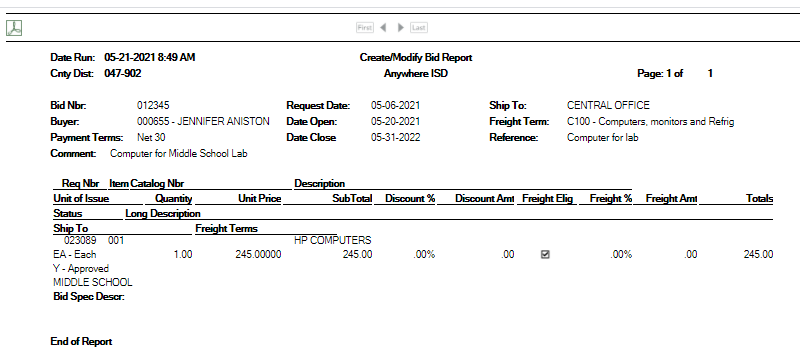
●      Click https://txeisbeta.txeis14.net:8443/Purchasing/WebHelp/trash_delete.gif to **delete** a requisition from the bid. The requisition line items are highlighted red to indicate that they will be deleted upon save.

**NOTE: 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.**

4.    Click **Comment** 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



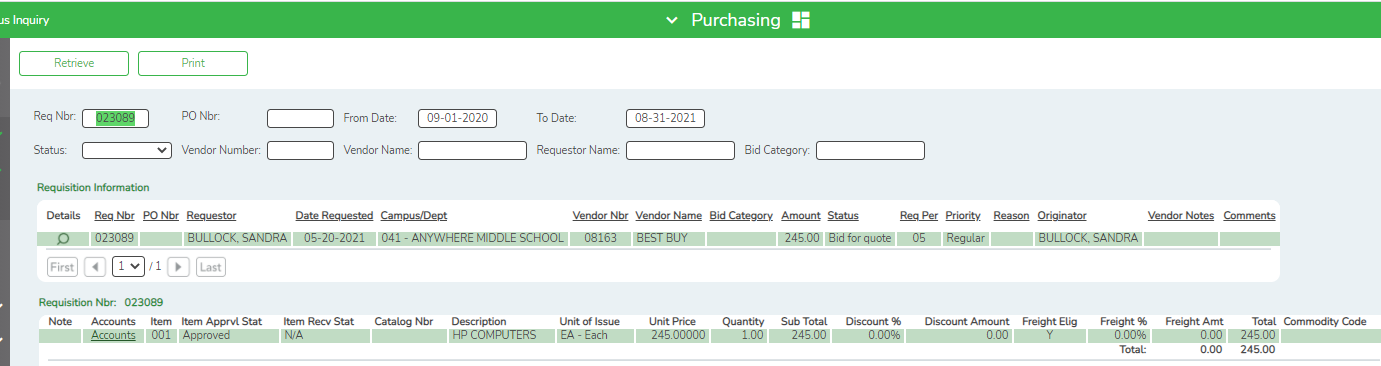
5.    Click **Print** to print the bid details on the page. **The report can be viewed and saved in various file formats**.  
  
Click [PDF Icon](https://help.ascendertx.com/test/business/lib/exe/detail.php/images/pdf_icon.jpg?id=general:printreport) to save and print the report in PDF format.  
Click [CSV Icon](https://help.ascendertx.com/test/business/lib/exe/detail.php/images/csv_icon.jpg?id=general:printreport) 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.



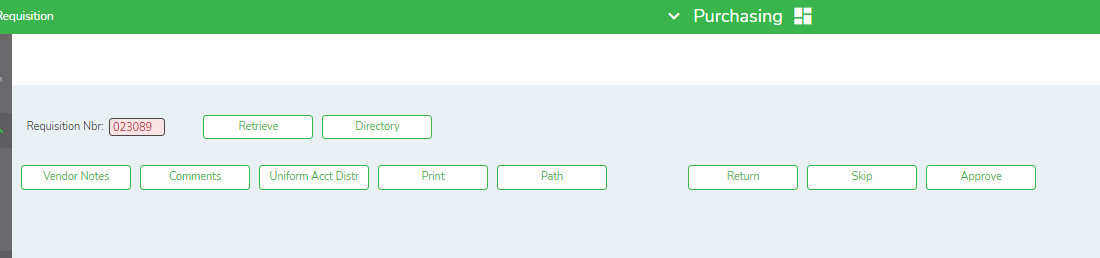
6.    Click **Delete** to delete a bid. All associated requisitions are updated with a P - Pending status. Requisitions can be viewed on the Purchasing > Inquiry > Requisition Status Inquiry page, and approved on the Purchasing > Maintenance > Approve Requisition page.

