Infor Distributions A+ Bid & Quote User Guide

Version 11.00.02 and Higher

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Publication Information

Release: Infor Distribution A+ Bid & Quote User Guide

Publication date: June, 2026

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About this guide

This guide describes workflow, concepts and procedures for using the Infor Distribution A+ Bid & Quote module.

Related documentation

You can find related documentation at Infor Documentation Central (docs.infor.com). We recommend that you check this website periodically for updated documentation.

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at https://concierge.infor.com/ and create a support incident.

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Chapter 1 Bid & Quote Overview

The Bid & Quote module is a full-featured bid & quote package which provides you with the tools and functionality to acquire business by accepting, quoting, and finally winning bids submitted by vendors for your customers who have requested quotes.

Many wholesale distributors acquire business by accepting, quoting, and winning bids. The Bid & Quote module will provide you with the functionality to manage the processing of customer RFQs (request for quotes). This includes entering the customer's RFQ, selecting vendors who will be asked to bid on certain items, submitting one or more item requests for quotes to the selected vendors, entering the vendor's costs from their returned quote, entering the customer prices based on responses from vendors, submitting a quotation back to the customer indicating the quoted prices for each of the items you mark to submit to them, and finally approving and converting won items on a bid into vendor rebates.

Additional functions available with this module allow you to keep track of both open and closed bids, the steps that have taken place for bids and quotes, and the ability to print both vendor RFQs and customer quotations. You also will be able to inquire into open and closed bid detail, bid history, bid and quote summary by sales representatives, and item inquiries.

Distribution A+ Module Integration

In order to use Bid & Quote, you are required to be at a minimum of Distribution A+ version 3.02 and have the following modules installed on your system:

- Base package of Distribution A+:
  - Accounts Receivable
  - Inventory Accounting
  - Order Entry
  - Sales Analysis
- Purchasing

You may optionally use the following modules to interface with Bid & Quote:

- Order Entry
- Fax, if installed
- Mail Server, if installed

Note: See the Distribution A+ Modules Affected by Bid & Quote section of this chapter for Order Entry, Fax, and/or Mail Server for further details.

Features of Bid & Quote

This section highlights the features of Bid & Quote in support of bid and quote functions and processing. These features may or may not impact existing modules.

Bid & Quote Uses

The Bid & Quote module can be used for accepting and quoting bids submitted by customers, managing requests for quotes, managing bid and quote pricing, managing bid and quote responses, submitting customer quotes, approving and converting won items into vendor rebates. Additionally, you may track bid entry, maintenance and approval, inquire into RFQ history and open RFQs, and print RFQ summary/detail by vendor and customer reports.

Accepting and Quoting Bids

You can use Bid & Quote to accept and give quotes on bids for your customers. Through the functionality of Enter, Change, and Delete Bids (MENU BQMAIN), you have the ability to manage new bids, change existing bids, and also to delete existing bids.

- New Bid: New customer bids are added into Distribution A+ through Enter, Change, and Delete Bids (MENU BQMAIN). You have the ability to copy bid information and comments from existing bids by selecting the bid number of an appropriate existing bid and using the copy feature. You can additionally enter and/or update customer information for this bid, enter bid dates, create rebates, apply for rebates, enter item quantities, and vendor and customer pricing and discount information for any bid. For each bid you also will determine if a vendor rebate will be created for the customer and if that rebate will be applied for through A/R or A/P.
- Change/Update Bid: Distribution A+ gives you the flexibility to manage your existing bids. In order to tailor or rework its original presentation, your bids may be updated or changed at your discretion. Bid, customer, rebate, quantity, pricing and discount information for any bid may be updated. Additionally, when vendors return quotes, you can update costs and approve and/or reject items on the bid for each line/sub-line by using the **Vendor Approval Code** field on either the Add Item Screen or the Item Detail Maintenance Screen.
- Delete Bid and Quotes: Through the use of the **F24=DELETE** function key feature on the Bid & Quote Header Screen, you can easily delete a particular bid and all its related information.

Requests for Quotes (RFQ)

You can use Bid & Quote to manage the processing of customer requests for quotes. This includes entering the customer's RFQ, entering vendors who will be asked to bid on selected items, submitting one or more requests for quotes to the selected vendors, entering the vendor's costs and customer pricing based on responses from vendors, submitting a quotation back to the customer, and finally approving and converting won items into vendor rebates.

Bid and Quote Pricing

With Bid & Quote pricing, you can manage and update vendor costs for items on all bids, enter customer prices based on responses from vendors, and approve and convert won item prices into vendor rebates and won bids.

Bid & Quote supports two types of price agreements: 2-way price agreements and 3-way price agreements.

2-way Price Agreements

This type of Bid & Quote environment is used when there is a 2-way price agreement between the Distribution A+ distributor and the vendor. Approved items can be handled as a rebated item for all customers or can manually be entered as a vendor/item contract. Both vendor item contracts and rebates for all customers must be maintained separately.

3-way Price Agreements

This type of Bid & Quote environment is used when there is a 3-way price agreement between the customer, the Distribution A+ distributor, and the vendor. The agreements are for specified time periods (a date range). PO's to the vendor are placed to fulfill general demand (for all customers) at normal pricing. After customer orders are taken, shipped, and invoiced, the distributor then applies for a rebate for customers/items with bid agreements.

Submitting RFQ to Vendor

Through the use of Print Vendor RFQs (MENU BQMAIN) in Bid & Quote, you are able to print or fax a request for quotation to all vendors for one or more bids. In addition to printing or faxing, you can e- mail the request.

Additionally, you have the capability to print or fax the quotation back to your customer. This document contains only items you have approved from your vendors and for which you have entered

a customer price. For customer approved quotation prices, you have the capability to post the customer's approved bids into the Rebate File.

Bid Approval

Once an item has been approved or rejected by the customer, you have the ability to mark items as won and rejected items as lost through Enter, Change, Delete Bids (MENU BQMAIN). Once you have printed or faxed the quotation back to the customer and received their response, each item is then marked as approved (**Y**) by the customer or rejected (**N**). Later, this vendor's cost and quoted customer price will be converted into a rebate during the Close Bid process.

Bid & Quote Tracking

With Bid & Quote, you will be able to track bids and quotes, the steps that have taken place for each bid and quote, and the costs and pricing that are associated with each bid and quote. Also, through the use of requests for quotes from vendors, customer quotes, won/lost codes, you will be able to track and manage all of your bids.

Management tools include the following:

- Vendor approval code
- Customer approval code
- Customer lost reason code
- Lost reason code
- Bid status
- Bid type
- Hold reason code

Bid Status

In order to track bids from their inception until their closing, the following bid status types are used in the bid and quote process:

RFQ Ready

The customer bid has been entered, items have been assigned to vendors, and you are ready to send the request for quotes to the appropriate vendors.

RFQ Printed

The customer bid has been entered, items have been assigned to the bid, and you have printed and/or faxed the request for quotes to the appropriate vendors.

Quote Ready

The appropriate vendors have received the request for quotes and have returned bids with their cost information, you have marked all line/sub-lines as vendor approved/rejected (Y or N), and all vendor approved line/sub-lines have had item customer pricing information entered.

Quote Printed

The sell price has been determined, all vendor approved line/sub-lines have had item cost information entered, and you have printed and/or faxed the quote to the customer.

Approved/Rejected

The customer has received the quote, returned it to you, and you have marked all applicable line/sub- lines as customer approved/rejected.

Closed

All line/sub-lines of the quote have been marked as customer approved/rejected and you have closed the bid through Close Bids (MENU BQMAIN).

Held-XX

The bid has been placed on hold on the Bid & Quote End Screen, XX representing the hold code used to put the bid on hold.

Distribution A+ Modules Affected by Bid & Quote

A summarization of the modules affected by Bid & Quote follows.

Order Entry

Rebates are utilized through order entry to adjust an item's cost and optionally pass on to customers rebates provided to the distributor. Through the Bid & Quote Rebate Customers List Screen, you are able to either select customers to be included in a rebate or to select customers to be excluded from any rebates.

Order Entry Rebates

Order Entry has been enhanced to provide additional functionality to accommodate Bid & Quote. Through the use of the Order Entry Rebate Main Menu (MENU OEREBT), you have the ability to access the following rebate processing:

- Rebate Master Maintenance
- Customer Rebate Classes
- Item Rebate Classes
- Rebate Master Listing
- Customer Rebates Classes Listing
- Item Rebates Classes Listing
- Pending Rebate Report

Bid & Quote Rebates

Additionally, order entry has been enhanced to provide for the following bid and quote rebate features:

- Bid number and description added to the Bid & Quote Rebate Customers List Screen
- Bid & Quote company/customer inclusion

When the bid and quote process is complete, bid items have been approved and converted into vendor rebates for the customer who requested the original quote, the normal order entry process is then performed. The vendor rebates for the won item will be available to the customer until the bid end date entered on the Bid & Quote Header Screen expires.

Fax

Bid & Quote interfaces with the Fax module through Fax Systems Options Maintenance (MENU AXMAIN), allowing Vendor RFQs, and Customer Quotes responses to be faxed to both customers and vendors.

Mail Server

Bid and Quote interfaces with the Mail Server module to allow Vendor RFQs and Customer Quotes to be e-mailed to vendors and customers automatically if the vendor and/or customer is set up with an e- mail address. Customer e-mail address are defined through Customer/Ship to Master Maintenance (MENU ARFILE). Vendor e-mail addresses are defined through Vendor Master Maintenance (MENU POFILE).

If a customer or vendor is not set up to receive these documents automatically, they can be e-mailed on an individual basis from the following options:

- Enter, Change, Delete Bids (MENU BQMAIN)
- Print Vendor RFQs (MENU BQMAIN)
- Print Customer Quotes (MENU BQMAIN)

In addition, any report or listing that prints through the Report Options Screen and any document that can be faxed can be e-mailed. For a description of this screen, refer to the Infor Distribution A+ Cross Applications User Guide.

Inquiries

Bid & Quote is comprised of the Item Inquiry and the Open/Closed Bid Inquiry.

Item Inquiry

The Item Inquiry allows you to inquire into detailed information for all items defined in Distribution A+. Through this option, you may also access inventory status information, transaction history, sales statistics, sales analysis, buying information, item summary information, and item replacement/ complement information.

Open/Closed Bid Inquiry

The Open/Closed Bid Inquiry allows you to access information for bids, including both open bids and those in history. You also may allocate or release bids through this inquiry.

Description of Work Flow

This section provides a description of the work flow process that generally takes place when performing bid processing using this module. It will begin with the creation of a bid and continue through the closing of the bid.

1. Enter a bid

The first step to Bid & Quote processing is creating a bid and the options associated with it.

- Use Enter, Change, and Delete Bids (MENU BQMAIN) to manually create a bid.
- Header information presented in Enter, Change, and Delete Bids includes, but is not limited to, the following:
  - Bid description, warehouse ID, company number, customer number, customer information, date due to customer, date due from vendor, date of bid opening, renewal of bid number, salesrep number, rebate information, RFQ information, bid start date, bid end date, and rebate date code.

    Additionally, you may include or exclude customers from rebates through the Bid & Quote Customer Exclude Screen.
- Continue the bid by manually entering items, that the customer requested, for which you wish vendors to submit a quote. Then determine what vendors will quote on the items.
- Vendor detail information presented in Enter, Change, and Delete Bids includes, but is not limited to, the following:
  - Vendor number, name, contact, phone, RFQ printed **Y** or **N**

  Rebate detail information presented in Enter, Change, and Delete Bids includes, but is not limited to, the following:
  - Bid number and description

2. Print Vendor RFQs

Vendor RFQs are printed through Print Vendor RFQs (MENU BQMAIN). You have the option to print or fax all vendors for the selected bid or a specific vendor that has not been previously been printed. In addition to printing and faxing, you can e-mail the Vendor RFQ to the vendor.

Vendor RFQ detail information presented on this report includes, but is not limited to, the following:

- Company Name
- Request For Quotation
- Warehouse Number
- Bid Number and Description
- Vendor Information

- Print Date and Time
- Bid Opening Date
- Bid Start and Expiration Date
- Date Due from Vendor

Note: All dates will be printed on the Vendor RFQ using the **Date Format** specified for the vendor's country through Country Name Maintenance (MENU ARFIL2). If that field is blank, the dates will be printed using the system's **Default Date Format** specified through System Options Maintenance (MENU XAFILE).

3. Vendor Approval Code

Once Vendor RFQs have been sent and the vendors have responded, each line/sub-line and its corresponding cost on the bid must be marked as vendor approved/rejected, using the **Vendor Approval Code** field in Enter, Change, Delete Bids (MENU BQMAIN). An approved line is a quoted cost that's acceptable to the distributor. A rejected cost is a cost that is unacceptable. Only those line/sub-lines marked as vendor approved will be included in the Customer Quote that is sent back to the original customer who requested the quote.

4. Print Customer Quotes

Customer Quotes are printed through Print Customer Quotes (MENU BQMAIN). You have the option to print or fax customer quotes. In addition to printing and faxing, you can e-mail the Customer Quote.

Customer quote detail information presented on this report includes, but is not limited to, the following:

- Company Name
- Quotation
- Bid Number and Description
- Customer Information
- Print Date and Time
- Bid Opening Date
- Bid Start and Expiration Date
- Item Number
- Quantity
- Customer Unit Price
- Customer Extended Price
- Price U/M
- Item Information

- Item Comments

Note: All dates will be printed on the Customer Quote using the Date Format specified for the customer's country through Country Name Maintenance (MENU ARFIL2). If that field is blank, the dates will be printed using the system's Default Date Format specified through System Options Maintenance (MENU XAFILE).

5. Close Bids

Once the customer has approved/rejected the line/sub-lines of the bid and returned this information to you, you must mark the Customer Approval Code field on each line/sub-line as approved or rejected through Enter, Change, Delete Bids (MENU BQMAIN). When this process is complete, you may then close the bid to apply the won items (items approved by the customer) into vendor rebates.

To close a bid, use Close Bids (MENU BQMAIN). This option is also used to print the Bid & Quote Rebate Update Report for a listing of approved/rejected lines by vendor number. If rebates are not to be used, you can use this report to key in vendor contracts or to key order entry contracts or sales orders. Additionally, you may use this option to post a bid to the Rebate File if the status of the bid is "Customer Approved."

Menus of Bid & Quote

A brief description of the menus that make up the Bid & Quote module follows.

MENU BQMAIN

This menu allows you to:

- Enter, Change, and Delete Bids
- Close Bids
- Inquire Into Items
- Inquire Into Open/Closed Bids
- Print Vendor RFQs
- Print Customer Quotes
- Access Bid & Quote Report Menu

MENU BQREPT

- This menu is used to generate and print various Bid & Quote reports. This menu allows you to print the following reports:
- Bid/Quote Worksheet
- Bid Detail by Buyer/Vendor/Item
- Bid Summary By Salesrep

Chapter 2 Entering, Changing, and Deleting Bids

You can enter, change, and delete bids through Enter, Change, Delete Bids (MENU BQMAIN).

A bid consists of a request from one or a group of customers in order to quote prices of one or more items based on costs quoted from one or more vendors. Through this option, you may enter a new bid, change/update information for an existing bid, or delete a bid.

When adding a new bid, you may copy information from an existing bid. For each item, you may enter one or more vendors that you want to quote on that item. You may optionally enter alternate/ replacement items to be quoted by vendors.

Vendor costs are entered for each vendor after you have printed, faxed the RFQ to the vendor and received a response. Customer quote prices are entered. Once you have printed, faxed, or e-mailed the quote back to the customer and received their response, you must mark each item as approved (won) by the customer or rejected (lost).

You can use the Specify Item Detail Limits Screen to limit the bid items that display on the Add Item Screen and the Item Detail Maintenance Screen. This is used in order to display and/or mark specific item line/sub-lines as customer approved/rejected or vendor approved/ rejected.

If Customer Consignment is installed, this option cannot be used for consignment warehouses.

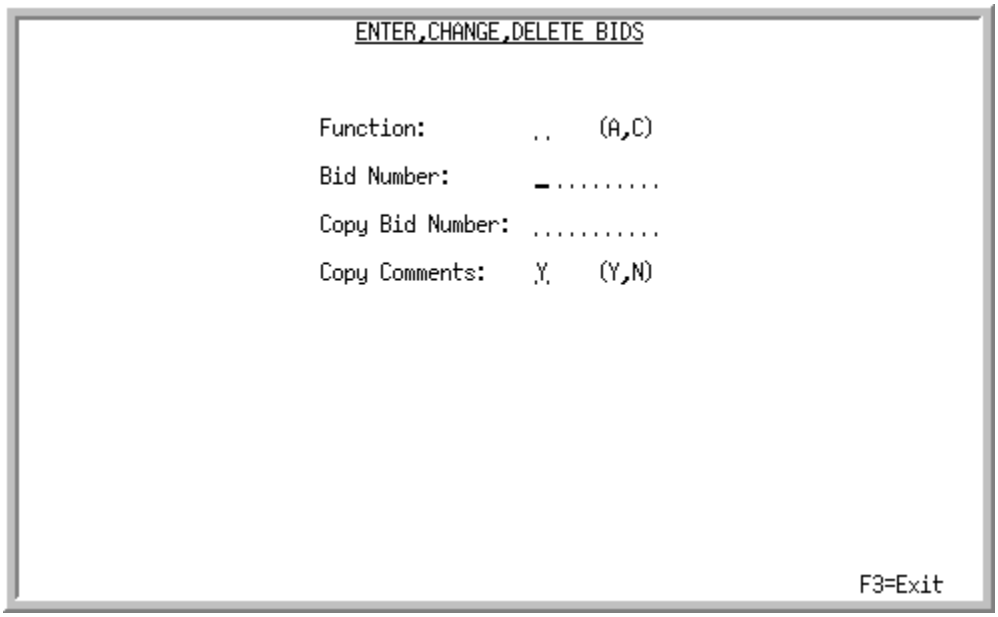
Enter, Change, Delete Bids

The screens and/or reports in Enter, Change, Delete Bids and a brief description of their purpose are listed in the following table. A complete description of each is provided in this section.

Title	Purpose
Enter, Change, Delete Bids Selection Screen	Used to add or change a bid.
Bid & Quote Header Screen	Used to enter customer bid information for the selected bid.
Vendor Listing Screen	Used to display a list of vendors who have been assigned to this bid.
Vendor Information Override Screen	Used to review and/or override vendor information for the selected vendor for this bid.

Title	Purpose
Enter/Change Bid Header Comments Screen	Used to enter/review bid header comments for the bid being processed.
Enter/Change Line Item Comments Screen	Used to enter/review line-item comments for an item.
Bid & Quote End Screen	Used to display a summary of the bid.
Bid & Quote Customer Exclude Screen	Used to select customers to be excluded from rebates.
Add Item Screen	Used to enter items on the bid.
Vendor List Screen	Used to create a vendor list for the vendors.
Item Detail Maintenance Screen	Used to perform maintenance and/or enter cost information for an item.
Original Cost Screen	Used to select the Average, User, Standard, or Last cost of the item.
Bid & Quote Replacements Selection Screen	Used to select replacement items for an item.
Bid & Quote Replacements Comments Screen	Use to review the comments that explain the replacement relationship between the items.
Specify Item Detail Limits Screen	Used to limit the items that display on the Add Item Screen and/or the Item Detail Maintenance Screen.

Enter, Change, Delete Bids Selection Screen



This screen appears after selecting option 1 - Enter, Change, Delete Bids from MENU BQMAIN. Use this screen to add or change a bid. For new bids, you may select to copy existing bid information and bid comments for an existing bid.

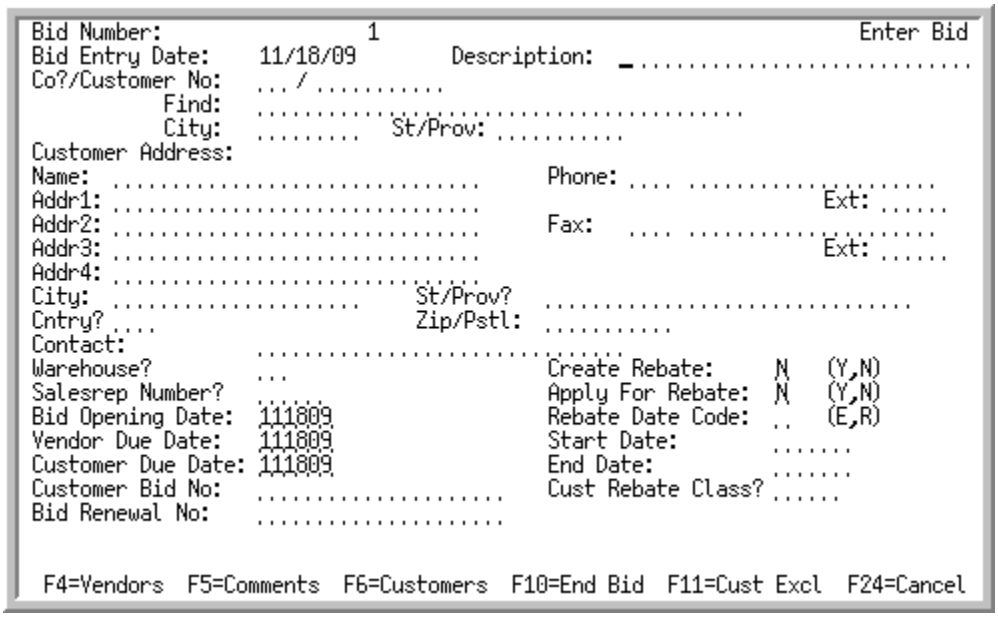
Note: Key C in the Function field and enter the desired bid number in the Bid Number field to delete an existing bid. The Bid & Quote Header Screen will display, where you may use the F24=DELETE key to delete the selected bid number.

