

Preparing a requisition with a bid tabulation:

Create Requisition

- 1. Define Requisition
- 2. Add Items and Services
- 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: University of North Texas

*Requester: Purchasing & Payment Services

*Currency:

Requisition Name:

Priority:

Line Defaults

Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Vendor: Vendor Location:

Buyer: Category: Unit of Measure:

Shipping Defaults

Ship To:

Due Date: Attention: SpeedChart Key

Accounting Defaults

Chartfields1 Details Asset Information

Location	GL Unit	Account	Alt Acct	Fund	Dept	Class	PC Bus Unit	Project	Activity	Source Type	Category	Subcategory	Fund Srce	Affiliate	Item Type
USB 13	NT752			21	53950	97	NT752						LOCAL		

Continue

1. Complete page 1 of the requisition as you normally would, except, do not indicate a vendor. Complete requisition name, due date, and enter the speedchart.

2. Complete page 2 of the requisition as you normally would. Complete item description, price, quantity, unit of measure and category code.

Create Requisition

- 1. Define Requisition
- 2. Add Items and Services
- 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: Search

Special Request Templates

Special Item

*Item Description:

*Price: *Currency:

*Quantity: *Unit of Measure:

*Category: Due Date:

Vendor ID:

[Suggest New Vendor](#)

Additional Information

Send to Vendor Show at Receipt Show at Voucher

Add Item Cancel Add or Start New Type

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: University of North Texas
*Requester: Purchasing & Payment Services Copy Bid Vendors
Requisition Name: Requisition ID: NEXT Priority:

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Item description		1.0000	Each	1.00000	1.00
						Total Amount: 1.00 USD

Select All / Deselect All

Justification/Comments

Send to Vendor Show at Receipt Show at Voucher

 Req needs vendor setup

2. Budget Check, which also saves the requisition.

1. Complete Page 3 as you normally would, adding attachments and completing the justification/comments.

3. Click on the bid tab icon.

1. When all bidders have been entered, click the appropriate bid awarded box to select your vendor.

Bidder #: 3 Bid Awarded [New Vendor?](#) + -

Vendor ID: 0000005575 Addr Seq Num: 1 Vendor Type:

Name 1: DALWORTH CHARTERS & TOURS

Address Line 1: 1925 E BELTLINE RD

Address Line 2: SUITE 101 Cntry: USA

City: CARROLLTON State: TX Postal: 75006

Phone Type:

Int'l Prefix: Phone: Ext:

Contact Name:

Amount: 5020.000 No Charge No Bid

Comments:

2. Save the bid tab

Save

Return

2. If the requisition has multiple lines, once the bid tab has been set up correctly on line one, click the "Copy Bid Vendors" button once.

Edit Requisition

[1. Define Requisition](#) [2. Add Items and Services](#) [3. Review and Submit](#)

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: University of North Texas
Requester: Purchasing & Payment Services [Copy Bid Vendors](#)
Requisition Name: **Requisition ID:** 0000073016 **Priority:**

Line	Description	Vendor Name	Quantity	UOM	Price	Total
<input type="checkbox"/> 1	Item #1	CANDY HAVEN	<input type="text" value="1.0000"/>	Each	1.00000	1.00
<input type="checkbox"/> 2	Item #2		<input type="text" value="1.0000"/>	Each	1.00000	1.00
<input type="checkbox"/> Select All / Deselect All						
						Total Amount: 2.00 USD
<input type="button" value="Add to Favorites"/> <input type="button" value="Add to Template(s)"/> <input type="button" value="Modify Line / Shipping / Accounting"/> <input type="button" value="Delete"/>						



Justification/Comments

 Send to Vendor Show at Receipt Show at Voucher

Budget Checking Status: **Valid** Req needs vendor setup







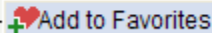
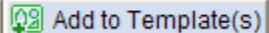
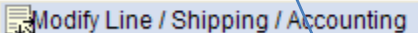
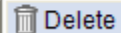
1. Save and Preview the requisition.

Edit Requisition

 [1. Define Requisition](#)  [2. Add Items and Services](#)  [3. Review and Submit](#)


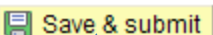
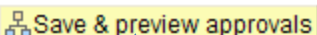
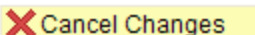
Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: University of North Texas
Requester: Purchasing & Payment Services [Copy Bid Vendors](#)
Requisition Name: **Requisition ID:** 0000073016 **Priority:**

Line	Description	Vendor Name	Quantity	UOM	Price	Total
<input type="checkbox"/> 1	Item #1	CANDY HAVEN	<input type="text" value="1.0000"/>	Each	1.00000	1.00   
<input type="checkbox"/> 2	Item #2	CANDY HAVEN	<input type="text" value="1.0000"/>	Each	1.00000	1.00   
<input type="checkbox"/> Select All / Deselect All						
   						
Total Amount:						2.00 USD

Justification/Comments

 Send to Vendor **Show at Receipt** **Show at Voucher**

 **Check Budget** Budget Checking Status: **Valid**
 **Save & submit**  **Save & preview approvals**  **Cancel Changes**

Req needs vendor setup

2. The requisition now has a valid vendor and valid budget, the "Save & Submit" button should be active. Be sure to "Save & Preview" instead to ensure correct routing or ad hoc if needed. "Submit" from the Confirmation page.

1. The information from the bid tab on line one has now been copied to each line of the requisition. You will need to visit each bid tab so that the amounts quoted specific to each line are accurately reflected.



When setting up a bid tab, all vendors providing a quote have to be active vendors in the vendor database. If, using the vendor look up screen in the bid tab, you are unable to find the vendor, you will need to click “New Vendor” which will open up the screen so that you can enter the suggested vendor’s contact information. Then, check the “req needs vendor setup” box on the “#3 Review and Submit” page, and “Save & Preview” the requisition. This will notify the vendor entity team that the vendor needs to be added to the database. Do not continue until Vendor Entity notifies you that the vendor has been set up.

Once the vendor entity team notifies you that the vendor has been set up, you will need to revisit the bid tab.

1. Delete the new vendor record by clicking the minus sign.
2. Follow the directions on slide #3 to pull in the newly added vendor to the bid tab.
3. Award the bid as shown on Slide #4
4. Save the edited bid tab.
5. If necessary, copy vendor to each line as shown on Slide #5/6

The screenshot shows a vendor setup form with the following fields and options:

- Bidder #:** 4
- Bid Awarded**
- [New Vendor?](#) (with + and - icons)
- Vendor ID:** [Empty]
- Addr Seq Num:** [Empty]
- Vendor Type:** [Dropdown]
- Name 1:** New Vendor
- Address Line 1:** New Vendor Address
- Address Line 2:** [Empty]
- City:** New Vendor City
- State:** TX
- Postal:** 12345
- Phone Type:** [Dropdown]
- Int'l Prefix:** [Empty]
- Phone:** [Empty]
- Ext:** [Empty]
- Contact Name:** [Empty]
- Amount:** 2500
- No Charge**
- No Bid**
- Comments:** [Text area]

Buttons at the bottom: **Save** and **Return**.