7.  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 Requisition Status Inquiry.

Purchasing > Inquiry > Requisition Status Inquiry



The requisitions **cannot** be retrieved or approved on the **Purchasing > Maintenance > Approve Requisition page.**

****

Shown at the bottom of the Screen

Shown at the bottom of the page

****

8.  Click **Submit** to submit the bid to the Request Vendor Quote page.

**You are able to select vendors to be solicited with a request for quotation (RFQ) for specific products.**

**Purchasing > Maintenance > Bid Processing > Request Vendor Quote**

The Request Vendor Quote page is used to submit a bid to a vendor to solicit a quote.

You can only view your created bids. 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

**To Request a Vendor Quote:**

1.    Under Retrieval Options, in the Bid Nbr field, type a bid number and click Retrieve. The field can be a maximum of six digits. Leading zeros are not required.

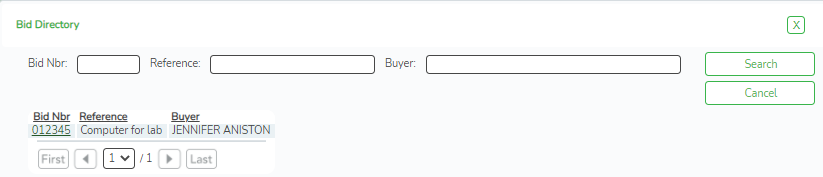
If the bid number is not known, click Directory.

●      To search for a specific item, type data in the desired 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 an item from the list. Otherwise, click Cancel.



2.    The Retrieve button is used to retrieve information from the last save. If you click Retrieve, any unsaved changes will be lost.

3.    Under Bid Information:

●      The Bid Nbr field displays the assigned bid number.

●      The Buyer field displays the logged on user's name.

●      In the Payment Terms field, type the allowed payoff period (e.g., Net 30).

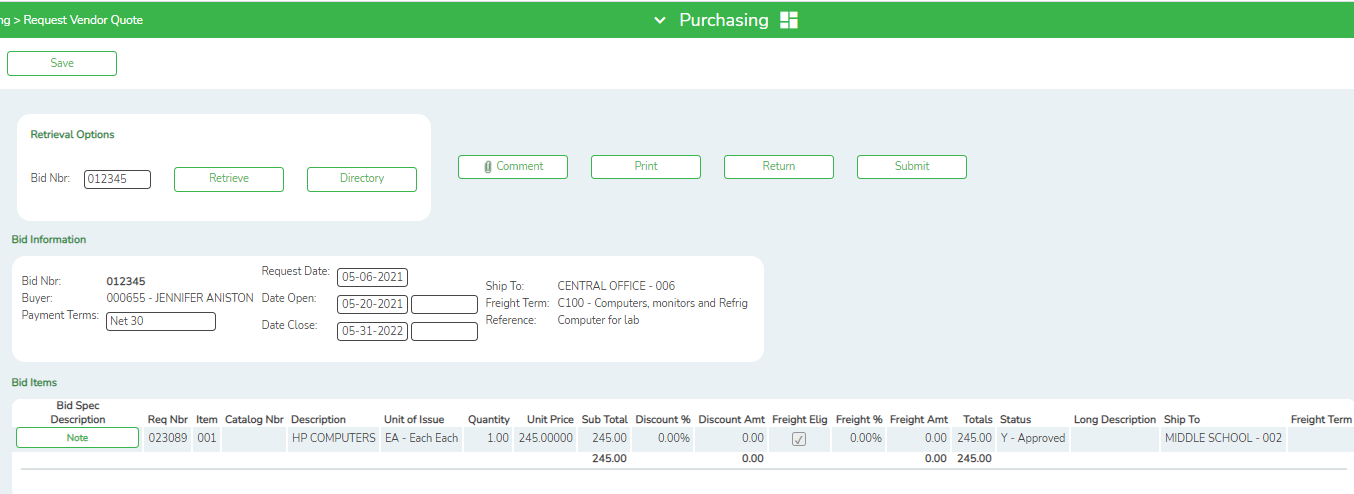
●      In the Request Date field, type the date you are requesting the bid in the MMDDYYYY format. Or, select a date from the calendar.