Enter, Change, Delete Bids Selection Screen Fields and Function Keys

Field/Function Key	Description
Function	Use this field to key the type of function you wish to perform for this bid. Key **A** to add a new bid. Key **C** to change or delete an existing bid. **Note:** Each bid number may be added through this option only once. This is applicable even if a bid number is closed through Close Bids (MENU BQMAIN). Additionally, a closed bid or a bid that is being maintained at another work station cannot be selected for change. (A 1) Required

Field/Function Key	Description
Bid Number	This field reflects the bid number you wish to add, change, or delete. You may key a new bid number or let Distribution A+ automatically assign a bid number if you are adding a new bid. Automatically assigned bid numbers are assigned as numerical values. Key the appropriate bid number. Leave this field blank if you are adding a new bid and you want Distribution A+ to automatically assign this bid number. (A 10) Optional
Copy Bid Number	Use this field when adding a new bid to copy bid information from an existing bid. This bid information will automatically be assigned to the bid you are adding. **Note:** Quote prices and item costs will not be copied to a new bid when using this function. Additionally, approval codes and lost reason codes will be blanked out. The entry date, opening date, vendor due date, and customer due date will default to today's date. **Note:** The rebate start date will default to zero. The rebate end date will default to 9s. Key the appropriate existing bid number. **Valid Values:** An existing bid number previously entered through this option. (A 10) Optional
Copy Comments	Use this field to copy comments from a bid, if you entered a bid number in the Copy Bid Number field. This field allows you to copy comments from the bid you are copying or to omit those comments from the copy function. Key Y if you want to copy comments to the bid you are adding. Key N if you want to omit comments to the bid you are adding. **Default Value:** Y (A 1) Optional
F3=Exit	Press **F3=EXIT** to cancel this option. MENU BQMAIN will display.
Enter	Press **ENTER** to confirm your selections. The Bid & Quote Header Screen will display, where you may perform maintenance or enter new bid information.

Bid & Quote Header Screen



This screen displays after pressing **ENTER** from the Enter, Change, Delete Bids Selection Screen or by pressing **F2=HEADER** from the Bid & Quote End Screen.

Use this screen to enter customer bid information for the selected bid. You can also define a Vendor Listing for the vendors you wish to include for the selected bid, access Bid & Quote comments, customer lists, and customer exclusions from the bid.

Bid & Quote Header Screen Fields and Function Keys

Field/Function Key	Description
(Bid Number Information)	The following bid number information displays in the upper portion of this screen: • **Bid Number**: This field displays the bid number assigned on the Enter, Change, Delete Bids Selection Screen for the selected bid. • **Bid Entry Date**: This field displays the date the selected bid was created. Display

Field/Function Key	Description
Description	This field represents the bid description for the selected bid. If you selected to copy an existing bid to a bid you are adding, this field will display the bid description. You may change this entry. If you are adding a new bid, without copying an existing bid, use this field to enter a bid description for the selected bid. Key the appropriate bid description for the selected bid. (A 30) Required
Co/Customer No	This field displays the primary company and customer number that the bid information for this new bid was copied from. This field will be blank when adding a new bid. Use this field to enter the primary company and customer when adding a bid. If you do not know the customer number, use the **Find**, **City**, and **St/Prov** fields to activate the Customer Search feature. Key the primary company and customer for this bid. (N 2,0 / N 10,0) Display/Required
Find	Use this field either alone or with the **City** and **St/Prov** fields to search for the customer by name, phone number, and zip/postal code. Key one or more of the following separated by one blank space: • up to 10 characters (the first 10) of one or more words in the customer's name. Key the words in any order. • up to 10 characters (the first 10) of the PO contact's phone number, excluding the country code and delimiters. • up to 5 (the first 5) characters of the customer's zip/postal code. Press **ENTER** to activate the Customer Search feature. Refer to the Introduction section of the Infor Distribution A+ Cross Applications User Guide for an explanation of the search feature. (A 40) Optional
City	Use this field either alone or with the **Find** and **St/Prov** fields to search for a customer in a particular city. Key up to 8 characters (the first 8) of the customer's city. Press **ENTER** to activate the Customer Search feature. Refer to the Introduction section of the Infor Distribution A+ Cross Applications User Guide for an explanation of the search feature. (A 8) Optional

Field/Function Key	Description
St/Prov	Use this field with one or both of the Find and City fields to search for a customer in a particular state/province. Key up to 10 characters (the first 10) of the state or province code. Press **ENTER** to activate the Customer Search feature. Refer to the Introduction section of the Infor Distribution A+ Cross Applications User Guide for an explanation of the search feature. (A 10) Optional
Name	Key the name of the customer or accept the default. **Default Value:** The name specified for the customer through Customer/Ship to Master Maintenance (MENU ARFILE). (A 30) Required
Addr 1 - Addr 4	You can use the **Addr 4** field only if **Form Type** is 2 in System Options Maintenance (MENU XAFILE). Key the street address, post office box number, or other address information except for the city, state/province, country, and zip/postal code which are specified in the fields below. **Default Value:** The address information specified for the customer through Customer/Ship to Master Maintenance (MENU ARFILE). (4 @ A 30) Required
Phone/Ext	Blank spaces are allowed between numerals only if **Allow Blank Phone Delimiters** is Y in Systems Options Maintenance (MENU XAFILE). In the **Phone** field, key the customer's telephone number, which includes a 3- character country access code followed by the area code and telephone number. For example: 011 (781) 555-1212. For more information, refer to Phone and Fax Number Delimiters in the Introduction of the Infor Distribution A+ Cross Applications User Guide. In the **Ext** field, key the telephone extension of the contact person. **Default Value:** The telephone and extension number specified for the customer through Customer/Ship to Master Maintenance (MENU ARFILE). **Valid Values:** Numerals and the following symbols: - ( ) /. (N 3,0 / N 20,0 / N 4,0) Optional

Field/Function Key	Description
Fax/Ext	Blank spaces are allowed between numerals only if **Allow Blank Phone Delimiters** is Y in Systems Options Maintenance (MENU XAFILE). In the **Fax** field, key the customer's fax number, which includes a 3-character country access code followed by the area code and telephone number. For example: 011 (781) 555-1212 For more information, refer to Phone and Fax Number Delimiters in the Introduction of the Infor Distribution A+ Cross Applications User Guide. In the **Ext** field, key the telephone extension for the fax machine. **Default Value:** The fax and extension number specified for the customer through Customer/Ship to Master Maintenance (MENU ARFILE). **Valid Values:** Numerals and the following symbols: - ( ) /. (N 3,0 / N 20,0 / N 4,0) Optional
City	Key the customer's city. **Default Value:** The city specified for the customer through Customer/Ship to Master Maintenance (MENU ARFILE). (A 20) Optional
St/Prov	Key the customer's state or province. **Default Value:** The state or province specified for the customer through Customer/Ship to Master Maintenance (MENU ARFILE). **Valid Values:** A state or province code defined through State/Province Codes Maintenance (MENU OEFIL3) if Validate State/Province is Y in Systems Options Maintenance (MENU XAFILE). (A 30) Optional
Cntry	Key the customer's country code. **Default Value:** The country code specified for the customer through Customer/Ship to Master Maintenance (MENU ARFILE). **Valid Values:** A valid country code defined through Country Names (MENU POFILE). (A 3) Optional
Zip/Pstl	Key the customer's zip or postal code. **Default Value:** The zip or postal code specified for the customer through Customer/Ship to Master Maintenance (MENU ARFILE). (A 10) Optional

Field/Function Key	Description
Contact	This field represents the name of the contact person for the customer requesting the bid being processed. Key the appropriate contact person. (A 30) Optional
Warehouse	This field represents the warehouse for which rebates will be valid for the bid being processed. If this field is left blank, rebates will be valid for all warehouses. If a warehouse is entered in this field, rebates will only be valid for this warehouse. Key the appropriate warehouse you want to limit this rebate to. Leave this field blank to include all warehouse in this rebate. **Valid Values:** A warehouse defined through Warehouse Numbers Maintenance (MENU IAFILE) that is not a consignment warehouse. (A 2) Optional
Salesrep Number	This field represents the salesrep number of the primary sales representative associated with the customer requesting the bid being processed. Key the appropriate sales representative. **Valid Values:** A valid sales representative defined through Salesrep Maintenance (MENU SAFILE). (N 5,0) Required
Bid Opening Date	This field represents the date this bid is to be open to participating vendors. Key the appropriate bid opening date. **Default Value:** Today's date. **Valid Values:** A date that falls before the date entered in the Customer Due Date field. Key the date using the Default Date Format for this user, specified through Register A+ User IDs (MENU XACFIG). If that field is blank, key the date using the system's Default Date Format specified through System Options Maintenance (MENU XAFILE). (N 6,0) Required

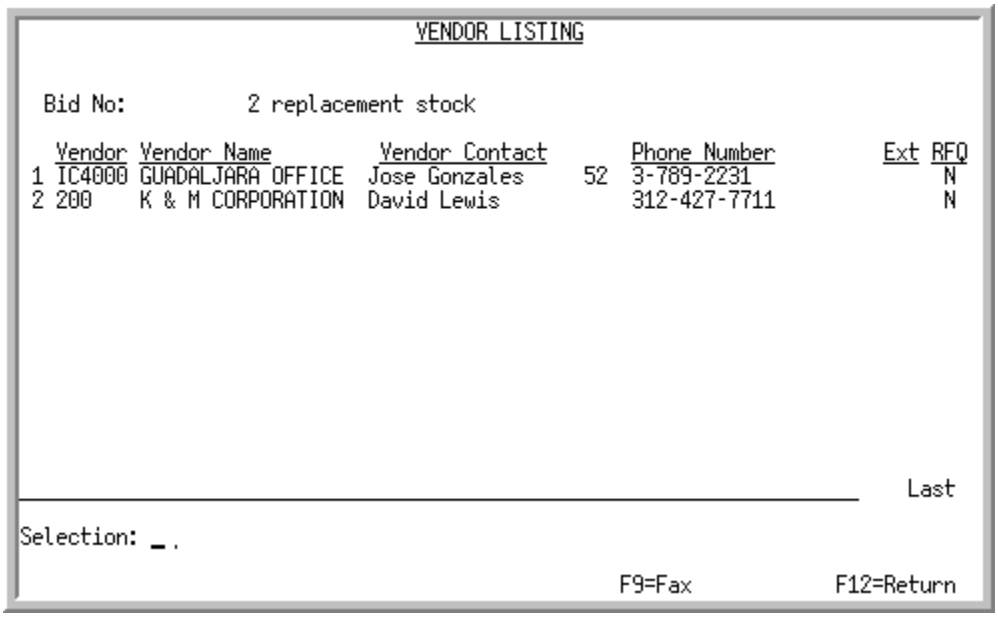
Field/Function Key	Description
Vendor Due Date	This field represents the date this bid is due back from the associated vendors for the bid being processed. Key the appropriate vendor due date. **Default Value:** Today's date. **Valid Values:** A date that falls on or after the entry date and before the **Customer Due Date** for this bid. Key the date using the **Default Date Format** for this user, specified through Register A+ User IDs (MENU XACFIG). If that field is blank, key the date using the system's Default Date Format specified through System Options Maintenance (MENU XAFILE). (N 6,0) Required
Customer Due Date	This field represents the date all bid responses are due to the customer requesting the bid being processed. Key the appropriate customer due date. **Default Value:** Today's date. **Valid Values:** A date that falls on or after the date entered in the **Vendor Due Date** field. Key the date using the **Default Date Format** for this user, specified through Register A+ User IDs (MENU XACFIG). If that field is blank, key the date using the system's Default Date Format specified through System Options Maintenance (MENU XAFILE). (N 6,0) Required
Customer Bid No	This field represents the customer bid number they have assigned for the bid being processed. This field is an informational field only and is used to link multiple bids for inquiry purposes. Key the customer bid number assigned to the bid being processed. (A 30) Optional
Bid Renewal No	This field represents the bid number of a previous bid for which the bid being processed is to have the same bid information. This field is used to show the customer that the bid being processed is made up of the same information as a previous bid for which they have requested a new bid. Key the appropriate bid renewal number, if applicable, for the bid being processed. (A 30) Optional

Field/Function Key	Description
Create Rebate	This field represents whether or not rebates will be created when you post a bid to the Vendor Rebate File through Close Bids (MENU BQMAIN) and the report type is **U** for update. Key **Y** if you wish rebates to automatically be created. Key **N** if you wish to omit rebates from being automatically created. No rebates will be created during the post and you will have to manually key in rebates, or create contracts for pricing. (A 1) Required
Apply For Rebate	This field represents whether or not reimbursement for the rebate for the bid being processed is to be requested from the vendor, by creating A/P Vouchers or A/R Invoices. Key **Y** if the rebate has not been incorporated into the cost of the item(s) and a request is needed to the vendor for reimbursement of this rebate. Key **N** if the rebate has been incorporated into the cost of the item(s) and no request is needed for reimbursement. **Default Value:** N **Valid Values:** Must be N if the **Create Rebate** field is set to N. (A 1) Required
Rebate Date Code	This field is required if the field is set to Y. Use this field to key whether you wish to use the sales order entry date or the sales order requested ship date when entering a customer order for the approved and closed bid and then retrieving the rebate for the bid being processed. Key **E** to use the sales order entry date. Key **R** to used the sales order requested ship date. **Valid Values:** E, R (A 1) Required/Optional

Field/Function Key	Description
Start Date	This field represents the start date for which rebates for the bid being processed. Key the date you wish all rebates for the bid being processed to begin. This field is required if the **Create Rebate** field is set to Y. Additionally, this field must not be greater than the date keyed in the **End Date** field. The rebate start date must be on or after the bid opening date. **Valid Values:** Key the date using the **Default Date Format** for this user, specified through Register A+ User IDs (MENU XACFIG). If that field is blank, key the date using the system's **Default Date Format** specified through System Options Maintenance (MENU XAFILE). (N 6,0) Required/Optional
End Date	This field represents the end date for all rebates for the bid being processed. Key the date you wish all rebates for the bid being processed to end. This field is required if the **Create Rebate** field is set to Y. Additionally, this field must not be less than the date keyed in the **Start Date** field. **Valid Values:** Key the date using the **Default Date Format** for this user, specified through Register A+ User IDs (MENU XACFIG). If that field is blank, key the date using the system's **Default Date Format** specified through System Options Maintenance (MENU XAFILE). (N 6,0) Required/Optional
Cust Rebate Class	This field represents the customer rebate class for which the rebate for the bid being processed is to be applied. Key the appropriate customer rebate class. To exclude one or more of the customers from the customer rebate class for this rebate only, use the **F11=CUST EXCL** function key. **Valid Values:** A valid customer rebate class created through Customer Rebate Classes Maintenance (MENU OEREBT). (A 5) Required/Optional
F4=Vendors	Press **F4=VENDORS** to display the Vendor Listing Screen, where you can view the vendors selected to be included on this bid.
F5=Comments	Press **F5=COMMENTS** to display the Enter/Change Bid Header Comments Screen, where you may enter comments to be associated with the bid being processed.

Field/Function Key	Description
F6=Customers	Press **F6=CUSTOMERS** to display the Bid & Quote Rebate Customers List Screen, where you may add or delete customers from the rebate for the bid being processed.
F10=End Bid	Press **F10=END BID** to end the current bid. The bid information you entered will be saved and the Bid & Quote End Screen will display.
F11=Cust Excl	Press **F11=CUST EXCL** to display the Bid & Quote Customer Exclude Screen, where you may exclude certain customers from this bid.
F24=Cancel	Press **F24=CANCEL** to cancel the new bid being entered. A confirmation window will display. Key Y to confirm this cancelation. The Enter, Change, Delete Bids Selection Screen will display. The bid will be deleted entirely and no history will be available. Key N to disregard this cancelation.
F24=Delete	Press **F24=DELETE** to delete the selected bid being maintained. A confirmation window will display. Key Y to confirm this deletion. The Enter, Change, Delete Bids Selection Screen will display. The bid will be deleted entirely and no history will be available. Key N to cancel this deletion.
Enter	Press **ENTER** to confirm your selections. If there is customer search criteria in the Find, City, or St/Prov fields, the Customer Search Screen will appear. For more information on this screen, refer to the Infor Distribution A+ Accounts Receivable User Guide. Otherwise, the Add Item Screen will display, where you may add items to the bid being processed.

Vendor Listing Screen



This screen displays after pressing the **F4=VENDORS** key from the Bid & Quote Header Screen. Use this screen to display a list of vendors who have been assigned to this bid through the Add Item Screen. This screen may also be used to select a vendor to override any vendor information that has previously been entered for that vendor for this bid.

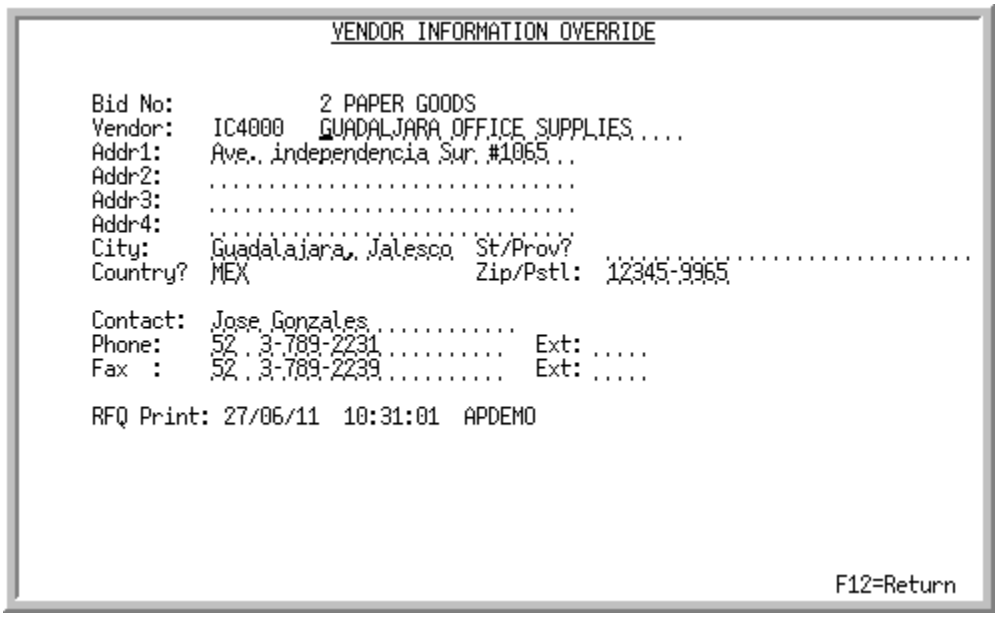
Note: Only those vendors who have already been assigned to the bid will display on this screen. If no line/sub-lines have been entered on the bid being processed, this screen will be blank.

Vendor Listing Screen Fields and Function Keys

Field/Function Key	Description
Bid No	The Bid Number field displays the bid number entered on the Enter, Change, Delete Bids Selection Screen for the selected bid followed by the Bid Description entered on the same screen. Display
Reference Number	This field displays the reference number of the vendor displayed on this screen. Use this field to determine which vendor you wish to view or change additional contact information by keying this number in the Selection field on the lower portion of this screen. Display
Vendor	This field displays the vendor number of the vendor displayed on this screen. Display

Field/Function Key	Description
Vendor Name	This field displays the vendor name of the vendor displayed on this screen. Display
Vendor Contact	This field displays the contact person assigned to the vendor displayed on this screen. Display
Phone/Fax Number	This two-way toggle column displays either the vendor phone number or the vendor fax number depending upon your selection with the **F9=PHONE / F9=FAX** key. Display
Ext	This field displays the extension number of either the phone number or the fax number for this vendor depending upon your selection with the **F9=PHONE/ F9=FAX** key. Display
RFQ	This field displays whether a request for quote for the bid being processed has been printed for this vendor. If Y displays in this field, an RFQ has been printed for this vendor for the bid being processed. If N displays in this field, an RFQ has not been printed for this vendor for the bid being processed. Refer to CHAPTER 6: Printing Vendor RFQs (MENU BQMAIN) for a further explanation of Vendor RFQs. Display
Selection	Use this field to select one of the vendors displayed on this screen for which you wish to change/display vendor contact information for this bid. Key the number in the Sel column that corresponds to the vendor you want to select, and press **ENTER**. (N 2,0) Optional
F9=Phone/Fax	Press the **F9=PHONE / F9=FAX** two-way toggle key to display either the phone number with extension or fax number with extension for each vendor in the **Phone Number / Fax Number** column.
F12=Return	Press **F12=RETURN** to return to the previous screen.
Enter	After keying a reference number in the **Selection** field, press **ENTER** to display the Vendor Information Override Screen.

Vendor Information Override Screen



This screen displays after pressing **ENTER** from the Vendor Listing Screen. Use this screen to review and/or override vendor information for the selected vendor for this bid.

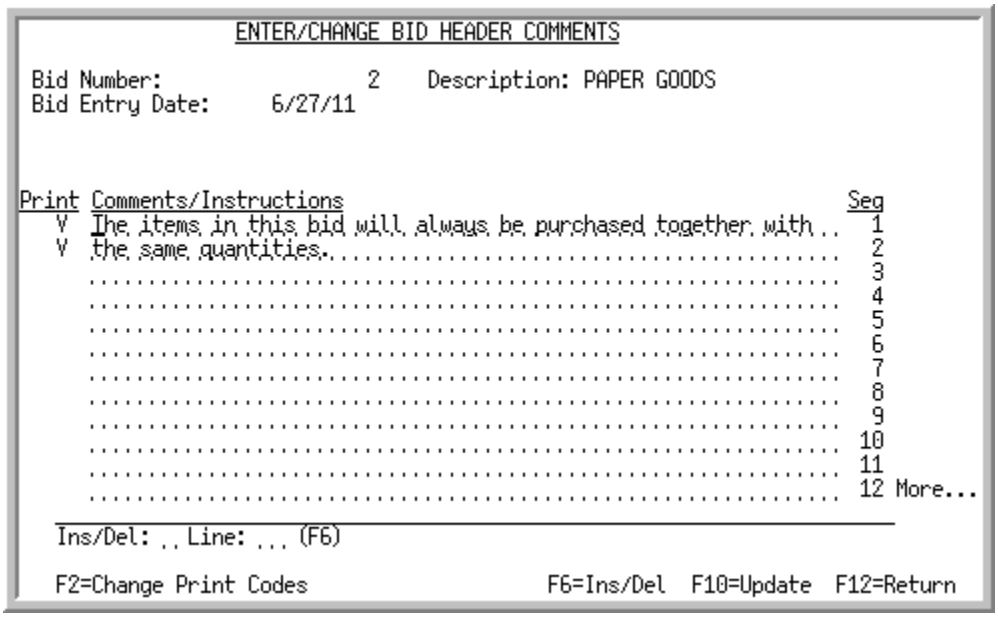
Vendor Information Override Screen Fields and Function Keys

Field/Function Key	Description
Bid No	This field displays the bid number and description of the bid being processed. Display
Vendor	This field displays the vendor number of the selected vendor. Display
Addr 1 - Addr 4	These fields display the address specified for the vendor through Vendor Master Maintenance (MENU POFILE/MENU APFILE). You can override or add to the address. You can use the **Addr 4** field only if **Form Type** is 2 in System Options Maintenance (MENU XAFILE). Key the vendor's street address, post office box number or other address information except for the city, state/province, country, and zip/postal code which are specified in fields below. (4 @ A 30) Optional

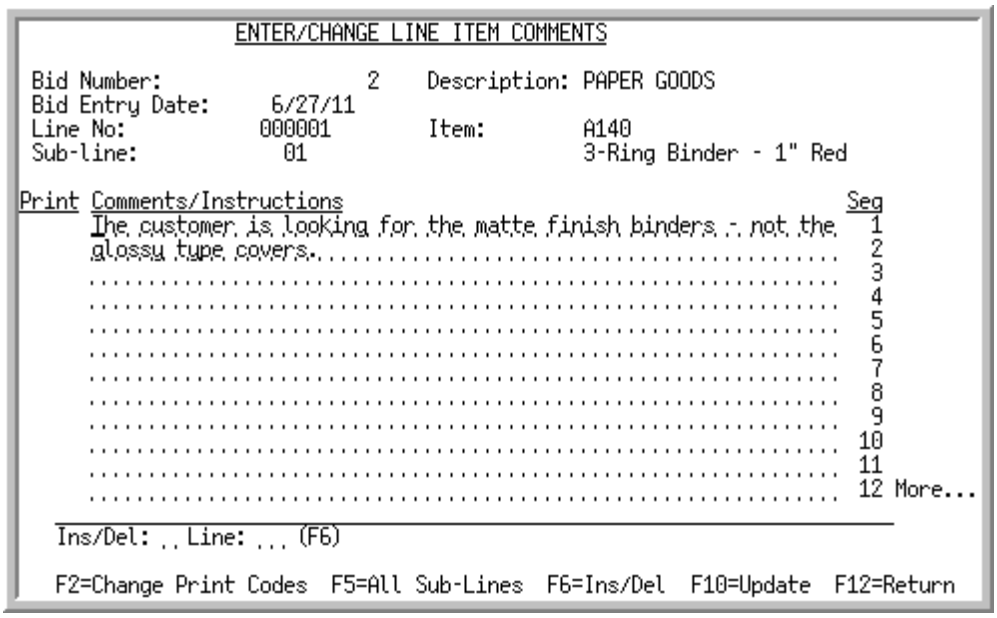
Field/Function Key	Description
City	Key the vendor's city. **Default Value:** The city specified for the vendor through Vendor Master Maintenance (MENU POFILE). (A 20) Optional
St/Prov	Key the vendor's state or province. **Default Value:** The state or province specified for the vendor through Vendor Master Maintenance (MENU POFILE). **Valid Values:** A state or province code defined through State/Province Codes Maintenance (MENU OEFIL3) if **Validate State/Province** is Y in Systems Options Maintenance (MENU XAFILE). (A 30) Optional
Country	Key the vendor's country. **Default Value:** The country code specified for the vendor through Vendor Master Maintenance (MENU POFILE). **Valid Values:** A country code defined through Country Name Maintenance (MENU ARFIL2). (A 3) Optional
Zip/Pstl	Key the vendor's zip or postal code. The zip or postal code specified for the vendor through Vendor Master Maintenance (MENU POFILE). (A 10) Optional
Contact	Use this field to change the name of contact person for this bid for the selected vendor. Key the appropriate contact person. (A 30) Optional

Field/Function Key	Description
Phone/Ext	Blank spaces are allowed between numerals only if **Allow Blank Phone Delimiters** is Y in Systems Options Maintenance (MENU XAFILE). In the **Phone** field, key the vendor's telephone number, which includes a 3- character country access code followed by the area code and telephone number. For example: 011 (781) 555-1212 For more information, refer to Phone and Fax Number Delimiters in the Introduction of the Infor Distribution A+ Cross Applications User Guide. In the **Ext** field, key the telephone extension. **Default Value:** The phone and extension number specified for the vendor through Vendor Master Maintenance (MENU POFILE). **Valid Values:** Numerals and the following symbols: - ( ) /. (N 3,0 / N 20,0 / N 4,0) Optional
Fax/Ext	Blank spaces are allowed between numerals only if **Allow Blank Phone Delimiters** is Y in Systems Options Maintenance (MENU XAFILE). In **Fax** field, key the vendor's fax number, which includes a 3-character country access code followed by the area code and telephone number. For example: 011 (781) 555-1212. For more information, refer to Phone and Fax Number Delimiters in the Introduction of the Infor Distribution A+ Cross Applications User Guide. In the **Ext** field, key the telephone extension for the fax machine. **Default Value:** The phone and extension number specified for the vendor through Vendor Master Maintenance (MENU POFILE). **Valid Values:** Numerals and the following symbols: - ( ) /. (N 3,0 / N 20,0 / N 4,0) Optional
RFQ Print	This field represents the RFQ print date, if applicable. Additionally, the time, time printed, and user name will display if the RFQ has been printed. Display
F12=Return	Press **F12=RETURN** to return to the Vendor Listing Screen without updating vendor information.
Enter	Press **ENTER** to update the selected vendor information. The Vendor Listing Screen will redisplay and the selected vendor information will be updated for this bid only.

Enter/Change Bid Header Comments Screen



Enter/Change Line Item Comments Screen



The Enter/Change Bid Header Comments Screen displays after pressing the **F5=COMMENTS** key from the Bid & Quote Header Screen. Use this screen to enter/review bid header comments for the bid being processed. You may enter up to 98 lines of free form comments.

The Enter/Change Line Item Comments Screen displays after pressing the **F5=COMMENTS** key from the Item Detail Maintenance Screen. Use this screen to enter/review line item comments for the selected item. You may enter up to 98 lines of free form comments.

Use the **F2=CHANGE PRINT CODES / F2=CHANGE CMT TEXT** toggle key to key a 1-character print code in the Print field, or comment text in the Comments/Instructions field.

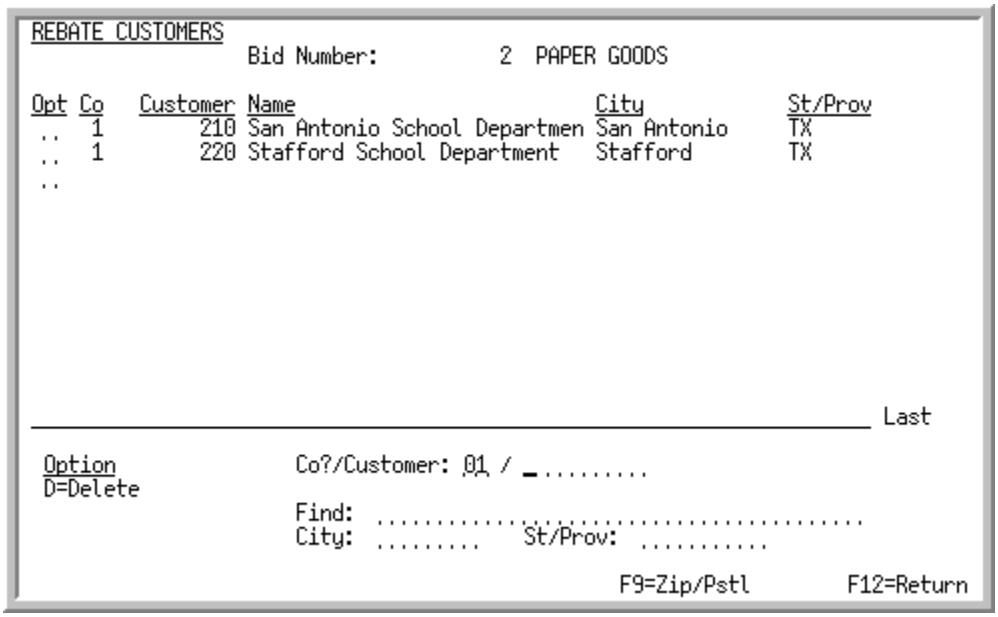
Enter/Change Bid Header Comments Screen and Enter/Change Line Item Comments Screen Fields and Function Keys

Field/Function Key	Description
Bid Number	This field displays the bid number assigned on the Enter, Change, Delete Bids Selection Screen for the selected bid. Display
Bid Description	This field displays the description entered for the selected bid. Display
Bid Entry Date	This field displays the bid entry date for the selected bid. Display
Line No	The **Line No** field only displays on the Enter/Change Line Item Comments Screen. This field displays the line number of the selected item. Display
Sub-Line	The **Sub-Line** field only displays on the Enter/Change Line Item Comments Screen. This field displays the sub-line number of the selected item. Display
Item	The **Item** field only displays on the Enter/Change Line Item Comments Screen. This field displays the item number and description of the selected item. Display

Field/Function Key	Description
Print	You may access this column with the **F2=CHANGE PRINT CODES / F2=CHANGE CMT TEXT** key. This field represents the print code, if applicable, to be assigned to each line of comment text. Key **X** if you want the associated comment text to print on the Bid/Quote Worksheet, Customer Quote, and the Vendor RFQ only. Key **C** if you want the associated comment text to print on the Customer Quote Document and Bid/Quote Worksheet only. Key **V** if you want the associated comment text to print on the Vendor RFQ Document and the Bid/Quote Worksheet only. Leave this field **blank** if you do not want the associated comment text to print on any Bid & Quote documents or reports. The comment will display in the inquiry. **Valid Values:** X, C, V, or Blank (A 1) Optional
Comments/Instructions	Use this field to enter up to 98 lines of free form comments/instructions to be associated with the selected bid or with the selected item. To change comment text, press the **F2=CHANGE CMT TEXT** key to allow comment entry and key changes or additions, where appropriate. To change print codes, press the **F2=CHANGE PRINT CODES** key to allow print code entry and key changes or additions, where appropriate. (98 @ A 62) Optional
Seq	The sequence number of the comments/instructions displayed on this screen. Use these numbers to reference a comment/instruction for change or to insert a new comment/instruction in front of. Display
Ins/Del	Use this field in conjunction with the Line field and the **F6=INS/DEL** key to either insert a new line or to delete an existing line. Key **I** to insert a line. Key **D** to delete a line. (A 1) Optional
Line	Use this field in conjunction with the **Ins/Del** field and the F6=INS/DEL key to select a line sequence number you either want to insert a line before or delete. Key the line number of the line you want to insert a new line before or you want to delete. (N 2,0) Optional

Field/Function Key	Description
F2=Change Print Codes / Change Cmt Text	The **F2=CHANGE PRINT CODES / F2=CHANGE CMT TEXT** key acts as a two-way toggle allowing you to add or change print codes displayed in the **Print** column or add or change comment text displayed in the **Comments/ Instructions** fields.
F5=All Sub-Lines/This Sub-Line	The **F5=ALL SUB-LINES / F5=THIS SUB-LINE** function key only displays on the Enter/Change Line Item Comments Screen. Use **F5=ALL SUB-LINES / F5=THIS SUB-LINE** two-way toggle key to mark the selected comments for this sub-line number or for all sub-lines associated with the selected line number.
F6=Ins/Del	Use **F6=INS/DEL** in conjunction with the Ins/Del field and the Line field in order to either insert a new line or to delete an existing line.
F10=Update	Press **F10=UPDATE** to update the bid comment data keyed on this screen and return to either the Bid & Quote Header Screen or the Item Detail Maintenance Screen.
F12=Return	Press **F12=RETURN** to return to either the Bid & Quote Header Screen or the Item Detail Maintenance Screen without saving your changes or additions.
Enter	Press **ENTER** to edit the values keyed in the **Print** column.

Bid & Quote Rebate Customers List Screen



This screen displays after pressing **F6=CUSTOMERS** on the Bid & Quote Header Screen. Use this screen to specify the rebate customers to be included with the primary customer associated with this bid. Customers listed on this screen will be eligible for rebates for any won items on the bid. These customers are a sub-group of primary customers who requested quotes for the bid being processed.

Example:

The school district of Lincoln, Rhode Island requested a quote for school supplies for the current fiscal year. The Lincoln school district is the primary customer requesting the quote. Eligible rebate customers would be all individual schools that make up the Lincoln school district. Those schools (rebate customers), such as Lincoln High School, Lincoln Junior High, Central Elementary School, etc., would be entered on this screen as eligible for the rebates for won items for the bid being processed.

If you are unsure of the customer number, use the **Find**, **City**, and **St/Prov** fields with the **ENTER** key to activate the Customer Search Feature.

Bid & Quote Rebate Customers List Screen Fields and Function Keys

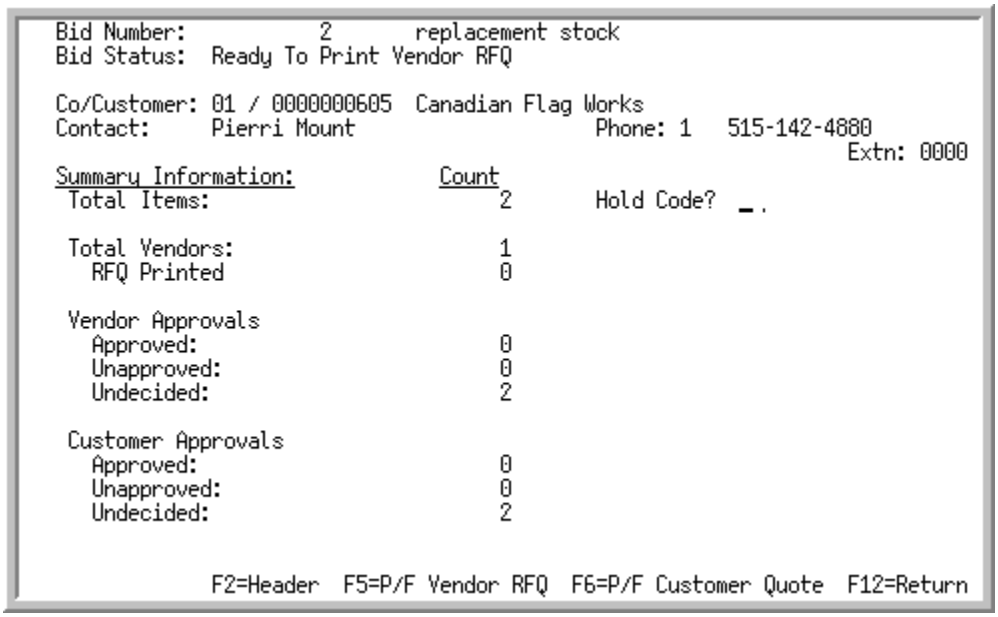
Field/Function Key	Description
Bid Number	The **Bid Number** assigned on to the selected bid with the description entered for the selected bid. Display

Field/Function Key	Description
Opt	Use this field to delete customers previously included for the bid being processed. Key **D** next to an existing customer you wish to delete, and press **ENTER** to remove it from this bid. (A 1) Optional
Co	The company of the customer displayed on this screen. Display
Customer	The customer number of the customer entered for this inclusion Display
Name	The customer name of the customer entered for this exclusion. Display
City	The city of the customer displayed on this screen. Display
St/Prov or Zip/Pstl	This column displays either the customer's state/province or zip/postal code, depending on your selection with the **F9=ZIP/PSTL / F9=ST/PROV** toggle key. Display
Co/Customer	This field appears only if the **Multi Company** field is set to Y through System Options Maintenance (MENU XAFILE). Key the company and/or customer number for the customer which is to be included on the bid being processed. Valid Values: • A company defined through Company Name Maintenance (MENU XAFILE). • A customer defined through Customer/Ship to Master Maintenance (MENU ARFILE) for the selected company. (N 2,0 / N 10,0) Optional

Field/Function Key	Description
Find	Either alone or with the City and St/Prov fields, allows you to search for a customer by name, phone number, and zip/postal code. Key one or more of the following, separated by one blank space: • up to 10 characters (the first 10) of one or more words in the customer's name. Key the words in any order. • up to 10 characters (the first 10) of the PO contact's phone number, excluding the country code and delimiters • up to 5 characters (the first 5) of the customer's zip/postal code For information about entering search criteria, refer to the Cross Applications User Guide. After keying appropriate search criteria, the *Customer Search Screen* will appear. Refer to this screen as described in the Infor Distribution A+ Accounts Receivable User Guide. (A 40) Optional
City	Either alone or with the Find and St/Prov fields, allows you to search for a customer in a particular city. Key up to 8 characters (the first 8) of the customer's city. For information about entering search criteria, refer to the Infor Distribution A+ Cross Applications User Guide. (A 8) Optional
St/Prov	Either alone or with the **Find** and **St/Prov** fields, allows you to search for a customer in a particular city. Key up to 8 characters (the first 8) of the customer's city. For information about entering search criteria, refer to the Infor Distribution A+ Cross Applications User Guide. (A 10) Optional
F9=Zip/Pstl / F9=St/Prov	Press **`F9=ZIP/PSTL / F9=ST/PROV`** to toggle between displaying the customer's state/province and zip/postal code in the last column.
F12=Return	Press **`F12=RETURN`** to return to the Bid & Quote Header Screen.

Field/Function Key	Description
Enter	**ENTER** performs several functions: • After keying **D** in the Opt column for a customer, press **ENTER** to remove the customer from the bid. • After keying a customer number in the **Customer** field, press **ENTER** to add the customer to the bid. • After keying search criteria in the **Find**, **City**, and **St/Prov** fields, press **ENTER** to view a list of customers on the Customer/Ship-To Search - Customer Search Screen. For an explanation of this screen, refer to the Infor Distribution A+ Accounts Receivable User Guide.

Bid & Quote End Screen



This screen displays after pressing **F10=END BID** on the Bid & Quote Header Screen or after pressing **F10=END** on the Add Item Screen. This screen displays a summary of the bid being processed and the current status of the bid. Additionally, this screen allows you to perform any of the following actions for this bid:

- place a bid on hold
- remove a hold code from a bid placed on hold
- print/fax/e-mail vendor RFQs
- print/fax/e-mail customer quotes

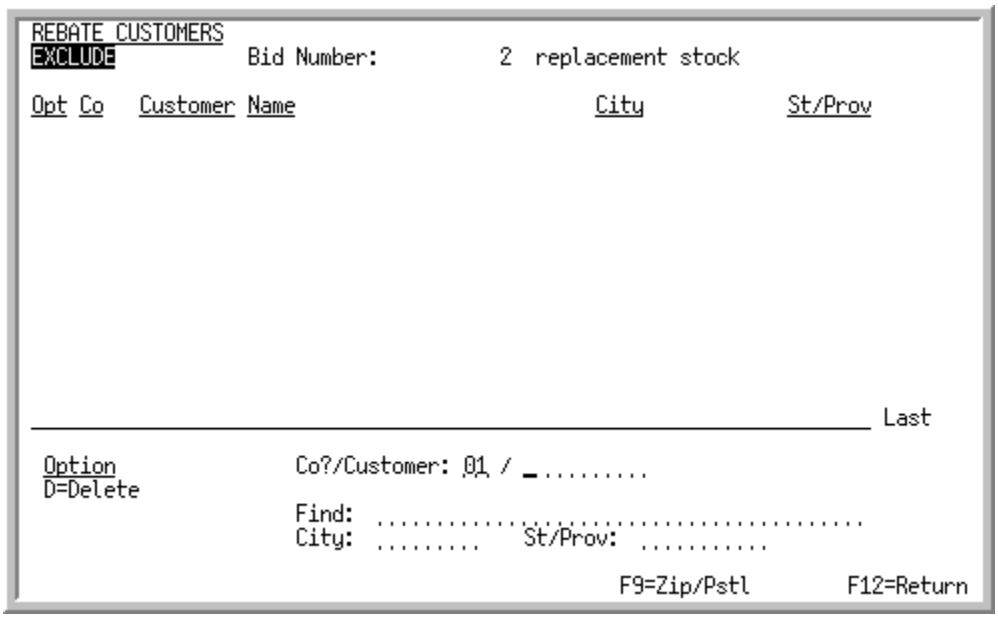
Bid & Quote End Screen Fields and Function Keys

Field/Function Key	Description
(Bid Information)	The **Bid Number** assigned on to the selected bid with the description entered for the selected bid. Display
Bid Status	This field displays the current status of the selected bid. Bid status types may be one of the following: • **RFQ Ready**: The bid has been entered, items and vendors have been assigned to the bid, and you are ready to send the request for quotes to the appropriate vendors. • **RFQ Printed**: The bid has been entered, items and vendors have been assigned to the bid, and you have printed/faxed and sent the request for quotes to the appropriate vendors. • **Quote Ready**: The appropriate vendors have received the request for quotes and have returned bids with their cost information, you have entered that vendor cost and marked all line/sub-lines as vendor approved/rejected (Y or N), and all vendor approved line/ sub-lines have had item price information entered. • **Quote Printed:** All line/sub-lines of the bid have been vendor approved/rejected, all vendor approved line/sub-lines have had item customer price information entered, and you have printed/ faxed and sent the quote to the customer. • **Approved/Rejected**: The customer has received the quote, returned it to you, and you have marked all applicable line/sub- lines as customer approved/rejected. • **Closed**: All line/sub-lines of the quote have been marked as customer approved/rejected and you have closed the bid through Close Bids (MENU BQMAIN). • **Held-XX**: The bid has been placed on hold on the Bid & Quote End Screen, XX representing the hold code used to put the bid on hold. • **WS-Bid Mnt**: The bid is currently being maintained at another workstation. • **WS-Prt RFQ**: The vendor RFQ is currently being printed at another workstation. • **WS-Prt Qte**: The customer quote is currently being printed at another workstation. • **WS-Closing**: The bid is currently being closed at another workstation. • **WS-Marked**: The bid is currently being maintained through Open/ Closed Bid Inquiry (MENU BQMAIN). Display

Field/Function Key	Description
Co/Customer	This field displays the primary company and customer number of the customer who requested quotes for the selected bid and also the customer name. Display
Contact	This field displays the contact for primary customer for the selected bid. Display
Phone	This field displays the telephone number of the primary customer for the selected bid. Display
Extn	This field displays the extension of the telephone number of the primary customer for the selected bid. Display
Total Items	This field displays the total number of items entered for the selected bid. Display
(Vendor Information)	The following vendor information for this bid displays on this screen: • **Total Vendors**: This field displays the total number of vendors associated with the selected bid. • **RFQ Printed**: This field displays the total number of RFQs (request for quotes) printed to date for the selected bid. Display
Vendor Approvals	The following vendor approval information for this bid displays on this screen: • **Approved**: This field displays the number of approved vendor line/sub- lines that currently exist for the items entered for the selected bid. • **Unapproved**: This field displays the number of rejected vendor line/sub- lines that currently exist for the items entered for the selected bid. • **Undecided**: This field displays the number of undecided vendor line/sub- lines that currently exist for the items entered for the selected bid. Display

Field/Function Key	Description
Customer Approvals	The following customer approval information for this bid displays on this screen: • **Approved**: This field displays the number of customer approved line/sub- lines that currently exist for the items entered for the selected bid. • **Unapproved**: This field displays the number of customer rejected line/ sub-lines that currently exist for the items entered for the selected bid. • **Undecided**: This field displays the number of customer undecided line/ sub-lines that currently exist for the items entered for the selected bid. Display
Hold Code	Use this field to put this bid on hold or to remove a hold code from the selected bid. Key a hold code to place this bid on hold. Blank out this field to remove this bid from a previous hold. **Valid Values:** A hold code defined through Order Hold Codes Maintenance (MENU OEFILE). (A 2) Display/Optional
F2=Header	Press **F2=HEADER** to display the Bid & Quote Header Screen.
F5=P/F Vendor RFQ	Press **F5=P/F VENDOR RFQ** to display the Print Vendor RFQ's Screen. From that screen you can print/fax vendor RFQs for the selected bid. If Mail Server is installed, the request can be e-mailed, in addition to being printed and/or faxed. Refer to CHAPTER 6: Printing Vendor RFQs (MENU BQMAIN) for a detailed explanation.
F6=P/F Customer Quote	Press **F6=P/F CUSTOMER QUOTE** to print/fax/e-mail customer quotes for the selected bid. The Print Customer Quotes Screen appears.
F12=Return	Press **F12=RETURN** to return to the Add Item Screen. If you have entered or removed a hold code from the selected bid, it will be updated.
Enter	Key a hold code in the **Hold Code** field to place this bid on hold and then press **ENTER**. The selected bid will be placed on hold and the Enter, Change, Delete Bids Selection Screen will display. Blank out the hold code from the Hold Code field if you wish to remove this bid from any previous hold and then press **ENTER**. The selected bid will be removed from any previous hold and the Enter, Change, Delete Bids Selection Screen will display. Press **ENTER** to return to the Enter, Change, Delete Bids Selection Screen.