●   In the Date Open field, 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.

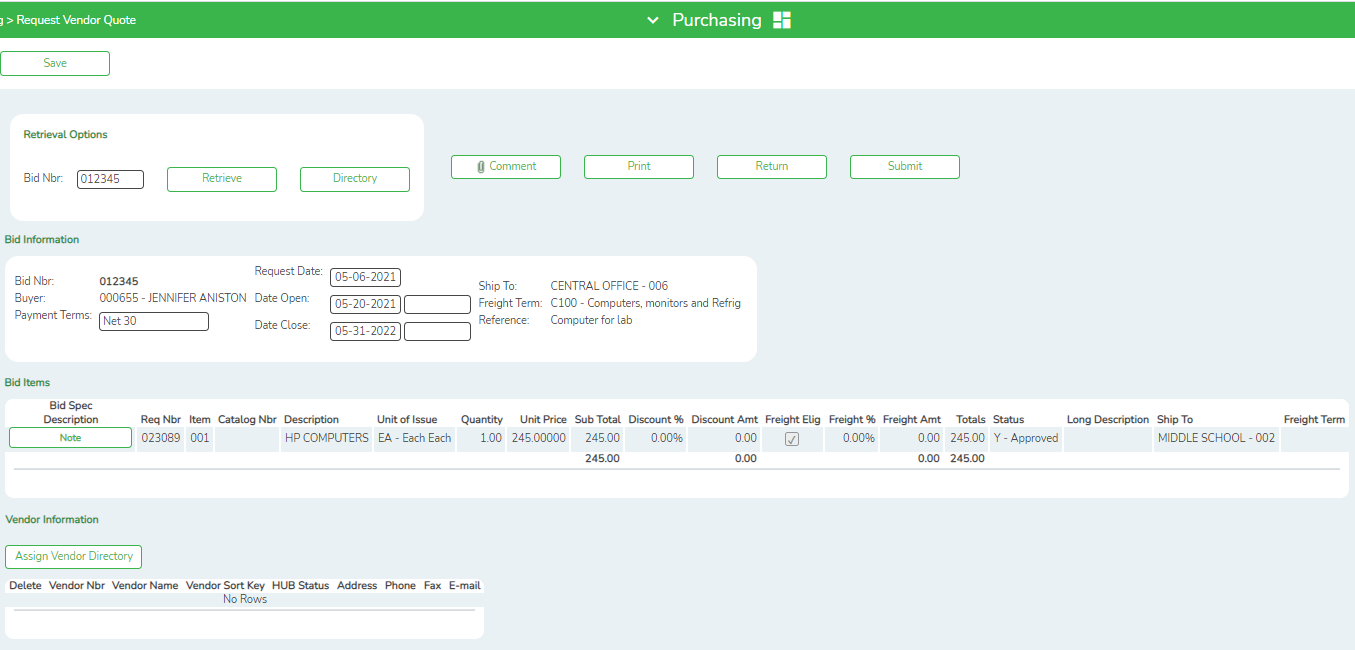
●    In the Date Close field, type the ending date for the bid in the MMDDYYYY format. Or, select a date from the calendar. In the blank field, type the begin time in the HH MM format.

●   The Ship To field displays the selected shipping address for the bid.

●    The Reference field displays the bid description.