Bid & Quote Customer Exclude Screen



This screen displays after you press **F11=CUST EXCL** on the Bid & Quote Header Screen. Use this screen to select customers to be excluded from rebates for the bid being processed. Customers entered on this screen will not be eligible for rebates for any won item(s) on the bid being processed.

Additionally, you may use this screen to delete a customer(s) previously excluded from this bid that you now wish to reinstate. To reinstate a rebate customer that is part of a customer rebate class or that has been entered through the Bid & Quote Rebate Customers List Screen, you simply delete them from this screen.

Bid & Quote Customer Exclude Screen Fields and Function Keys

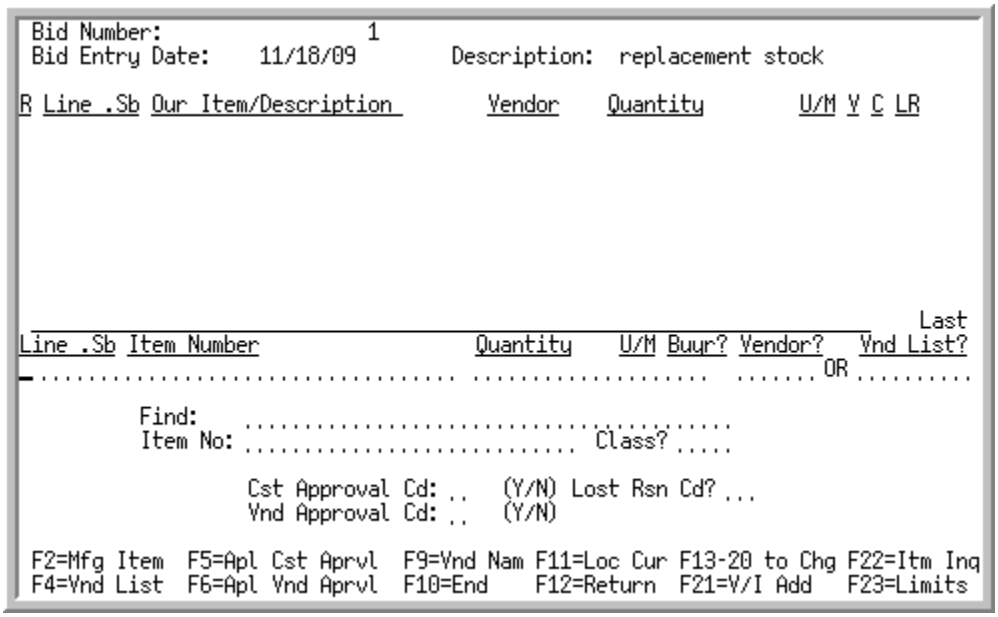
Field/Function Key	Description
(Bid Information)	The **Bid Number** assigned on to the selected bid with the description entered for the selected bid. Display
Opt	Use this field to delete a customer previously added from this customer exclusion list. Key D next to the existing customer you wish to delete, and press **Enter** to remove this customer from this exclusion list. (A 1) Optional
Co	This field displays the company of the customer displayed on this screen. Display

Field/Function Key	Description
Customer	This field displays the customer number of the customer entered for this exclusion. Display
Name	This field displays the customer's name of the customer entered for this exclusion. Display
City	This field displays the city of the customer displayed on this screen. Display
St/Prov or Zip/Pstl	This column displays either the state/province or the zip/postal code of the customer displayed on this screen, depending on your selection with the F9=ZIP/PSTL / F9=ST/PROV toggle key. Display
Co/Customer	This field appears only if the **Multi Company** field is set to Y through System Options Maintenance (MENU XAFILE). Key the company and/or customer number of the company you wish to add to the customer exclusion list for the bid being processed. **Company** **Default Value:** The default company defined in Authority Profile Maintenance (MENU XASCTY) if one has been defined; otherwise, this is the default company defined through System Options Maintenance (MENU XAFILE) **Valid Values:** A valid company number defined through Company Name Maintenance (MENU XAFILE) which you are authorized to access through Authority Profile Maintenance (MENU XASCTY). **Customer** **Valid Values:** A customer defined through Customer/Ship to Master Maintenance (MENU ARFILE). (A 2/N 10,0) Optional

Field/Function Key	Description
Find	Either alone or with the **City** and **St/Prov** fields, allows you to search for a customer by name, phone number, and zip/postal code. Key one or more of the following, separated by one blank space: • up to 10 characters (the first 10) of one or more words in the customer's name. Key the words in any order. • up to 10 characters (the first 10) of the PO contact's phone number, excluding the country code and delimiters • up to 5 characters (the first 5) of the customer's zip/postal code For information about entering search criteria, refer to the Infor Distribution A+ Cross Applications User Guide. After keying appropriate search criteria, the Customer Search Screen will appear. Refer to this screen as described in the Infor Distribution A+ Accounts Receivable User Guide. (A 40) Optional
City	Either alone or with the **Find** and **St/Prov** fields, allows you to search for a customer in a particular city. Key up to 8 characters (the first 8) of the customer's city. For information about entering search criteria, refer to the Infor Distribution A+ Cross Applications User Guide. (A 8) Optional
St/Prov	Either alone or with the Find and St/Prov fields, allows you to search for a customer in a particular city. Key up to 8 characters (the first 8) of the customer's city. For information about entering search criteria, refer to the Infor Distribution A+ Cross Applications User Guide. (A 10) Optional
F9=Zip/Pstl or St/Prov	Press **F9=ZIP/PSTL / F9=ST/PROV** to toggle between displaying the customer's state/province and zip/postal code in the last column.
F12=Return	Press **F12=RETURN** to return to the Bid & Quote Header Screen.

Field/Function Key	Description
Enter	**ENTER** performs several functions: • After keying D in the **Opt** column for a customer, press **ENTER** to remove the customer from the bid's exclusion list. • After keying a customer number in the **Customer** field, press **ENTER** to add the customer to the bid's exclusion list. • After keying search criteria in the **Find**, **City**, and **St/Prov** fields, press **ENTER** to view a list of customers on the Customer Search Screen. For an explanation of this screen, refer to the Accounts Receivable User Guide.

Add Item Screen



This screen displays after you press **ENTER** on the Bid & Quote Header Screen. Use this screen to enter those items you wish to include on the bid being processed. Both non-valid (items not currently defined in Inventory Accounting) and valid items may be entered on a bid through this screen. This allows you to bid on items you currently do not stock without having to set them up.

Items added to a bid through this screen are entered as line/sublines in order to enter similar items for different vendors. This gives you the flexibility of entering different vendor, quantity, buyer, and unit of measure information for each item entered on the bid.

Additionally, you may mark groups of items as customer approved/rejected and vendor approved/rejected in conjunction with the item limits you select through the Specify Item Detail Limits Screen. You may also tailor which items you wish to display on this screen. Refer to the Specify Item Detail Limits Screen for a detailed explanation of item limits.

Note: If you add an item on this screen and press **ENTER**, it may not display in the item list due to the item limits you set through Specify Item Detail Limits Screen. If item limits have been entered, the **F23=LIMITS** key will display in reverse image.

Add Item Screen Fields and Function Keys

Field/Function Key	Description
Bid Number	This field displays the bid number assigned on the Enter, Change, Delete Bids Selection Screen for the selected bid. Display
Bid Entry Date	This field displays the bid entry date for the selected bid. Display

Field/Function Key	Description
Bid Description	This field displays the description entered for the selected bid. Display
R	This field displays the reference number of the item displayed on this screen. Use this field to determine which item you wish to select in conjunction with the **F13-F20 TO CHG** function keys on the lower portion of this screen. You may select an item entered for this bid in order to enter, change, or delete item information and/or to individually mark line items as approved/rejected for both customer and vendor approvals. Display
Line.Sb	This field displays the line and sub-line number for this item. This is used to distinguish items with different item detail and vendors assigned to the same bid. Display
Our Item/Description/ Mfg Item/Description/ Orig Item/Description	This field toggles using the **F2=MFG ITEM / F2=CUST ITEM / F2=OUR ITEM** key between the original item number and description, our customer item number and description, and the manufacturer's item number and description for this item. Display
Vendor	This field displays the vendor selected to bid on this item. Display
Quantity/Vendor Name/Vendor Cst/Cust Unit Price	This column displays one of the following four fields entered for this item, depending on your selection of the **F9=VND NAM / F9=COST / F9=PRICE / F9=QTY** toggle key: • **Quantity** - the quantity requested for the item assigned to this line/sub- line. **F9=QTY** redisplays this field. • **Vendor Name** - the vendor assigned to this item on this line/sub-line. **F9=VND NAM** redisplays this field. • **Vendor Cst** - the vendor rebate cost entered for this item on this line/sub- line and an additional column (C), which appears to the right of this column), showing you the vendor rebate cost code for this item. **F9=COST** redisplays this field. • **Cust Unit Price** - the customer unit price entered for this item on this line/ sub-line. **F9=PRICE** redisplays this field. Display

Field/Function Key	Description
U/M	This field displays one of the following values, depending on your selection of the **F9=VND NAM / F9=COST / F9=PRICE / F9=QTY** toggle key: • **F9=VND NAM** - there is no U/M field displayed for this toggle • **F9=QTY** - ordering unit of measure when the quantity is displayed • **F9=COST** - costing unit of measure when the vendor cost is displayed • **F9=PRICE** - pricing unit of measure when the customer unit price is displayed. Display
V	This field displays whether or not this line item/vendor has been approved by you, the distributor, if this field: • displays **Y**, this line item/vendor has been approved. • displays **N**, this line item/vendor has been rejected. • is blank, this line item has not been approved/rejected. Display
C	The Customer Approval Status field displays whether or not this line item has been approved by the primary customer. If this field displays **Y**, this line item has been approved by the primary customer. If this field displays **N**, this line item has been rejected by the primary customer. If this field is blank, this line item has not been approved/rejected to date by the primary customer. Display
LR	This field displays the lost reason code, if applicable, if this line item has been rejected by the primary customer. Display

Field/Function Key	Description
Cur	This field only displays when International Currency is installed. This column only displays for two of the toggles available with the **F9=VND NAM / F9=COST / F9=PRICE / F9=QTY** toggle key. When F9=COST is pressed, and the column heading shows as Vendor Cst, this field displays the currency code that represents the trading currency of the vendor or the company's local currency depending on your selection of the **F11=LOC CUR / F11=TRD CUR** function key. When **F9=PRICE** is pressed, and the column heading shows as Cust Unit Price, this field displays the currency code that represents the trading currency of the customer or the company's local currency depending on your selection of the **F11=LOC CUR / F11=TRD CUR** function key. Display
Line.Sb	This field represents the line/sub-line number of the item being added to this bid. Each new item placed on a bid is assigned a sequential line/sub-line number. There may be up to 99 sub-lines for each line item entered. You may use the sub-lines to identify the same item for each individual vendor entered for the bid. For example, key the appropriate line/sub-line number. Distribution A+ will assign incremental line with .01 sub if you want to key all items being requested by the customer first. You may add vendor sub-lines at any time. (N 5,2) Required
Item Number	Use this field to enter the item number of the item requested by the customer for this bid. This may be a valid or non-valid item (items not currently defined in Inventory Accounting). Key the appropriate item number requested by the customer for this bid. **Note:** Non-valid items may be entered on a bid through this screen, however, if a non-valid item quote is won (from the primary customer), you must create that item as a valid item through Item Master Maintenance (MENU IAFILE) before you will be allowed to mark this item as approved (**Y** in the Customer **Approval Code** field on the Item Detail Maintenance Screen). (A 27) Required

Field/Function Key	Description
Quantity	Use this field to enter the quantity of the item you wish to add to this bid. Key the appropriate quantity of the item. (N 10,3) Optional
U/M	Use this field to enter the ordering unit of measure you wish to use for the item you wish to add to this bid. For a valid item, the unit of measure can be any of the stocking or pricing units of measure, or any of the vendor/item units of measure if a vendor item record has been setup. The default unit of measure for all valid items is the default selling unit of measure. A non-valid unit of measure may be entered for a non-valid item. **Note:** If a non-valid item unit of measure quote is won, you must create the unit of measure as a valid unit of measure through Unit of Measure Maintenance (MENU IAFIL2). Key the appropriate ordering unit of measure of the item. (A 3) Optional
Buyr	Use this field to enter the code of the buyer who primarily deals with the vendor or the line item for this bid. Key the appropriate buyer code for the item. (A 3) Optional
Vendor	Use this field to enter the code of the vendor you wish to assign to this item on this line/sub-line for this bid. Key the appropriate vendor for the item. **Valid Values:** A valid vendor defined through Vendors Maintenance (MENU POFILE/MENU APFILE). (A 6) Optional
Vnd List	Use this field to enter a vendor listing of those vendors you wish to bid on this item. Vendor Lists are created and maintained through Vendor Listing Screen. Once a list is selected, and you press **ENTER**, Distribution A+ will automatically display the lines/sub-lines for the vendors, with the same line number but with different sub-lines for each vendor being displayed. Key the vendor list you want to assign to the selected item. (A 10) Optional

Field/Function Key	Description
Find	Use this field to search for an item using one or more words that closely match the item for which you are searching. The words you key may be up to 15 characters long and may appear in any order. Key the most unique words to improve the speed of the search. Leave this field blank if you would like to search on an item class. To search for manufacturer item numbers, prefix the criteria you enter with **M/**. The system will search based on the Vendor/Item File (**VNITM**) valid manufacturer item number. To search for customer item numbers, prefix the criteria you enter with **C/**. The system will search based on the Item/Customer Cross Reference File (IAXRF) valid customer item numbers. To search for UPC cross references, prefix the criteria you enter with **U/**. The system will search based on the Universal Product Code File (**ITUPC**) for valid UPC cross references. To search for GTIN cross references, prefix the criteria you enter with **G/**. The system will search based on the Global Trade Item Number File (**ITGTIN**) for valid GTIN cross references. (A 40) Optional
Item No	This field may be used in addition to, or in place of, entering search criteria in the Find field to further limit the items to display. Key a partial item number. All items that match the characters of the item number keyed in this field will display. This is helpful if you recall part of an item number, but not the entire number. For information on entering search criteria, refer to the Cross Applications User Guide. (A 27) Optional
Class	This field may be used in addition to (not in place of) the search criteria in the **Find** or **Item No** fields to further limit the number of items that will display, based on their item class. Key the appropriate item class and sub-class, if any. Only items that have been assigned the item class that is keyed in this field will display on the Item Description Search Screen. For information on entering search criteria, refer to the Cross Applications User Guide. (A 2/A 2) Optional

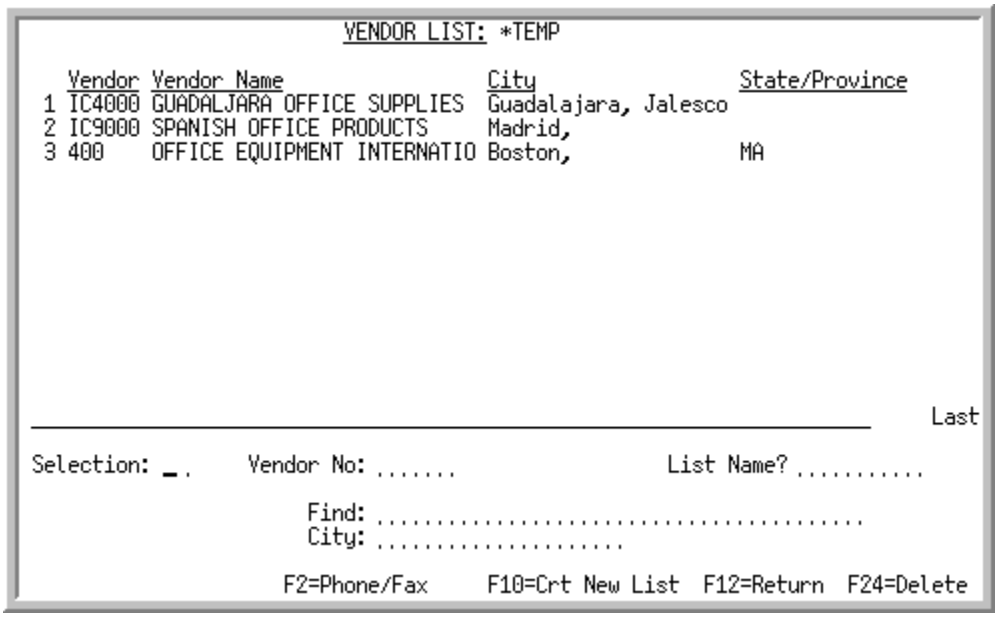
Field/Function Key	Description
Cst Approval Cd	Use this field in conjunction with the **F5=APL CST APRVL** key to automatically update the customer approval code for all items that display on this screen. You may tailor which line/sub-lines you wish to display on this screen by setting item limits through the Specify Item Detail Limits Screen. All items that fall within the applicable criteria limits will be updated with the customer approval code you enter in this field. Refer to the Specify Item Detail Limits Screen for a detailed explanation on item limits. Key **Y** to mark the items displayed on this screen as customer approved. Key **N** to mark the items displayed on this screen as customer rejected. Valid Values: • Must be blank if you do not use the **F5=APL CST APRVL** key. • Must be **Y** or **N** if you use the **F5=APL CST APRVL** key. (A 1) Required/Blank
Lost Rsn Cd	Use this field to enter a lost reason code for those customer rejected line items associated with this bid. **Note:** When using the ? feature in this field, the **Update Demand** field is ignored for Bid & Quote lost reason codes. Valid Values: • Must be blank if you do not use the **F5=APL CST APRVL** key. • Must be blank if you use the **F5=APL CST APRVL** key and the **Customer Approval** Code is set to **Y**. • Must be a valid lost reason code, entered through Order Delete Reason Codes (MENU OEFILE), if you use the **F5=APL CST APRVL** key and the **Cst Approval Cd** field is set to **N**. (A 2) Required/Blank

Field/Function Key	Description
Vnd Approval Cd	Use this field in conjunction with the **F6=APL VND APRVL** key to automatically update all items that display on this screen. You may tailor which line/sub- lines you wish to display by setting item limits through the Specify Item Detail Limits Screen. All items that fall within the applicable criteria limitations will be updated with the vendor approval code you enter in this field. Refer to the Specify Item Detail Limits Screen for a detailed explanation on item limits. Key **Y** to mark the items displayed on this screen as vendor approved. Key **N** to mark the items displayed on this screen as vendor rejected. Valid Values: • Must be blank if you do not use the **F6=APL VND APRVL** key. • Must be **Y** or **N** if you use the **F6=APL VND APRVL** key. (A 1) Required/Blank
F2=Mfg Item/Cust Item/Our Item	Press **F2=MFG ITEM / F2=CUST ITEM / F2=OUR ITEM** to toggle the item description column between original item number and description, your customer item number and description, and the manufacturer's item number and description for this item.
F4=Vnd List	Press **F4=VND LIST** to display the Vendor List Screen, where you may create a list of vendors you want to include on the bid being processed.
F5=Apl Cst Aprvl	Key the appropriate value in the **Cst Approval Cd** field and/or the Lost Rsn Cd field and press **F5=APL CST APRVL** to automatically update all line/sub-lines displayed on this screen with the customer approval code and lost reason code you enter.
F6=Apl Vnd Aprvl	Key the appropriate value in the **Vnd Approval Cd** field and press **F6=APL VND APRVL** to automatically update all line/sub-lines displayed on this screen with the vendor approval code you enter.
F9=Vnd Nam/Cost/ Price/Qty	Press **F9=VND NAM / F9=COST / F9=PRICE / F9=QTY** to toggle the **Quantity** / **Vendor Name** / **Vendor Cost** / **Cust Unit Price column** and related fields to display one of the following values: • **F9=QTY** - quantity and ordering unit of measure requested for the item on this line/sub-line • **F9=VND NAM** - vendor assigned to this item on this line/sub-line • **F9=COST** - vendor cost/cost code/costing unit of measure entered for this item on this line/sub-line • **F9=PRICE** - customer unit price and pricing unit of measure entered for this item on this line/sub-line

Field/Function Key	Description
F10=End	Press **F10=END** to end this bid. The Bid & Quote End Screen will display.
F11=Loc Cur/Trd Cur	Press **F11=LOC CUR / F11=TRD CUR** to toggle the Cur column between the customer or vendor trading currency and the company's local currency.
F12=Return	Press **F12=RETURN** to return to the Bid & Quote End Screen.
F13-F20=To Chg	Press the key that corresponds to the reference number (Reference Number field) of an item that you wish to maintain or enter/change item cost, price, and approval information on the Item Detail Maintenance Screen. Use the function keys as follows to select an item to change: • F13=REFERENCE NUMBER 1 • F14=REFERENCE NUMBER 2 • F15=REFERENCE NUMBER 3 • F16=REFERENCE NUMBER 4 • F17=REFERENCE NUMBER 5 • F18=REFERENCE NUMBER 6 • F19=REFERENCE NUMBER 7 • F20=REFERENCE NUMBER 8 If the function keys on your keyboard are arranged in a single row, then press the shift key and the corresponding reference number. **Example:** To change line 8, press SHIFT and F8. -OR- If the function keys on your keyboard are arranged in a two rows, press the key which is directly above the reference number key in the bottom row. **Example:** To change line 8, find function key 8 in the bottom row. Press **F20** in the top row because it is directly above **F8**. The Item Detail Maintenance Screen will display for the selected item.
F21=V/I Add	Key a valid item number and quantity and press **F21=V/I ADD** to add all vendors that supply this item to the bid. Only those vendors set up with vendor/item records through Vendor/Item Information Maintenance (MENU POFILE) will be added. The Item Detail Maintenance Screen will display for the first vendor for the selected item.
F22=Itm Inq	Press **F22=ITM INQ** to access the Item Inquiry. Refer to the Inventory Accounting User Guide (MENU IAMAIN) for a detailed explanation of this option.

Field/Function Key	Description
F23=Limits	Press **F23=LIMITS** to display the Specify Item Detail Maintenance Screen, where you may set item detail limitations for the line/sub-lines you wish to display on this screen.
Enter	Press **ENTER** to confirm your selection. The Item Detail Maintenance Screen will display, where you may enter/change information for the selected item.

Vendor List Screen



This screen displays after selecting the **F4=VND LIST** key on the Add Item Screen. Use this screen to create a vendor list for the vendors you wish to include on the bid being processed. This list may be created as a temporary list (*TEMP), specifically for the bid being processed, or as a permanent list, by giving it a list name through the use of the List Name field.

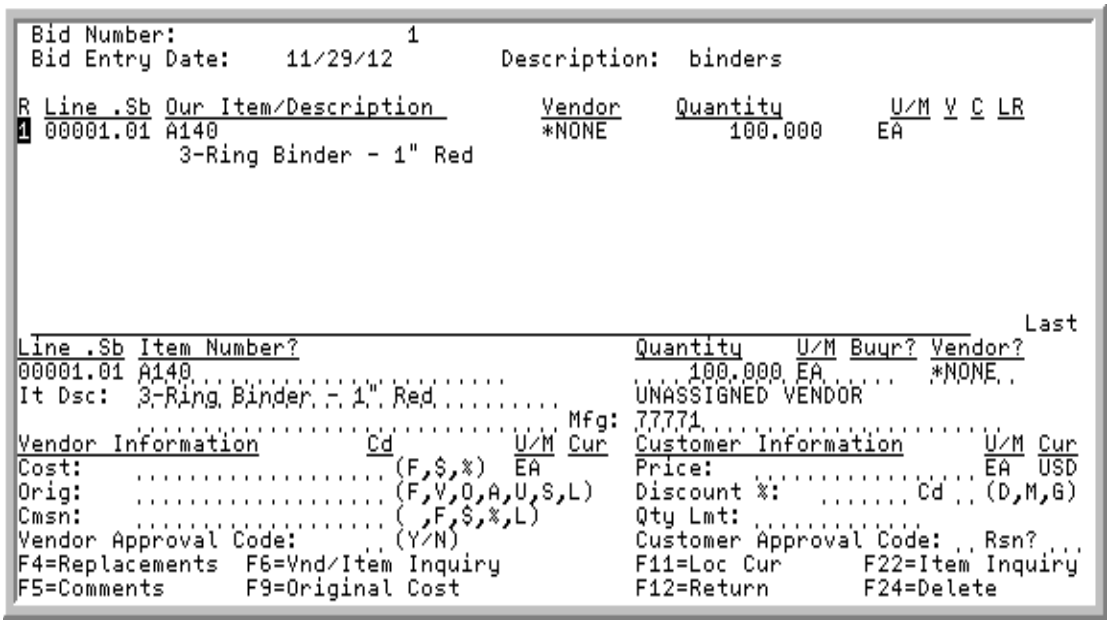
Vendor List Screen Fields and Function Keys

Field/Function Key	Description
Reference Number	This field displays the reference number of the vendor displayed on this screen. Use this field to determine which vendor you wish to delete from the selected vendor list by keying this number in the Selection field on the lower portion of this screen and pressing the **F24=DELETE** key. Display
Vendor	This field displays the vendor number of the vendor entered on this screen. Display
Vendor Name	This field displays the name of the vendor entered on this screen. Display

Field/Function Key	Description
City or Phone	This column displays either the **City** field or the **Phone** number field of the vendor entered on this screen, depending on your selection with the F2=PHONE/FAX / F2=CITY/ST/PROV toggle key. Display
State/Province or Fax	This column displays the **State/Province** field or the Fax number field of the vendor entered on this screen, depending on your selection with the **F2=PHONE/FAX / F2=CITY/ST/PROV** toggle key. Display
Selection	Use this field to select one of the vendors displayed on this screen for which you wish to delete from the selected vendor list. Key the number beneath the Reference column that corresponds to the vendor you wish to select to delete. (N 2,0) Optional
Vendor No	Use this field to enter the vendor number of a vendor you wish to add to the selected vendor list. Key the vendor number of the vendor you wish to add to this vendor list. If you do not know the vendor number, use the **Find** and **City** fields to activate the Vendor Search feature. (A 6) Optional
List Name	Use this field to select an existing vendor list you wish to use for this bid. After selecting the vendor list you want, you may optionally add vendors to this list by entering their vendor number in the Vendor No field. Key the vendor list name of the vendor list you wish to use. (A 10) Optional
Find	Use this field to activate the Vendor Search feature when you do not know the vendor's number. Key the vendor's name or up to 10 characters (the first 10) of one or more words in the vendor's name and press ENTER to display the Vendor Search Screen. To limit the vendor search by city (i.e., search for the specified vendor name within a particular city), key a city in the **City** field as well. For more information on using searches and for a description of the search screens, refer to the Infor Distribution A+ Cross Applications User Guide. (A 40) Optional

Field/Function Key	Description
City	When using the Find field to search for a vendor, you can limit the search to a particular city by keying a partial or complete city name in this field. If you enter characters in this field, the Vendor Search Screen displays only vendors that meet the criteria specified here and in the Find field. For more information on using searches and for a description of the search screens, refer to the Infor Distribution A+ Cross Applications User Guide. (A 8) Optional
F2=Phone/Fax or City/ St/Prov	Press **F2=PHONE/FAX / F2=CITY/ST/PROV** to toggle between the city/state/ province and the phone/fax number. Press **F2=PHONE/FAX** to display the phone and fax numbers. Press **F2=CITY/ST/PROV** to display the city and state/province.
F10=Crt New List	After selecting the vendors you want to add to a vendor list and entering a vendor list name in the **List Name** field, press **F10=CRT NEW LIST** to add a new vendor list. When you exit this screen, the name of the vendor list you created will be automatically entered in the Vnd List field on the Add Item Screen and will be used to determine which vendors are to be included for the bid being processed.
F12=Return	Press **F12=RETURN** to return to the previous screen. The name of the vendor list you created or selected will be automatically entered in the Vnd List field on the Add Item Screen and will be used to determine which vendors are to be included for the bid being processed.
F24=Delete	Enter the reference number in the Selection field of the vendor you want to delete from the selected vendor list and press **F24=DELETE**. A pop-up window will display, where you will be required to confirm this deletion. Key **Y** to confirm this deletion. Key **N** and press **ENTER** to cancel this deletion.
Enter	After keying a vendor number in the **Vendor No** field, press **ENTER** to add the selected vendor to this vendor list.

Item Detail Maintenance Screen



This screen displays after entering an item and pressing **ENTER** or by selecting an item using its corresponding function key (**F13-F20**) on the Add Item Screen. Use this screen to perform maintenance and/or enter cost information for the selected item on the bid being processed. You also may delete an existing item that is designated as part of the selected bid. Additionally, if you prefer to use customer and vendor contracts instead of rebates, you may do so through Contract Prices (MENU OEPRCE) and Vendor Contracts Maintenance (MENU POFIL2), respectively.

Rebate cost and price information entered for each item on this bid consists of the following:

- The actual amount of the rebate which is either a fixed value or an amount (either a monetary amount or a percentage amount) subtracted from the original cost of the item.
- The original cost of the item, needed to calculate the rebate. This cost is either a fixed value; the vendor/item cost, the original cost, the average cost, the user cost, the standard cost, or the last cost of the item.
- The commission cost you wish to assign, which, when used, is updated in order history.
- The price of the item.

Refer to the following example to review how these values affect the actual rebate provided to your customer:

Example:

Assumption A: Vendor 100 provides a $0.20 rebate off the established vendor/item cost of $4.50 for item A100.

Costing Process:

1 Key .20 as the rebate Cost, and $ in the rebate cost code (Cd) field to indicate that $.20 will be reduced from the original cost of the item.

2 Leave the Orig Cost field blank and key V in the original cost code (Cd) field to indicate that the rebate is to be taken off the vendor/item cost of the item.

Assumption B: If commissions will be calculated based on $.10 of the vendor's $.20 rebate, this would be set up as follows (note that this assumes the Commission Cost Flag in Order Entry Options Maintenance (MENU XAFILE) is set to V for Vendor/Item):

Costing Process:

1 Key .10 as the Cmsn Cost, and $ in the commission cost code (Cd) field to indicate that $.10 will be reduced from the original commission cost of the item to determine the commission cost.

Assumption C: If the final unit price of the item is $6.00 and you wish to pass the $.20 discount on to your customers, you can alter the base price of the item by doing the following:

Costing Process:

1 Key 5.80 in the overrides Price field.

When this item is ordered, these combined rebate specifications will result in the following:

a The Base Price and Final Price of the item will be $5.80.

b The Unit Cost of the item will be $4.30 (Assumption A).

c The cost used to calculate commissions (tracked in the order history detail file) will be $4.40 (Assumption B). (Note that this assumes the Commission Cost Flag in Order Entry Options Maintenance (MENU XAFILE) is set to V for Vendor/Item).

Item Detail Maintenance Screen Fields and Function Keys

Field/Function Key	Description
Line.Sb	This field represents the line/sub-line number of the item being added to this bid. Each new item placed on a bid is assigned a sequential line/sub-line number. There may be up to 99 sub-lines for each line item entered. You may use the sub-lines to identify the same item for each individual vendor entered for the bid. Display
Item Number	Use this field to enter the item number of the item requested by the customer for this bid. This may be a valid or non-valid item (items not currently defined in Distribution A+). Key the appropriate item number requested by the customer for this bid. **Note:** Non-valid items may be entered on a bid through this screen, however, if a non-valid item quote is won (from the primary customer), you must create that item as a valid item through Item Master Maintenance (MENU IAFILE) before you will be allowed to mark this item as approved (Y in the Customer **Approval Code** field on the Item Detail Maintenance Screen). Default Value: The Item Number keyed on the Add Item Screen. (A 27) Required
Quantity	Use this field to enter the quantity of the item you wish to add to this bid. Key the appropriate quantity of the item. **Default Value:** The Quantity keyed on the Add Item Screen. (N 10,3) Optional
U/M	Use this field to enter the ordering unit of measure you wish to use for the item you wish to add to this bid. For a valid item, the unit of measure can be any of the stocking or pricing units of measure, or any of the vendor/item units of measure if a vendor item record has been setup. The default unit of measure for all valid items is the default selling unit of measure. A non-valid unit of measure may be entered for a non-valid item. **Note:** If a non-valid item unit of measure quote is won, you must create the unit of measure as a valid unit of measure through Unit of Measure Maintenance (MENU IAFIL2). Key the appropriate ordering unit of measure of the item. **Default Value:** The **Unit of Measure** keyed on the Add Item Screen. (A 3) Optional

Field/Function Key	Description
Buyr	Use this field to enter the code of the buyer who primarily deals with the vendor or the line item for this bid. Key the appropriate buyer code for the item. **Default Value:** The **Buyr** keyed on the Add Item Screen. (A 3) Optional
Vendor	This field displays the vendor name of the vendor assigned to this line item for the selected bid, if one was assigned to this item on the Add Item Screen. The vendor name will display on the line below. Key the vendor from which a quote will be requested. **Default Value:** The **Vendor** keyed on the Add Item Screen. (A 6) Optional
It Dsc	Use this field to review and/or change the item description for the selected item. If you change the item description it will be updated for this line item only for this bid. Key the appropriate description for the selected item. If you change the item number to another valid item number, you must clear the item description field to have it reset to the description for the newly selected item. **Note:** If you keyed a non-valid item number, you must key at least one line of item description information that will print on the Vendor RFQ and Customer Quote. **Default Value:** The **Item Description** defaulted from the Item Master File (**ITMST**) for valid items. (A 62) Optional
Mfg	Use this field to review and/or change the manufacturer's item number for the selected item. If you change the manufacturer's item number it will be updated for this line item only for this bid. Key the appropriate manufacturer's item number for the selected item. **Default Value:** If the Vendor field is a valid vendor and there is a matching Vendor/Item Master File (**VNITM**) record, the manufacturer's item number defaults from there. When there is no matching Vendor/Item Master File (**VNITM**) record or if the **Vendor** field is ***NONE**, the manufacturer's item number is defaulted from the Item Master File (ITMST) for valid items. (A 27) Optional

Field/Function Key	Description
Cost/Cd	Use both fields to identify the rebate cost and the rebate cost code for the selected item in this rebate. The rebate cost is the unit cost of the item used in order entry when the item is subject to this rebate in the costing unit of measure. The rebate cost code identifies if this rebate cost amount is a fixed amount, a dollar amount off the original cost, or a percentage off the original cost. The **Cost field** and **Cd** field work in conjunction with one another. The following relationships are possible between both fields: • If you key **F** (fixed) in the Cd (rebate cost code) field, then the amount you key in the related rebate Cost field will be the actual rebate cost. • If you key **$** (currency amount) in the Cd (rebate cost code) field, then the amount you key in the related rebate Cost field will be a dollar amount off the original cost. If you leave this field blank, 0 is assumed, resulting in a rebate cost of 0 dollars off the original. • If you key **%** (percent) in the rebate Cd (rebate cost code) field, then the amount you key in the related rebate Cost field will be a percentage amount off the original cost. If you leave this field blank, **0** is assumed, resulting in a rebate cost of 0 percent off the original. (N 11,5/A 1) Required
U/M	This field displays the cost unit of measure from the vendor/item when valid record is selected. For items that are not assigned to a vendor or for non- stock items that are not defined, the ordering unit of measure is assumed but can be changed. (A 3) Required
Cur	This field only displays when International Currency is installed. This field displays the either the company's local currency or trading currency of the vendor, depending on your selection of the **F11=LOC CUR / F11=TRD CUR** key. Display

Field/Function Key	Description
Orig/Cd	Use both fields to identify the original cost and the original cost code for the selected item in this rebate. The original cost is the cost used to determine the rebate cost if the original cost is not a fixed amount. You specify which cost of the item will be used as the item's original cost, or a fixed original dollar amount. Key an **F** in the **Cd** (original cost code) field if the original cost for this item is a fixed cost. You must also key the related fixed cost in the Orig field. If you specify an original cost code other than F (fixed), do not key a dollar amount in the Orig field. You must key one of the following in the Cd field instead: Key **V** to use the vendor/item cost as defined for this vendor and item through Vendor/Item Information Maintenance (MENU POFILE). Key **O** to use the original cost from the order. Key **A** to use the average cost as defined for the item and warehouse through Item Balance Maintenance (MENU IAFILE). Key **U** to use the user cost defined for the item and warehouse. Key **S** to use the standard cost defined for the item and warehouse. Key **L** to use the last cost defined for the item and warehouse. Use the **F9=ORIGINAL COST** to display the Original Cost Screen and review the **Average, User, Standard**, Last costs for this item. Selecting a cost on this pop-up window will populate that cost code into the **CD** field. (N 11,5/A 1) Required

Field/Function Key	Description
Cmsn/Cd	Use both fields to identify the commission cost and the commission cost code for the selected item in this rebate. The commission cost is the cost that is used for the purpose of tracking sales representatives' commissions. It will be retained for an item in order history. If you specify an original cost code other than F (fixed), the value and code that you specify relate to the normal **commission cost specified** with the Commission Cost Flag set in Order Entry Options Maintenance (MENU XAFILE). The **Cmsn** field and Cd field work in conjunction with one another. The following relationships are possible between both fields: • If you key an **F** (fixed) in the Cd (commission cost code) field, then the amount that you key in the related commission **Cmsn** field will be the actual commission cost. • If you key a **$** (currency amount) in the Cd (commission cost code) field, then the amount you key in the related commission Cmsn field will be a dollar amount off the normal commission cost (normal commission cost is specified in Order Entry Options Maintenance (MENU XAFILE)). • If you key a **%** (percent) in the commission Cd (commission cost code) field, then the amount that you key in the related commission Cmsn field will be a percentage amount off the normal commission cost. • If you key an **L** (load factor) in the commission Cd (commission cost code) field, then you need to leave the amount blank in the related commission Cost field. Load Factors will either be applied to the Rebate Cost (if Use Rebate Cost **as Base Comm Cost** in Rebate Options Maintenance is Y), or to the normal commission cost which is specified in the **Commission Cost Flag** field in Order Entry Options Maintenance (MENU XAFILE). (N 11,5/A 1) Required

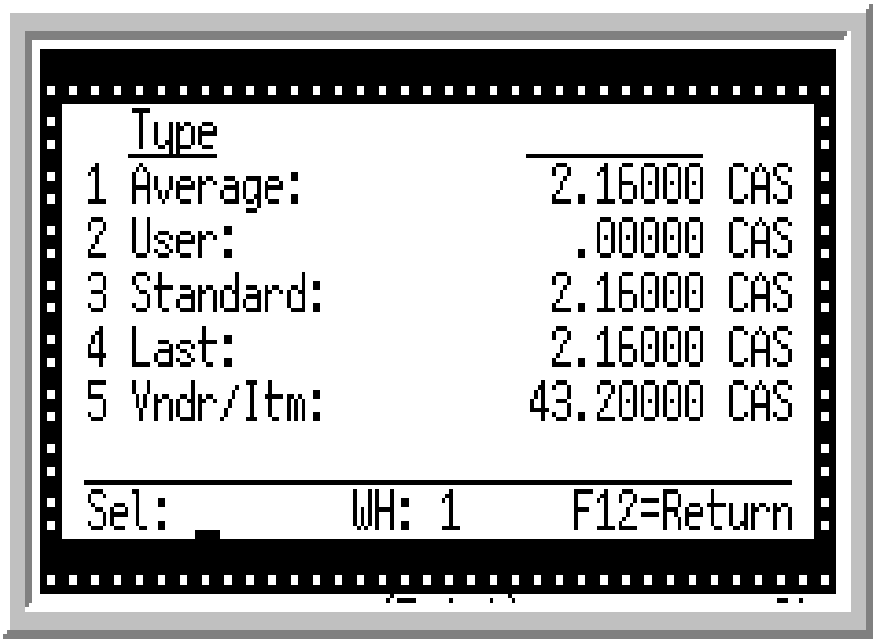
Field/Function Key	Description
Vendor Approval Code	Use this field to mark this item as approving or rejecting the bid from the vendor. Key **Y** to mark this item as vendor approved. It will indicated that you, the distributor, accept the vendor's bid for the item. **Note:** Vendor information for the selected item must be entered in order to key **Y** in this field. Key **N** to mark this item as vendor rejected. It will indicated that you, the distributor, reject the vendors bid for the item. Leave this field blank if the Vendor RFQ for this item is still pending. **Valid Values:** blank, Y or N (A 1) Optional/Required
Price	Use this field to specify an optional override of the final price of the item when this vendor rebate is in effect. The amount that you key in this field is in the pricing unit of measure and will override any other pricing that has been set up for the customer/item, including any defined through contract pricing or defined for quantity discounts. Leave this field blank if you do not wish to apply override pricing in order entry for this item. Customer/Item pricing will apply as it would without a vendor rebate. (N 11,5) Optional
U/M	This field displays the pricing unit of measure of the item. For non-stock type items that are not defined, the ordering unit of measure is assumed and cannot be changed. Display
Cur	This field only displays when International Currency is installed. This field displays the either the company's local currency or trading currency of the customer, depending on your selection of the **F11=LOC CUR / F11=TRD CUR** key. Display

Field/Function Key	Description
Discount % / Cd	Use both fields to specify an optional overriding percent discount, markup, or gross margin for this item when this vendor rebate is in effect. This override takes precedence over any other pricing that has been set up for the customer/item, including any defined through contract pricing or defined for quantity discounts. The percentage that you key in the Discount % field will be reduced from the base price or added to the rebate cost to determine the new final unit price depending on your selection in the Cd field. Key one of the following in the Cd field: • Key **D** (discount) to deduct the amount of the percentage keyed in the Discount % field from the base price of the item to calculate the item's final price. • Key **M** (markup) to use the amount of the percentage keyed in the Discount % field to calculate the markups to be added to the rebate cost of the item to calculate the item's final price. • Key **G** (gross margin) to use the amount of the percentage keyed in the Discount % field to calculate the gross margin to be added to the rebate cost of the item to calculate the item's final price. (N 5,2 / A 1) Optional
Qty Lmt	Use this field to limit the quantity of items that can be purchased at this price for which a rebate may be used for this item on this bid after this quantity of the item is ordered within the Start Date and End Date range specified on the Rebate Maintenance Screen in Rebate Master Maintenance (MENU OEREBT), the vendor rebate will no longer be applied to the item's price to the customer. (N 11,3) Optional
Customer Approval Code	Use this field to mark this item as customer approved, rejected, or pending. Key Y to mark this item as customer approved. **Note:** Price information for the selected item must be entered in order to key **Y** in this field. Key **N** to mark this item as customer rejected. Leave this field blank if the bid for this item is still pending. **Valid Values:** blank, Y or N (A1) Optional

Field/Function Key	Description
Rsn	Use this field to enter a lost reason code for this item, if the item has been rejected on this bid by the customer. Key the appropriate lost reason code for this item. **Valid Values:** A lost reason code entered through Order Delete Reason Codes (MENU OEFILE), if the **Customer Approval Code** field is set to **N**. (A 2) Required/Optional
F4=Replacements	Press **F4=REPLACEMENTS** to display the Bid & Quote Replacements Selection Screen, used during Item Replacements/Complements Maintenance (MENU OEFILE), where you may select a replacement, alternate, or upgrade item for the selected item. Refer to the Infor Distribution A+ Order Entry User Guide for a detailed explanation of this screen. **Note:** **F4=REPLACEMENTS** displays only if the selected item has replacement/alternate item(s) defined through Item Replacements/Complements Maintenance (MENU OEFILE).
F5=Comments	Press **F5=COMMENTS** to display the Enter/Change Line Item Comments Screen, where you may maintain item comments for the selected item.
F6=Vnd/Item Inquiry	Press **F6=VND/ITEM INQUIRY** to access the Vendor/Item Inquiry, where you may inquire on vendor/item information for the selected item/vendor if the selected item is a valid item. Refer to the Infor Distribution A+ Purchasing User Guide (MENU POMAIN) for a detailed explanation of this screen.
F9=Original Cost	Press **F9=ORIGINAL COST** to display a Original Cost Screen, which lists the available original costs for the item.
F11=Loc Cur / F11=Trd Cur	Press **F11=LOC CUR / F11=TRD CUR** to toggle the Cur columns between the trading currency of the vendor or the customer and the company's local currency.
F12=Return	Press **F12=RETURN** to return to the Add Item Screen without updating this screen.
F22=Itm Inq	Press **F22=ITM INQ** to access the Item Inquiry, where you may inquire on item information if the selected item is a valid item. Refer to the Inventory Accounting User Guide (MENU IAMAIN) for a detailed explanation of this option.