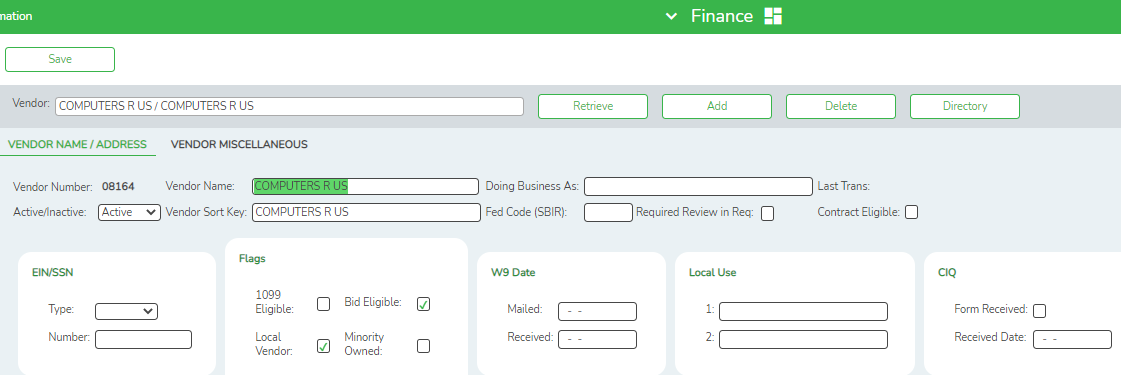


4.    Under Bid Items, the [requisition](https://txeisbeta.txeis14.net:8443/Purchasing/WebHelp/Purchasing/Maintenance/CreateModifyRequisition.htm) line item details are displayed and cannot be modified.



5. Only vendors with the Bid Eligible field selected on the Vendor Name/Address tab are displayed.

**Finance > Maintenance > Vendor Information > Vendor Name/Address**



6.    Click **Assign Vendor Directory** to select the vendors to be solicited. The Assign Vendor Directory is displayed.

**Purchasing > Maintenance > Bid Processing > Request Vendor Quote**

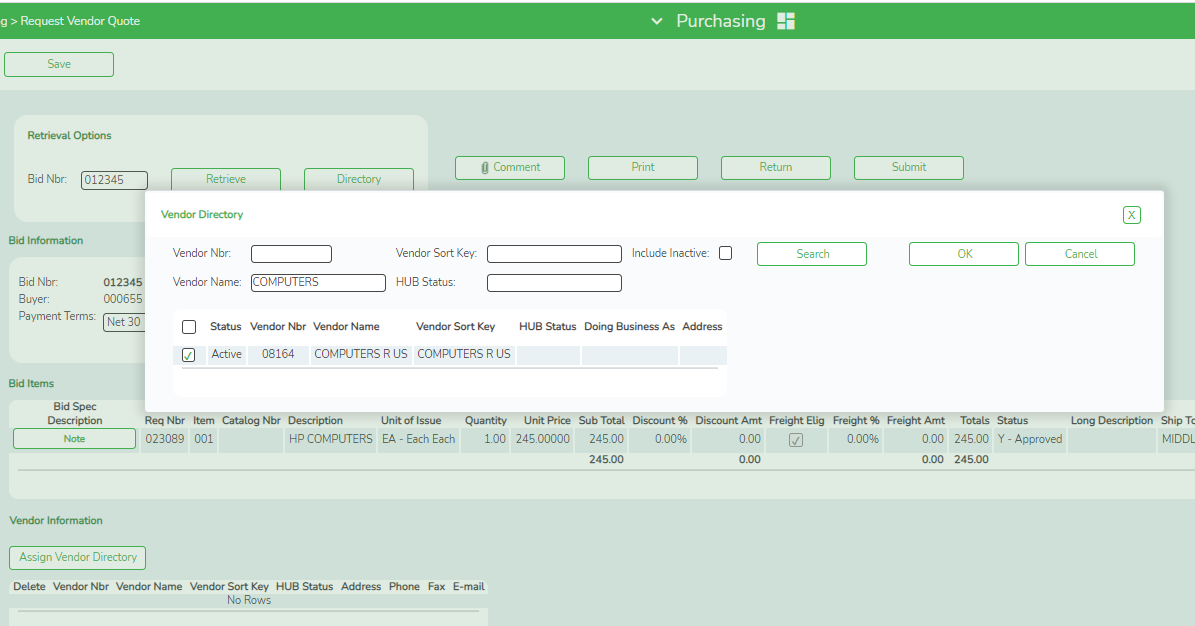
●      To search for a specific item, type data in the desired search fields.

●      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.



7.    Click Comment to view or add bid comments. 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.

8.    Click Print to print the bid details on the page.

9.    Click Return to return the bid to the Create/Modify Bid page.

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

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