Field/Function Key	Description
F24=Delete	Press **F24=DELETE** to delete the selected item from this bid. A pop-up window will display, where you will be required to confirm this deletion. Key Y to confirm this deletion. The Add Item Screen will display and the item will be deleted from the bid being processed. Key N and press **ENTER** to cancel this deletion. You will be returned to the Item Detail Maintenance Screen and the selected item will not be deleted from the bid being processed.
Enter	Press **ENTER** to confirm your selections. A confirmation window appears. You will be required to press **ENTER** again to confirm your selections. The selected item will be updated and the Add Item Screen will display. **Note:** If you are in change mode (accessed this option via the **F13-F20 TO CHG** function keys on the Add Item Screen), and you press **ENTER**, the next sequential line/sub-line in the item list will display.

Original Cost Screen



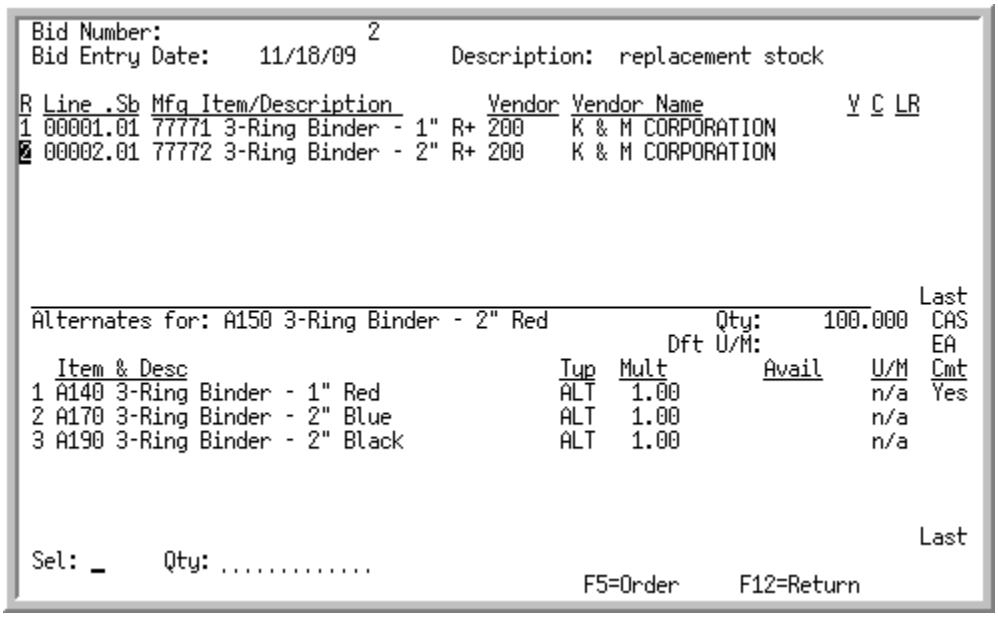
This screen appears after pressing the **F9=ORIGINAL COST** key on the Item Detail Maintenance Screen. Use this window to select the Average, User, Standard, or Last cost of the item.

Original Cost Screen Fields and Function Keys

Field/Function Key	Description
Type	The following four costs display for the item: Average, User, Standard, Last. For information on how these costs are defined and maintained, refer to the Item Balance Maintenance option (MENU IAFILE) in the Infor Distribution A+ Inventory Accounting User Guide. The fifth cost is the vendor/item cost for the item, to the Vendor/Item Maintenance option (MENU POFILE) in the Infor Distribution A+ Purchasing User Guide for more information. Display

Field/Function Key	Description
Sel	Use this field to select the cost you want to use for the item for this bid. The code of the cost you select will appear in the Orig/Cd field on the Item Detail Maintenance Screen. • Key **1** to select the item's Average cost. • Key **2** to select the item's User cost. • Key **3** to select the item's Standard cost. • Key **4** to select the item's Last cost. (N 1,0) Optional
WH	This field displays the warehouse where this item is stocked and where the costs are tracked based on the default warehouse for the user as defined through Item Balance Maintenance (MENU IAFILE). Display
F12=Return	Press **F12=RETURN** to return to the Item Detail Maintenance Screen without selecting an original cost code.

Bid & Quote Replacements Selection Screen



This screen displays after pressing the **F4=REPLACEMENTS** on the Item Detail Maintenance Screen if the selected item is a valid item and has replacement item(s) defined through Item Replacements/ Complements Maintenance (MENU OEFILE). Use this screen to select replacement items for the selected item. Item replacements available with Bid & Quote may be one of the following three types: alternate, replacement, or upgrade items.

The replacements selected on this screen is for the item keyed on the Add Item Screen that have been assigned alternate items through Item Replacements/Complements Maintenance (MENU OEFILE).

Note: Many roll screens that show the item number and description will display the item description on a separate line or the item and description on the same line, depending on the system options. This display of single or double line per item can be changed by pressing **F24=DOUBLE LINE / F24=SINGLE LINE**. **F24=DOUBLE LINE** will expand a collapsed screen or F24=SINGLE LINE will collapse an expanded screen.

Note:

- This is a roll screen. More... appears at the bottom of a roll screen to indicate that more data is available for viewing. Last appears at the bottom of the last screen of data. To scroll through information on roll screens press:
- ***PAGE DOWN** or **SHIFT-ROLL FWD** or **F7=PAGE DOWN** to display the next screen
- ***PAGE UP** or **SHIFT-ROLL BACK** or **F8=PAGE UP** to display the previous screen.

Bid & Quote Replacements Selection Screen Fields and Function Keys

Field/Function Key	Description
Bid Number	This field displays the bid number assigned on the Enter, Change, Delete Bids Selection Screen for the selected bid. Display
Bid Entry Date	This field displays the bid entry date for the selected bid. Display
Bid Description	This field displays the description entered for the selected bid. Display
R	This field displays the reference number of the item displayed on this screen. Use this field to determine which item you wish to select in conjunction with the **F13-F20 TO CHG** function keys on the lower portion of this screen. You may select an item entered for this bid in order to enter, change, or delete item information and/or to individually mark line items as approved/rejected for both customer and vendor approvals. Display
Line.Sb	This field displays the line and sub-line number for this item. This is used to distinguish items with different item detail and vendors assigned to the same bid. Display
Our Item/Description/ Mfg Item/Description/ Orig Item/Description	This field displays based on the toggles using the **F2=MFG ITEM / F2=CUST ITEM / F2=OUR ITEM** key between the original item number and description, our customer item number and description, and the manufacturer's item number and description for this item on the Item Detail Maintenance Screen before the **F4=REPLACEMENTS** function key was pressed. Display
Vendor	This field displays the vendor selected to bid on this item. Display

Field/Function Key	Description
Quantity Vendor Name/ Vendor Cst/ Cust Unit Price	This column displays based on the toggles using the **F9=VND NAM / F9=COST / F9=PRICE / F9=QTY** toggle key on the Add Item Screen. • **Quantity** - the quantity requested for the item assigned to this line/sub- line. **F9=QTY** redisplays this field. • **Vendor Name** - the vendor assigned to this item on this line/sub-line. **F9=VND NAM** redisplays this field. • **Vendor Cst** - the vendor rebate cost entered for this item on this line/sub- line and an additional column (C), which appears to the right of this column), showing you the vendor rebate cost code for this item. **F9=COST** redisplays this field. • **Cust Unit Price** - the customer unit price entered for this item on this line/ sub-line. **F9=PRICE** redisplays this field. Display
U/M	This field displays one of the following values, depending on your selection of the **F9=VND NAM / F9=COST / F9=PRICE / F9=QTY** toggle key on the Add Item Screen: • **F9=VND NAM** - there is no U/M field displayed for this toggle • **F9=QTY** - ordering unit of measure when the quantity is displayed • **F9=COST** - costing unit of measure when the vendor cost is displayed • **F9=PRICE** - pricing unit of measure when the customer unit price is displayed. Display
V	This field displays whether or not this line item/vendor has been approved by you, the distributor, if this field: • displays **Y**, this line item/vendor has been approved. • displays **N**, this line item/vendor has been rejected. • is blank, this line item has not been approved/rejected. Display

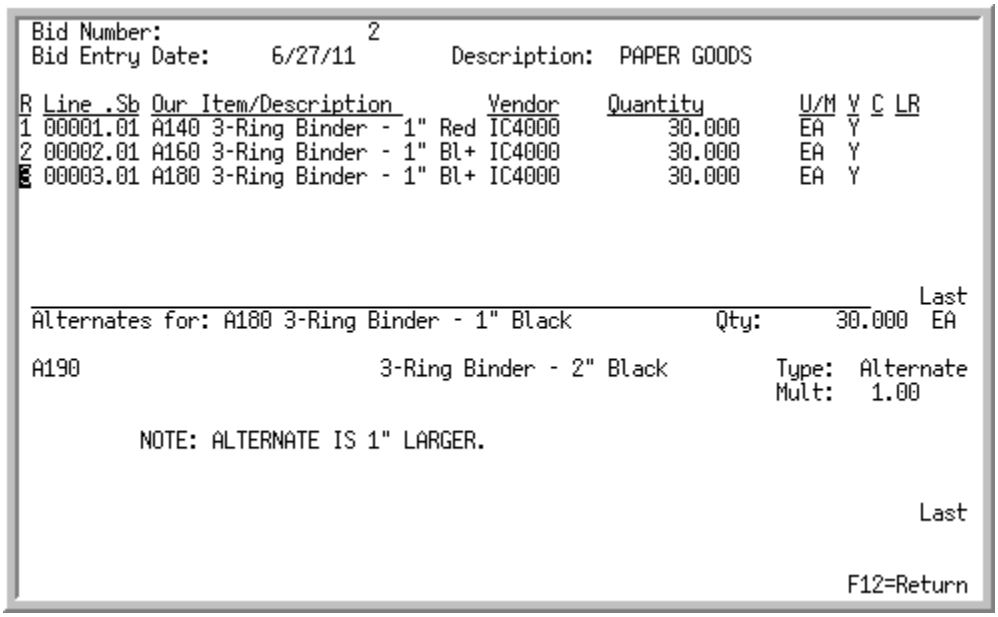
Field/Function Key	Description
C	This field displays whether or not this line item has been approved by the primary customer. If this field displays **Y**, this line item has been approved by the primary customer. If this field displays **N**, this line item has been rejected by the primary customer. If this field is blank, this line item has not been approved/rejected to date by the primary customer. Display
LR	This field displays the lost reason code, if applicable, if this line item has been rejected by the primary customer. Display
Cur	This field only displays when International Currency is installed. This column only displays for two of the toggles of the one of the **F9=VND NAM / F9=COST / F9=PRICE / F9=QTY** toggle key: When **F9=COST** is pressed, and the column heading shows as Vendor Cst, this field displays the currency code that represents the trading currency of the vendor or the company's local currency depending on your selection of the **F11=LOC CUR / F11=TRD CUR** function key. When **F9=PRICE** is pressed, and the column heading shows as Cust Unit Price, this field displays the currency code that represents the trading currency of the customer or the company's local currency depending on your selection of the **F11=LOC CUR / F11=TRD CUR** function key. Display
Qty	This field displays the order quantity and unit of measure of the original item. Display
Dft U/M	This field appears only if the Qty field does not reflect the default unit of measure defined for the item. This field displays the default unit of measure defined for the item through Item Master Maintenance (MENU IAFILE) in order to show the relationship of the multiple to the unit of measure of the original item. Display

Field/Function Key	Description
Reference Number	This field represents the reference number of the replacement, alternate, or upgrade item(s) displayed on this screen. To select one of the items displayed, you must key this number in the Sel field on the lower portion of this screen. Display
Item & Desc	This field represents the item number and description of the item or items that have been established as replacement, alternate, or upgrade items for the item displayed on the Item Detail Maintenance Screen. Items are displayed in the sequence specified when creating replacement items on the Replacements File Maintenance Screen, used during Item Replacements/Complements Maintenance (MENU OEFILE). Refer to the Infor Distribution A+ Order Entry User Guide for a detailed explanation of this screen. Display
Typ	This field represents the type of item used as a replacement for the selected item. One of the following three types are available: • **RPL**: Replacement. Replacement items may be ordered in place of the item originally requested by the customer. Replacement items are also used in the Inventory Management & Planning (IM&P) module to update sales demand for new items. this functionality is different than the O/E - B/Q functionality of replacement type items. Both the original and the replacing item number must have been created through Item Master Maintenance (MENU IAFILE). • **ALT**: Alternate. Alternate items also may be ordered in place of the item originally requested by the customer. Unlike replacement items, however, the original item number does not have to be an item defined through Item Master Maintenance (MENU IAFILE). • **UPG**: Upgrade. Upgrade items are used in the same manner as with alternate items; the original item number does not have to be an item defined through Item Master Maintenance (MENU IAFILE). You may choose to categorize an item as an upgrade, indicating that they are a better quality or provide features not available with the original item. Display

Field/Function Key	Description
Mult	This field represents the multiplier assigned to this replacement, alternate, or upgrade item. For alternate or upgrade items, the multiplier is used to calculate the quantity of alternate or upgrade items to order if you leave the Qty field on this screen blank. The quantity that will display on the Item Detail Maintenance Screen is calculated by multiplying the quantity of the original item ordered by this multiplier. For replacement items, the multiplier performs the same function if Inventory Management & Planning (IM&P) is not installed. If IM&P is installed, however, the multiplier for replacement items is used to adjust sales demand of the replacing item by the number specified by the multiplier. Refer to the Inventory Management & Planning manual for additional information. Display
Avail	This field represents the quantity of replacement items available. **Note:** This field reflects any inventory reservation quantities that have been adjusted to the available quantity. If customer inventory reservations exist for a customer other than the ordering customer, the reservation quantity has been subtracted. If the customer inventory reservation exists for the ordering customer, the quantity has been added. Display
U/M	This field represents the unit of measure that corresponds with the quantity of items available. Display
Cmt	This field represents whether or not comments exist for this replacement. **Yes** will display if a comment has been created for this replacement; otherwise, this field is blank. A comment may be displayed by keying the Reference Number of this replacement in the Sel field and pressing **ENTER**. Display
Sel	Key the Reference Number of the replacement to select for the original item keyed on the Add Item Screen. After selecting the replacement item in this field, you may press **ENTER** to display any comments for the item, or press the **F5=ORDER** key to create an item entry for the replacement item. (N 1,0) Required

Field/Function Key	Description
Qty	This field represents the quantity of the replacement item ordered. If the quantity of the replacement to order is different than the quantity specified for the original item, you may key the new quantity in this field before pressing the **F5=ORDER** key to add the item to the bid in place of the original item. (N 10,3) Optional
F5=Order	Press **F5=ORDER** to add the alternate, replacement, or upgrade item to the bid in place of the original item. If you keyed a quantity in the Qty field, that quantity will display on the Item Detail Maintenance Screen, which will display after you press the **F5=ORDER** function key.
F12=Return	Press **F12=RETURN** to return to the Item Detail Maintenance Screen, without selecting a replacement item.
Enter	Press **ENTER** after selecting a replacement item in the Sel field. Detail information about the replacement item will display on the Bid & Quote Replacements Comments Screen. Bid & Quote Replacements Comments Screen

Bid & Quote Replacements Comments Screen



This screen displays when you key a Reference Number in the Sel field on the Bid & Quote Replacements Selection Screen and press **ENTER** for an item that displays **Yes** in the Cmt field. Use this screen to review the detail information includes the replacement item number, full description, replacement type, multiplier, and comments entered for the replacement.

Note:

- This is a roll screen. More... appears at the bottom of a roll screen to indicate that more data is available for viewing. Last appears at the bottom of the last screen of data. To scroll through information on roll screens press:
- *__PAGE DOWN__ or __SHIFT-ROLL FWD__ or __F7=PAGE DOWN__ to display the next screen
- *__PAGE UP__ or __SHIFT-ROLL BACK__ or __F8=PAGE UP__ to display the previous screen.

Bid & Quote Replacements Comments Screen Fields and Function Keys

Field/Function Key	Description
Bid Number	This field displays the bid number assigned on the Enter, Change, Delete Bids Selection Screen for the selected bid. Display
Bid Entry Date	This field displays the bid entry date for the selected bid. Display

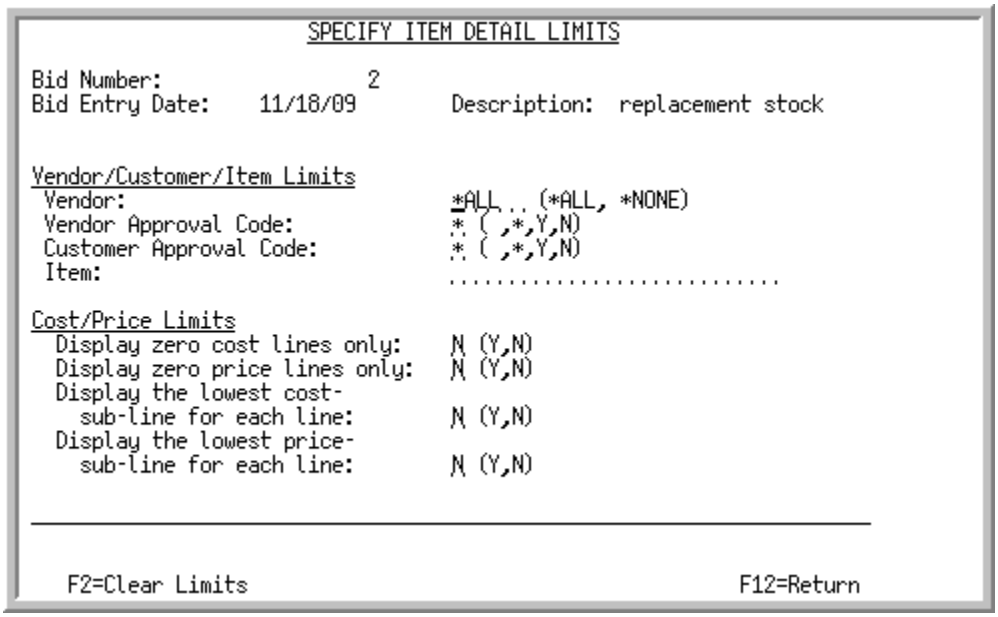
Field/Function Key	Description
Bid Description	This field displays the description entered for the selected bid. Display
R	This field displays the reference number of the item displayed on this screen. Use this field to determine which item has been selected for which to review comments. Display
Line.Sb	This field displays the line and sub-line number for this item. This is used to distinguish items with different item detail and vendors assigned to the same bid. Display
Our Item/Description/ Mfg Item/Description/ Orig Item/Description	This field displays based on the toggles using the **F2=MFG ITEM / F2=CUST ITEM / F2=OUR ITEM** key between the original item number and description, our customer item number and description, and the manufacturer's item number and description for this item on the Item Detail Maintenance Screen before the **F4=REPLACEMENTS** function key was pressed. Display
Vendor	This field displays the vendor selected to bid on this item. Display
Quantity/ Vendor Name/ Vendor Cst/ Cust Unit Price	This column displays based on the toggles using the **F9=VND NAM / F9=COST / F9=PRICE / F9=QTY** toggle key on the Item Detail Maintenance Screen before the **F4=REPLACEMENTS** function key was pressed. • **Quantity** - the quantity requested for the item assigned to this line/sub- line. **F9=QTY** redisplays this field. • **Vendor Name** - the vendor assigned to this item on this line/sub-line. **F9=VND NAM** redisplays this field. • **Vendor Cst** - the vendor rebate cost entered for this item on this line/sub- line and an additional column (C), which appears to the right of this column), showing you the vendor rebate cost code for this item. **F9=COST** redisplays this field. • **Cust Unit Price** - the customer unit price entered for this item on this line/ sub-line. **F9=PRICE** redisplays this field. Display

Field/Function Key	Description
U/M	This field displays one of the following values, depending on your selection of the **F9=VND NAM / F9=COST / F9=PRICE / F9=QTY** toggle key on the Add Item Screen: • **F9=VND NAM** - there is no U/M field displayed for this toggle • **F9=QTY** - ordering unit of measure when the quantity is displayed • **F9=COST** - costing unit of measure when the vendor cost is displayed • **F9=PRICE** - pricing unit of measure when the customer unit price is displayed. Display
V	This field displays whether or not this line item/vendor has been approved by you, the distributor, if this field: • displays **Y**, this line item/vendor has been approved. • displays **N**, this line item/vendor has been rejected. • is blank, this line item has not been approved/rejected. Display
C	This field displays whether or not this line item has been approved by the primary customer. If this field displays **Y**, this line item has been approved by the primary customer. If this field displays **N**, this line item has been rejected by the primary customer. If this field is blank, this line item has not been approved/rejected to date by the primary customer. Display
LR	This field displays the lost reason code, if applicable, if this line item has been rejected by the primary customer. Display

Field/Function Key	Description
Cur	This field only displays when International Currency is installed. This column only displays for two of the toggles of the one of the **F9=VND NAM / F9=COST / F9=PRICE / F9=QTY** toggle key: When **F9=COST** is pressed, and the column heading shows as Vendor Cst, this field displays the currency code that represents the trading currency of the vendor or the company's local currency depending on your selection of the **F11=LOC CUR / F11=TRD CUR** function key. When **F9=PRICE** is pressed, and the column heading shows as Cust Unit Price, this field displays the currency code that represents the trading currency of the customer or the company's local currency depending on your selection of the **F11=LOC CUR / F11=TRD CUR** function key. Display
Qty	This field displays the order quantity and unit of measure of the original item. Display
Item & Desc	This field represents the item number and description of the selected item for which to view additional comment information. The Reference Number of the selected line is displayed in reverse image. Display

Field/Function Key	Description
Typ	This field represents the type of item used as a replacement for the selected item. One of the following three types are available: • **Replace**: Replacement items may be ordered in place of the item originally requested by the customer. Replacement items are also used in the Inventory Management & Planning (IM&P) module to update sales demand for new items. Do not confuse the IM&P function with the O/E - B/Q function of replacement type items. Both the original and the replacing item number must have been created through Item Master Maintenance (MENU IAFILE). • **Alternate**: Alternate items also may be ordered in place of the item originally requested by the customer. Unlike replacement items, however, the original item number does not have to be an item defined through Item Master Maintenance (MENU IAFILE). • **Upgrade**: Upgrade items are used in the same manner as with alternate items; the original item number does not have to be an item defined through Item Master Maintenance (MENU IAFILE). You may choose to categorize an item as an upgrade, indicating that they are a better quality or provide features not available with the original item. Display
Mult	This field represents the multiplier assigned to this replacement, alternate, or upgrade item. and is used to calculate the quantity of alternate, upgrade, or replacement items to order. Display
(Comment)	This field displays the lines of comments that exist for this replacement. The comment text is a roll screen Display
F12=Return	Press **F12=RETURN** to return to the Bid & Quote Replacements Selection Screen.

Specify Item Detail Limits Screen



This screen displays after pressing **F23=LIMITS** on the Add Item Screen. Use this screen to limit the items that display on the Add Item Screen and/or the Item Detail Maintenance Screen. By entering specific criteria limits, you can tailor which items on this bid you wish to display or work with at any given time.

Example:

If you set the Display zero cost lines only field on this screen to Y, then only line/sub-lines without cost information will display on the Item Detail Maintenance Screen. If you enter an item number in the Item field, then only line/sub-lines with that item number will display on the Item Detail Maintenance Screen.

Additionally, you may use this screen to set item detail limits in order to display or to mark large groups of line/sub-lines as customer approved/rejected and/or vendor approved/rejected on the Item Detail Maintenance Screen.

Specify Item Detail Limits Screen Fields and Function Keys

Field/Function Key	Description
Bid Number	This field displays the bid number assigned on the Enter, Change, Delete Bids Selection Screen for the selected bid. Display
Bid Entry Date	This field displays the bid entry date for the selected bid. Display

Field/Function Key	Description
Description	This field displays the description entered for the selected bid. Display
Vendor	Use this field to limit the line/sub-lines that display on the Add Item Screen and/or the Item Detail Maintenance Screen with the vendor limits you set in this field. Key ***ALL** to display all vendors for this bid. Key * **NONE** to display only line/sub-lines without a vendor assigned to them. Key a vendor number to display only lines/sublines with this vendor assigned to them. **Default Value:** *ALL **Valid Values:** *NONE or *ALL, or Vendor Number (A 6) Required
Vendor Approval Code	Use this field to display line/sub-lines on the Add Item Screen and/or the Item Detail Maintenance Screen with the vendor approval code limits you set in this field. Key **Y** to display line/sub-lines with a Vendor Approval Code of **Y**. Key **N** to display line/sub-lines with a Vendor Approval Code of **N**. Key * to display all line/sub-lines. Leave this field blank to display line/sub-lines without a Vendor Approval Code. **Default Value:** * (A 1) Optional
Customer Approval Code	Use this field to display line/sub-lines on the Add Item Screen and/or the Item Detail Maintenance Screen with the customer approval code limits you set in this field. Key **Y** to display line/sub-lines with a Customer Approval Code of **Y**. Key **N** to display line/sub-lines with a Customer Approval Code of **N**. Key * to display all line/sub-lines. Leave this field blank to display line/sub-lines without a Customer Approval Code. **Default Value:** * (A 1) Optional
Item	Use this field to limit the line/sub-lines that display on the Add Item Screen and/or the Item Detail Maintenance Screen with the item you set in this field. Key the specific item you wish to display. (A 27) Required/Optional

Field/Function Key	Description
Display zero cost lines only	Use this field to limit the line/sub-lines that display on the Add Item Screen and/or the Item Detail Maintenance Screen with the cost information limits you set in this field. Key **Y** to display line/sub-lines without cost information. Key **N** to display line/sub-lines with cost information. **Default Value:** N (A 1) Required
Display zero price lines only	Use this field to limit the line/sub-lines that display on the Add Item Screen and/or the Item Detail Maintenance Screen with the price information limits you set in this field. Key **Y** to display line/sub-lines without price information. Key **N** to display line/sub-lines with price information. **Default Value:** N (A 1) Required
Display the lowest cost - sub-line for each line	Use this field to limit the sub-lines that display on the Add Item Screen and/or the Item Detail Maintenance Screen with those sub-lines with the lowest unit cost. This should be used when sub-lines for a particular line use the same or similar costing unit of measure. For example, Item A100 with a unit cost of $1.00 per EA is entered for line 0001.01. Item A110 with a unit cost of $1.10 per EA is entered for line 0001.02. If you set this field to Y to display the lowest cost, then line 0001.01 will display. Key **Y** to display sub-lines with the lowest unit cost. The Display the lowest cost - sub-line for each line and Display the lowest price - sub-line for each line filters cannot both be Y. Key **N** to display all sub-lines. **Note:** A unit of measure for one item does not ensure that the unit of measure defined for a different item will be the same. If this is the case, the lowest cost feature will not reflect the different quantity definitions for the units of measure for different items. **Default Value:** N (A 1) Required

Field/Function Key	Description
Display the lowest price - sub-line for each line	Use this field to limit the sub-lines that display on the Add Item Screen and/or the Item Detail Maintenance Screen with the lowest price of all sub-lines of a line. Key **Y** to display the lowest price of all sub-lines of a line. The Display the lowest cost - sub-line for each line and Display the lowest price - sub-line for each line filters cannot both be Y. Key **N** to display all sub-lines. (A 1) Required
F2=Clear Limits	Press **F2=CLEAR LIMITS** to clear all previously set limits. This screen will redisplay and all limits will default to their system values.
F12=Return	Press **F12=RETURN** to return to the Add Item Screen without updating this screen.
Enter	Press **ENTER** to confirm your selections. Your changes will be updated and the Add Item Screen will display according to the filters you entered on this screen.

Chapter 3 Closing Bids

You can close a bid for which all line/sub-lines of the bid have been marked with a customer approval code of **Y** or **N** through Close Bids (MENU BQMAIN). Once a bid is closed, the Vendor Rebate File is updated Bid & Quote Header Screen for any customer approved (won) items [if the Create Rebate field is set to **Y** on the Bid & Quote Header Screen, and the selected bid status changes to “Closed.” When this process is complete, you may then follow the normal order entry procedure for entering an order for the won items on this bid with the applicable rebates updated and applied to the items on that order.

Before any bid may be closed, the following steps must be completed:

1 The bid has been entered.

2 Items have been assigned to the bid.

3 RFQs have been printed/faxed and sent to the appropriate vendors.

4 The appropriate vendors have received the request for quotes and have returned bids with their cost information.

5 You have marked all line/sub-lines as vendor approved/rejected.

6 All vendor approved line/sub-lines have had item vendor cost and customer price information entered.

7 All customer quotes have been printed/faxed and sent to the customer.

8 The customer has received the quote, returned it to you, and you have marked all applicable line/ sub-lines as customer approved/rejected.

Additionally, you may use this option to print the Close Bids Report, which prints approved, rejected, or undecided line/sub-lines by vendor for the bid you enter.

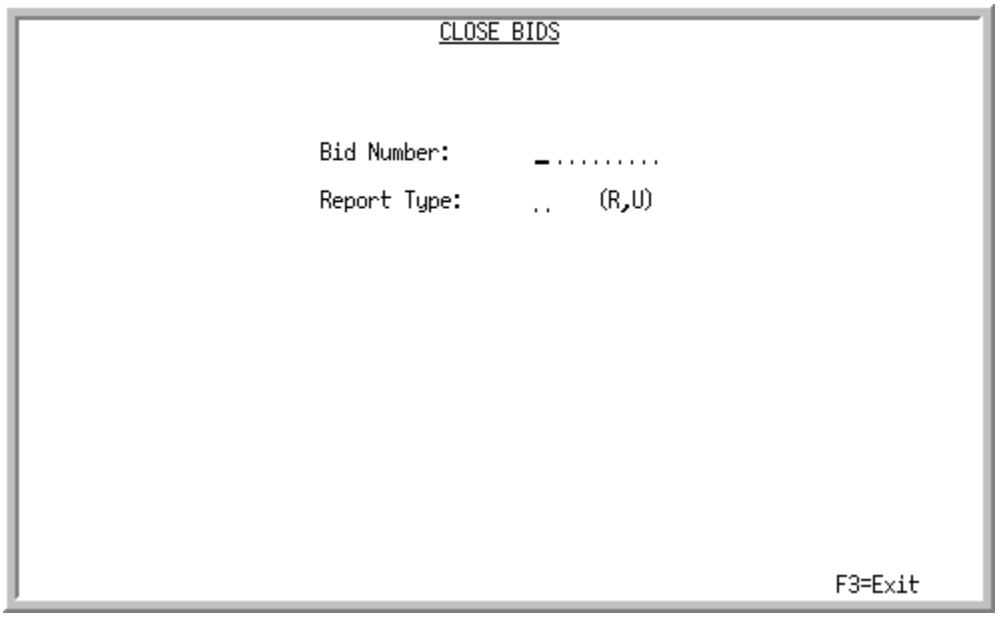
Close Bids

The screens and/or reports in Close Bids and a brief description of their purpose are listed in the following table. A complete description of each is provided in this section.

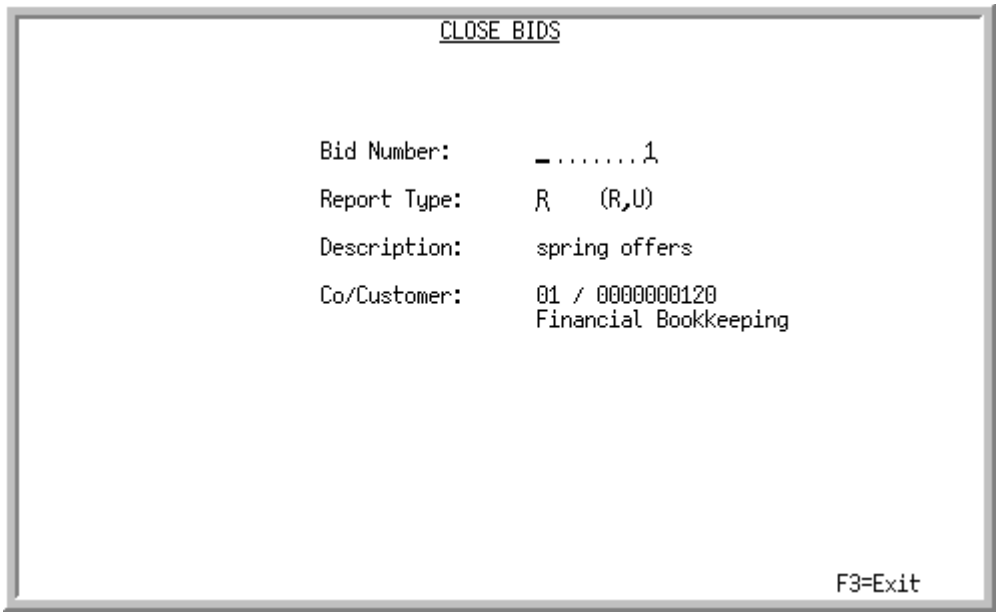
Title	Purpose
Close Bids Screen	Used to close a bid.

Title	Purpose
Close Bids Report	Used to print a report.

Close Bids Screen



Close Bids Confirmation Screen



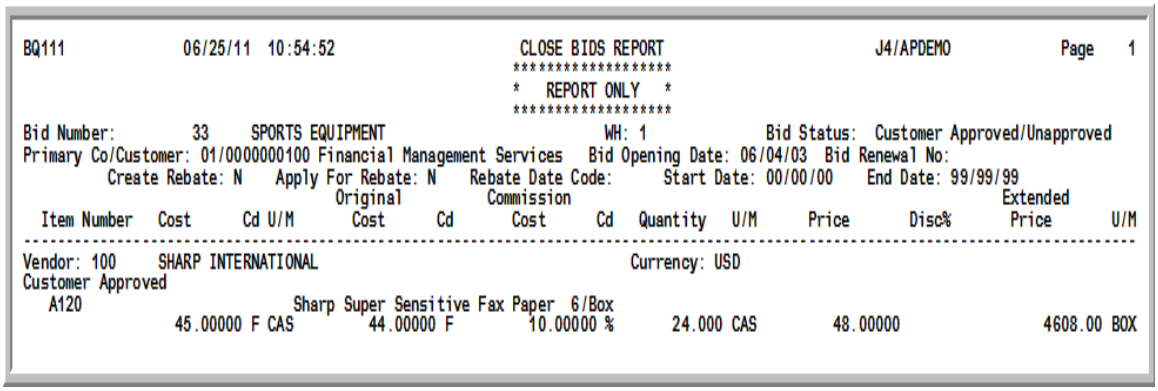
This screen displays after selecting option 2 - Close Bids from MENU BQMAIN. Use this screen to close the desired bid and/or print the Close Bids Report. By closing a bid, you will be updating the

Vendor Rebate File with any applicable rebates that have been assigned to any won items on the selected bid. When you press **ENTER**, the Close Bids Confirmation Screen displays the description and the primary customer for the selected bid.

Close Bids Screen Fields and Function Keys

Field/Function Key	Description
Bid Number	Use this field to enter the bid number of the bid you want to close. Key the appropriate bid number. (A 10) Required
Report Type	Use this field to either print only the Close Bids Reporter to close the selected bid and print the Close Bids Report. If you enter **U**, the Vendor Rebate File will also be updated for any applicable rebates. Key **R** in this field to only print the Close Bids Report. Key **U** to close the selected bid, update the Vendor Rebate File, and to print the Close Bids Report. (A 1) Required
Description	This field displays the description of the selected bid on the Close Bids Confirmation Screen that displays when you press **ENTER**. Display
Co/Customer	This field displays the primary company and customer number of the customer for the selected bid on the Close Bids Confirmation Screen that displays when you press **ENTER**. Display
F3=Exit	Press the **F3=EXIT** function key to return to MENU BQMAIN without closing a bid.
Enter	Press **ENTER** to confirm your selections. You will be required to press this key again to confirm your selections. The Report Options Screen will display. Refer to the Infor Distribution A+ Cross Applications User Guide for a detailed explanation of the Report Options Screen.

Close Bids Report



```
BQ111            06/25/11  10:54:52                  CLOSE BIDS REPORT                        J4/APDEMO            Page    1
                                                     ******************
                                                     *   REPORT ONLY    *
                                                     ******************
Bid Number:         33     SPORTS EQUIPMENT                        WH: 1            Bid Status:  Customer Approved/Unapproved
Primary Co/Customer: 01/0000000100 Financial Management Services   Bid Opening Date: 06/04/03  Bid Renewal No:
          Create Rebate: N    Apply For Rebate: N    Rebate Date Code:      Start Date: 00/00/00    End Date: 99/99/99
                                 Original          Commission                                              Extended
  Item Number   Cost      Cd U/M      Cost      Cd      Cost      Cd   Quantity   U/M      Price       Disc%       Price       U/M
-------------------------------------------------------------------------------------------------------------------------------
Vendor: 100     SHARP INTERNATIONAL                                    Currency: USD
Customer Approved
   A120                          Sharp Super Sensitive Fax Paper  6/Box
                45.00000 F CAS        44.00000 F        10.00000 %      24.000 CAS        48.00000                4608.00 BOX
```

This report prints after entering your selections on the Close Bids Screen. This report prints vendor/item information for the line/sub-lines of the items entered for this bid through Enter, Change, Delete Bids (MENU BQMAIN).

Note: If you selected R, for report only, in the Report Type field on the Close Bids Screen, then *** REPORT ONLY *** will print in the header of this report, indicating that the bid was not closed and the Vendor Rebate File was not updated.

Close Bids Report

Field/Function Key	Description
Headings	Program names appear on the upper left corner of the report followed by run date and time, report title, workstation ID, User ID, and page number. Summary of the selection criteria prints in the center of the headings area followed by the individual field headings.
Vendor Information	This field prints the vendor number, vendor name, vendor approval code, and vendor currency code of this line/sub-line item for this bid.
Item Number	This field prints the item number and description of this item. Cost/CdThis field prints the vendor cost and cost code of this item.
U/M	This field prints the costing unit of measure for this item.
Original Cost/Cd	This field prints the original cost and original cost code for this item.
Commission Cost/Cd	This field prints the commission cost and commission cost code for this item.
Quantity	This field prints the quantity of this item for this line/sub-line.
U/M	This field prints the stocking unit of measure for this item.

Field/Function Key	Description
Price	This field print the bid price submitted by the customer for this item on the selected bid.
Disc%	This field prints the discount percentage and discount code offered by the customer for this item.
Extended Price	This field prints the extended price for this item.
U/M	This field prints the pricing unit of measure for this item.

Chapter 4 Performing An Item Inquiry

Item Inquiry

You can inquire into item information for an item number through Item Inquiry (MENU IAMAIN).

Refer to the Infor Distribution A+ Inventory Accounting User Guide for a detailed explanation of Item Inquiry.

Chapter 5 Performing An Open/Closed Bid Inquiry

You can display information for bids that have been opened through Enter, Change, Delete Bids (MENU BQMAIN), and bids that have been closed on the Bid Item Detail Selection Screen through Open/Closed Bid Inquiry.

Open/Closed Bid Inquiry

The screens and/or reports in Open/Closed Bid Inquiry and a brief description of their purpose are listed in the following table. A complete description of each is provided in this section.

Title	Purpose
Open/Closed Bid Inquiry Selection Screen	Used to display bids.
Open/Closed Bid Inquiry Screen	Used to display a summary of a bid.
Open/Closed Bid Inquiry Header Display Screen	Used to review bid information.
Vendor Listing Inquiry Screen	Use to display a list of vendors who have been assigned to this bid.
Vendor Information Inquiry Screen	Use to review override vendor information for the selected vendor for this bid/
Display Bid Header Comments Inquiry Screen	Used to review bid header comments for the bid being processed.
Display Line Item Comments Inquiry Screen	Used to enter/review line item comments for an item.
Bid & Quote Rebate Customers Inquiry Include Screen	Use to review the rebate customers that are included on this bid.
Open/Closed Bid Inquiry End Bid Screen	Use to review summary information regarding vendor and customer approvals.
Bid & Quote Rebate Customers Inquiry Exclude Screen	Used to review the customers that will be excluded from the rebates for this bid.

Title	Purpose
Bid Item Detail Selection Screen	Used to select a line item of the bid for which to display further details.
Specify Item Detail Limits Inquiry Screen	Use to select approval code, item number, and cost/price limits for the display of items on the Bid Item Detail Selection Screen.
Bid Item Detail Display Screen	Used to review information for a bid line item.
Original Cost Inquiry Screen	Use to review the average, user, standard and last Cost of the item.

Open/Closed Bid Inquiry Selection Screen

d

```
                        OPEN/CLOSED BID INQUIRY

    Bid Number:          .........
    Customer Bid Number: ....................

    Bid Type:            B (O=Open C=Closed B=Both)

    Co?Customer?         ... ...........
    Salesrep?            ......
    Vendor?              .......
    Buyer?               ....

    Bid Status:          .. 1=Rdy to Print RFQ     4=Quote Printed
                            2=Vendor RFQ Printed   5=Cust Approved/Rejected
                            3=Rdy to Print Quote   9=Held   Hold Code? ...

    Bid Opening Date:    .......  to  .......
    Vendor Due Date:     .......  to  .......
    Customer Due Date:   .......  to  .......
    Rebate Start Date:   .......  to  .......
    Rebate End Date:     .......  to  .......
 ____________________________________________________________________________

                                                                    F3=Exit
```

This screen displays after selecting option 12 - Open/Closed Bid Inquiry from MENU BQMAIN. The fields on this screen allow you to filter which bids you want to display information for through this inquiry.

Use the selection criteria on this screen to select the bids you want to display on the Open/Closed Bid Inquiry Screen.

Refer to the Infor Distribution A+ Cross Applications User Guide for an explanation of the rules for entering From/To Ranges.

Open/Closed Bid Inquiry Selection Screen Fields and Function Keys

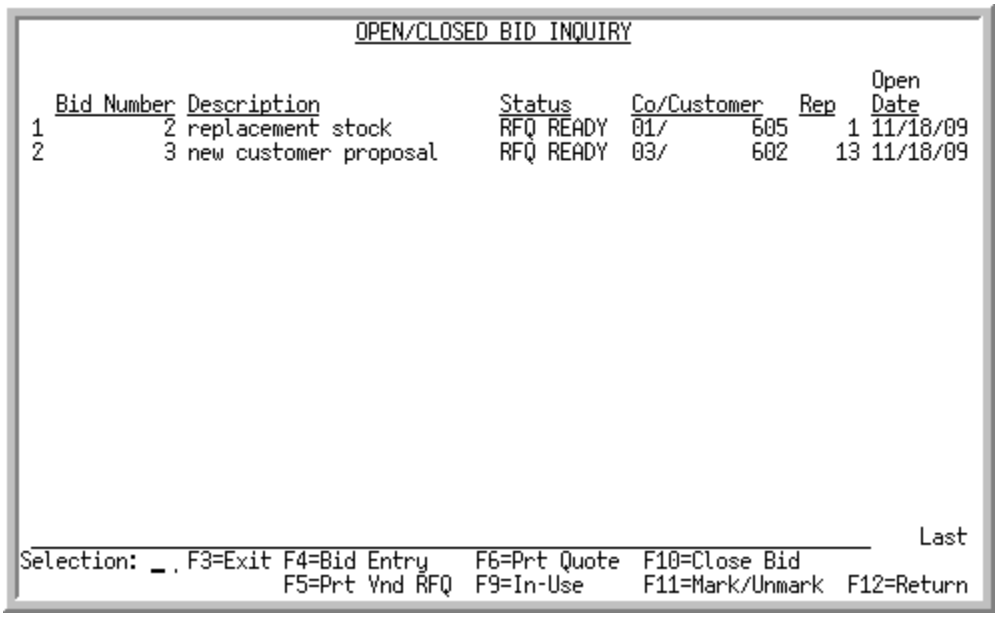
Field/Function Key	Description
Bid Number	This field limits the inquiry to a specific bid allowing you to view that bid only. Key the appropriate bid number. Leave this field blank to not use a bid number when selecting bids to display on the Open/Closed Bid Inquiry Screen. All bids that meet the selection criteria will display. **Note:** If a bid number is keyed, all other selection criteria will be ignored. If a nonexistent bid number is keyed, bids will not be displayed on the Open/Closed Bid Inquiry Screen. (A 10) Optional
Customer Bid Number	This field limits the inquiry to a specific customer bid number allowing you to view bids that match that customer bid number only. Key the appropriate customer bid number. Leave this field blank to not use a customer bid number when selecting bids to display on the Open/Closed Bid Inquiry Screen. **Valid Values:** An existing customer bid number previously entered through Enter, Change, Delete Bids (MENU BQMAIN). (A 10) Optional
Bid Type	This field limits the inquiry to a specific type of bid. Key **O** to display only bids that are open. Key **C** to display only bids that are closed. Key **B** to display both open and closed bids. Key the bid type you want to limit this inquiry to. **Default Value:** B (A 1) Required
Co/Customer	**Note:** A company number must be keyed if a salesrep or customer number is keyed. This field limits the inquiry to bids for a specific company and, if entered, customer number. Key the appropriate company number and/or customer number. Key a **?** in the Customer field to activate the customer search. **Valid Values:** Any valid company number that has been defined through Company Name Maintenance (MENU XAFILE) or any valid customer number that has been defined through Customer/Ship to Master Maintenance (MENU ARFILE). (N 2,0 / N 10,0) Optional

Field/Function Key	Description
Salesrep	**Note:** A company number must be keyed if a salesrep is keyed. This field limits the inquiry to bids for a specific salesrep. Key the appropriate salesrep number. **Valid Values:** Any valid sales representative defined through Salesrep Maintenance (MENU SAFILE). (N 5,0) Optional
Vendor	This field limits the inquiry to bids for a specific vendor. Key the appropriate vendor code. **Valid Values:** Any valid vendor defined through Vendor Maintenance (MENU POFILE) and entered for a bid through Enter, Change, Delete Bids (MENU BQMAIN). (A 6) Optional
Buyer	This field limits the inquiry to bids for a specific buyer. Key the appropriate buyer code. **Valid Values:** Any valid buyer defined through Buyer Maintenance (MENU POFILE) and entered for a bid through Enter, Change, Delete Bids (MENU BQMAIN). (A 3) Optional
Bid Status	This field limits the inquiry to a single bid status type. Key **1** to inquire on bids that are ready to print the Vendor RFQ. Key **2** to inquire on bids that have the Vendor RFQ printed. Key **3** to inquire on bids that are ready to print the Customer Quote. Key **4** to inquire on bids that have the Customer Quote printed. Key **5** to inquire on bids that are customer approved. Key 9 to inquire on bids that are held. If this field is left blank, all bid status types will display. **Note:** Bid status applies to open bids only and is ignored for closed bids. (N 1,0) 0ptional
Hold Code	This field limits the inquiry to held bids for a specific hold code. Key the appropriate hold code. **Valid Values:** Any valid hold code defined through Order Hold Codes Maintenance (MENU OEFILE). **Note:** If a hold code is keyed, the bid status must be **9**. (A 2) Optional

Field/Function Key	Description
Bid Opening Date	This field limits the inquiry to bids assigned the bid opening date or the range of bid opening dates entered in this field. Bid opening dates are assigned through Enter, Change, Delete Bids (MENU BQMAIN). Key the appropriate bid opening date or the range of bid opening dates you wish to limit this inquiry to. **Valid Values:** A date keyed in the Default Date Format for this user, specified through Register A+ User IDs (MENU XACFIG), or if that field is blank, in the system's Default Date Format specified through System Options Maintenance (MENU XAFILE). (2 @ N 6,0) Optional
Vendor Due Date	This field limits the inquiry to bids assigned the vendor due date or the range of vendor due dates entered in this field. Vendor due dates are assigned through Enter, Change, Delete Bids (MENU BQMAIN). Key the appropriate vendor due date or the range of vendor due dates you want to limit this inquiry to. **Valid Values:** A date keyed in the Default Date Format for this user, specified through Register A+ User IDs (MENU XACFIG), or if that field is blank, in the system's Default Date Format specified through System Options Maintenance (MENU XAFILE). (2 @ N 6,0) Optional
Customer Due Date	This field limits the inquiry to bids assigned the customer due date or the range of customer due dates entered in this field. Customer due dates are assigned through Enter, Change, Delete Bids (MENU BQMAIN). Key the appropriate customer due date or the range of customer due dates you wish to limit this inquiry to. **Valid Values:** A date keyed in the Default Date Format for this user, specified through Register A+ User IDs (MENU XACFIG), or if that field is blank, in the system's Default Date Format specified through System Options Maintenance (MENU XAFILE). (2 @ N 6,0) Optional

Field/Function Key	Description
Rebate Start Date	This field limits the inquiry to bids assigned the rebate start date or the range of rebate start dates entered in this field. Rebate start dates are assigned through Enter, Change, Delete Bids (MENU BQMAIN). Key the appropriate rebate start date or the range of rebate start dates you want to limit this inquiry to. **Valid Values:** A date keyed in the Default Date Format for this user, specified through Register A+ User IDs (MENU XACFIG), or if that field is blank, in the system's Default Date Format specified through System Options Maintenance (MENU XAFILE). (2 @ N 6,0) Optional
Rebate End Date	This field limits the inquiry to bids assigned the rebate end date or the range of rebate end dates entered in this field. Rebate end dates are assigned through Enter, Change, Delete Bids (MENU BQMAIN). Key the appropriate rebate end date or the range of rebate end dates you want to limit this inquiry to. **Valid Values:** A date keyed in the Default Date Format for this user, specified through Register A+ User IDs (MENU XACFIG), or if that field is blank, in the system's Default Date Format specified through System Options Maintenance (MENU XAFILE). (2 @ N 6,0) Optional
F3=Exit	Press **F3=EXIT** to cancel this option. MENU BQMAIN will display.
Enter	Press **ENTER** to confirm your selections. The Open/Closed Bid Inquiry Screen will display, and the bids that match the selection criteria entered on this screen will be presented. If bids are not found that match the selection criteria, bids will not be listed in the Open/Closed Bid Inquiry Screen.

Open/Closed Bid Inquiry Screen



This screen displays after pressing **ENTER** on the Open/Closed Bid Inquiry Selection Screen. A summary line is displayed for each bid that falls within the selection criteria you have entered.

If you keyed in a vendor or buyer code on the Open/Closed Bid Inquiry Selection Screen, then the bid summary lines will be displayed with open bids first, then closed bids. Within the open or closed bids, the bids will be displayed by bid number, lowest to highest.

If you keyed in a customer bid number, company/customer number, salesrep number, or bid status number on the Open/Closed Bid Inquiry Selection Screen, then the bid summary lines will be displayed in bid opening date order. Within that order the bids will be displayed by bid number, lowest to highest.

Use this screen to select a bid for which you want to display further details.

Open/Closed Bid Inquiry Screen Field and Function Keys

Field/Function Key	Description
(Reference Number)	This field displays the reference number corresponding to each bid displayed on this screen. Key this number in the Selection field on the lower portion of the screen to display further details for the selected bid. Display
Bid Number	This field displays the bid number of each bid displayed on this screen. Display

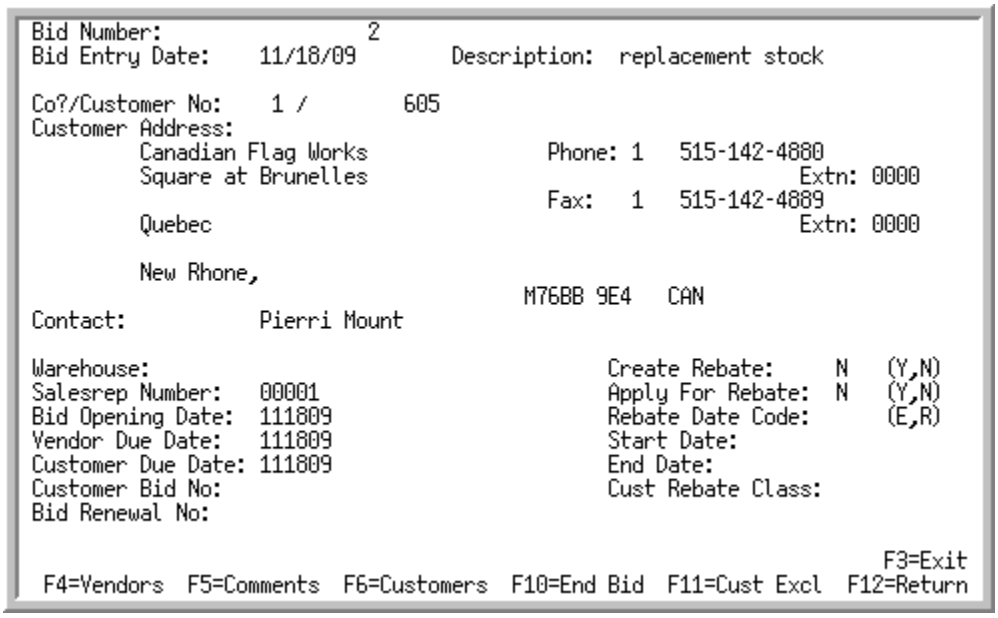
Field/Function Key	Description
Description	This field displays the description of each bid displayed on this screen. Display
Status	This field displays one of the following, as determined with the use of the **F9=IN-USE / F9=STATUS** toggle key. The current status of each bid displayed on this screen. The following status types may be displayed for a bid: • **RFQ Ready** - You have entered the items on the bid and are ready to send the request to the vendor(s) for cost quoting. • **RFQ Printd** - You have entered the items on the bid and have sent the request to the vendor(s) for cost quoting. • **Quote Rdy** - You are ready to send the quoted prices to the customer. **Note:** Two conditions must be met in order to attain a status of **Quote Rdy**: 1 Every line of the bid must have a vendor approval code of **Y** or **N**. No lines can have a blank vendor approval code. 2 Every line that has a vendor approval code of **Y** must have customer price information entered. **Note:** To determine which lines do not meet the above two conditions, you can use the **F23=LIMITS** key on the Bid Item Detail Selection Screen to access the Specify Item Detail Limits Screen (MENU BQMAIN). This screen displays lines that have blank vendor approval codes and/or zero price lines. • **Quote Prtd** - You have done the above and have sent the quote to the customer. • **Appr/Rejcd** - The customer has approved or rejected the quote. **Note:** Every line of the quote must have a customer approval code of **Y** or **N** in order to attain a status of **Appr/Rejcd**. Lines can not have a blank customer approval code. • **Closed** - The bid has been closed via Close Bids (MENU BQMAIN). • **Held-XX** - The bid has been placed on hold via Enter, Change, Delete Bids (MENU BQMAIN), where XX is the hold code.

Field/Function Key	Description
	In-UseThis field displays one of the following, as determined with the use of the **F9=IN-USE / F9=STATUS** toggle key. The current status of each bid that is in-use at another workstation. The following status types may be displayed for a bid that is in-use, where WS is the workstation ID: • **WS-Bid Mnt** - The bid is currently being maintained at another workstation via Enter, Change, Delete Bids (MENU BQMAIN). • **WS-Prt RFQ** - The vendor RFQ is currently being printed at another workstation via Print Vendor RFQ's (MENU BQMAIN). • **WS-Prt Qte** - The customer quote is currently being printed at another workstation via Print Customer Quote (MENU BQMAIN). • **WS-Closing** - The bid is currently being closed at another workstation via Close Bids (MENU BQMAIN). • **WS-Marked** - The bid is currently marked at another workstation via Open/Closed Bid Inquiry (MENU BQMAIN). Display
Co/Customer	This field displays the company number and customer number of each bid displayed on this screen. Display
Rep	This field displays the salesrep number of each bid displayed on this screen. Display
Open Date	This field displays the bid opening date of each bid displayed on this screen. Display
Selection	Use this field to select one of the bids displayed on this screen. This field allows you to access detail information for that particular bid. Key the number from the reference column that corresponds to the bid you wish to display in detail, and press **ENTER**, or use one of the appropriate function keys to proceed. (N 2,0) Required
F3=Exit	Press **F3=EXIT** to cancel this option. MENU BQMAIN will display.

Field/Function Key	Description
F4=Bid Entry	After selecting the reference number of the bid in the Selection field, press **F4=BID ENTRY** to display the Bid & Quote Header Screen for the selected bid. You will not be able to use the **F4=BID ENTRY** key on a closed bid, or on a bid that is in use at another workstation.
F5=Prt Vnd RFQ	After marking the bids, and pressing the **F11=MARK/UNMARK** function key to print the Vendor RFQ, press **F5=PRT VND RFQ** to display the Print Vendor RFQ's Screen. You will not be able to use the **F5=PRT VND RFQ** key on a held bid. If the **F5=PRT VND RFQ** key is pressed with a held bid marked, the screen will redisplay with the marked held bid at the top of the list. You must unmark the held bid before pressing the **F5=PRT VND RFQ** key again.
F6=Prt Quote	After marking the bids, and pressing the **F11=MARK/UNMARK** function key to print the Vendor RFQ, press **F6=PRT QUOTE** to display the Print Customer Quotes Screen. You will not be able to use the **F6=PRT QUOTE** key on a held bid. If the **F6=PRT QUOTE** key is pressed with a held bid marked, the screen will redisplay with the marked held bid at the top of the list. You must unmark the held bid before pressing the **F6=PRT QUOTE** key again. You will not be able to use the **F6=PRT QUOTE** key on a bid that has a bid status of 1=Ready to Print RFQ or 2=Vendor RFQ Printed. If the **F6=PRT QUOTE** key is pressed with a marked bid of status 1 or 2, the screen will redisplay with the marked bid at the top of the list. You must unmark the bid before pressing the **F6=PRT QUOTE** key again.
F9=In-Use/Status	Press **F9=IN-USE / F9=STATUS** to toggle between displaying the bid status of all displayed bids and the bid status of all bids that are in-use at another workstation.
F10=Close Bid	After marking the bids and using the **F11=MARK/UNMARK** function key to select bids to close, press **F10=CLOSE BID** to display the Close Bids Screen. You will not be able to use **F10=CLOSE BID** key on a held bid. If **F10=CLOSE BID** key is pressed with a held bid marked, the screen will redisplay with the marked held bid at the top of the list. You must unmark the held bid before pressing **F10=CLOSE BID** key again.

Field/Function Key	Description
F11=Mark/Unmark	Use **F11=MARK/UNMARK** to mark bids for which you want to print the Vendor RFQ or Customer Quote, or bids you want to close. After keying the reference number of the bid in the Selection field, press the **F11=MARK/UNMARK** function key to mark that bid (to unmark a bid, rekey the reference number of the bid and press this key again). All bids designated as marked will be displayed in reverse image. You will not be able to mark a closed bid. You will not be able to mark a bid that is in-use at another workstation.
F12=Return	Press **F12=RETURN** to return to the Open/Closed Bid Inquiry Selection Screen.
Enter	After selecting the reference number of a bid in the Selection field, press **ENTER** to display the Open/Closed Bid Inquiry Header Display Screen.

Open/Closed Bid Inquiry Header Display Screen



This screen displays after you enter the reference number of a bid in the Selection field on the Open/Closed Bid Inquiry Screen, and press **ENTER**. Use this screen to review bid information entered through Enter, Change, Delete Bids (MENU BQMAIN) for the selected open or closed bid.

Use the function keys on this screen to display the following additional information for this open or closed bid:

- Vendors Listing Inquiry Display Screen
- Enter/Change Bid Header Comments Display Screen
- Rebate Customers List Display Screen
- Bid & Quote End Display Screen
- Customer Exclude Display Screen

All the fields on this screen are display only and cannot be changed.

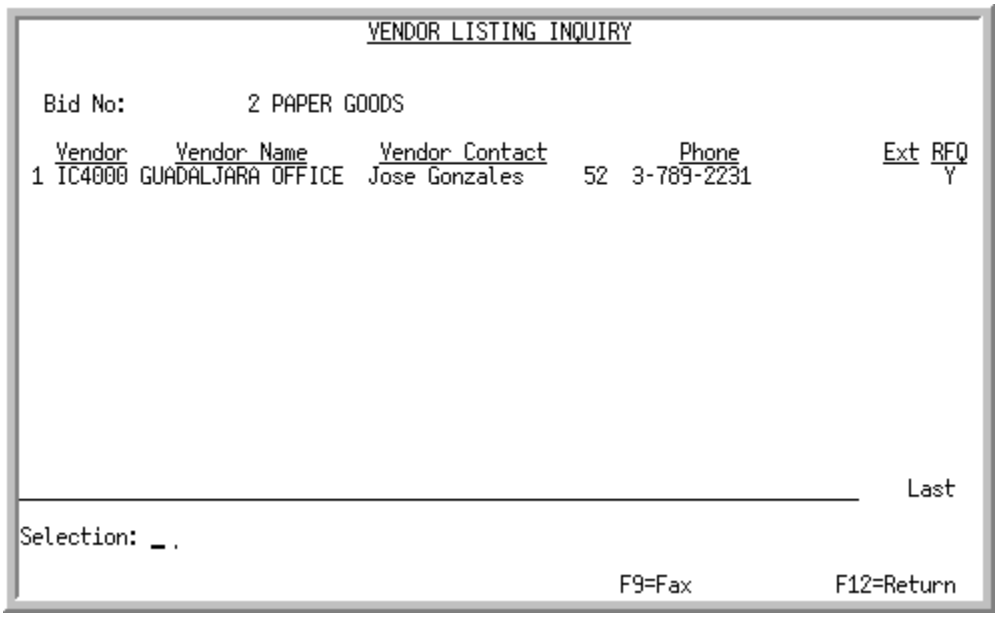
Open/Closed Bid Inquiry Header Display Screen Fields and Function Keys

Field/Function Key	Description
Bid Number	This field displays the bid number selected on the Open/Closed Bid Inquiry Screen
Bid Entry Date	This field displays the date the selected bid was created. Description This field displays the bid description of the selected bid.

Field/Function Key	Description
Co/Customer No	This field displays the primary company and customer number of the selected bid.
Customer Address	This field displays the name and address lines 1-4 of the customer who requested the selected bid.
Phone/Extn	This field displays the telephone and extension number of the customer who requested the selected bid. The country access code is included.
Fax/Extn	This field displays the fax telephone and extension number of the customer who requested the selected bid. The country access code is included.
(City)	This field displays the city of the customer who requested the selected bid. (St/Prov)This field displays the state/province code of the customer who requested the selected bid.
(Zip/Pstl)	This field displays the zip or postal code of the customer who requested the selected bid.
(Cntry)	This field displays the country code of the customer who requested the selected bid.
Contact	This field displays the name of the contact person for the customer who requested the selected bid.
Warehouse	This field displays the warehouse for which rebates will be valid for the selected bid. If this field is blank, rebates will be valid for all warehouses.
Salesrep Number	This field displays the salesrep number of the primary sales representative associated with the customer who requested the selected bid.
Bid Opening Date	This field displays the date that the selected bid is to be open to participating vendors.
Vendor Due Date	This field displays the date that the selected bid is due from the associated vendors.
Customer Due Date	This field displays the date all bid responses (customer quotes) are due to the customer who requested the selected bid.
Customer Bid No	This field displays the customer’s bid number that this customer has assigned to the selected bid.
Bid Renewal No	This field indicates whether the bid number of a previous bid for which the selected bid is to have the same bid information.
Create Rebate	This field indicates whether or not rebates will be created when you close bids (MENU BQMAIN) when the Report Type is U (Update).

Field/Function Key	Description
Apply For Rebate	This field indicates whether or not reimbursement for the rebate of the selected bid is to be requested from the vendor, or if the rebate has already been incorporated into the cost of the item(s).
Rebate Date Code	This field indicates whether you wish to use the sales order entry date or the sales order requested ship date when retrieving a rebate for the selected bid while in order entry.
Start Date	This field displays the start date of all rebates for the selected bid.
End Date	This field displays the end date of all rebates for the selected bid.
Customer Rebate Class	This field displays the customer rebate class for which the rebate for the selected bid is to be applied.
F3=Exit	Press **F3=EXIT** to cancel this option. MENU BQMAIN will display.
F4=Vendors	Press **F4=VENDORS** to display the Vendor Listing Inquiry Screen.
F5=Comments	Press **F5=COMMENTS** to display the Display Bid Header Comments Inquiry Screen.
F6=Customers	Press **F6=CUSTOMERS** to display the Bid & Quote Rebate Customers Inquiry Include Screen.
F10=End Bid	Press **F10=END BID** to display the Open/Closed Bid Inquiry End Bid Screen.
F11=Cust Excl	Press **F11=CUST EXCL** to display the Bid & Quote Rebate Customers Inquiry Exclude Screen.
F12=Return	Press **F12=RETURN** to return to the Open/Closed Bid Inquiry Screen.
Enter	Press **ENTER** the Bid Item Detail Selection Screen.

Vendor Listing Inquiry Screen



This screen displays after pressing the **F4=VENDORS** key from the Open/Closed Bid Inquiry Header Display Screen. Use this screen to display a list of vendors who have been assigned to this bid through the Add Item Screen. This screen may also be used to select a vendor to view any override vendor information that has previously been entered for that vendor for this bid.

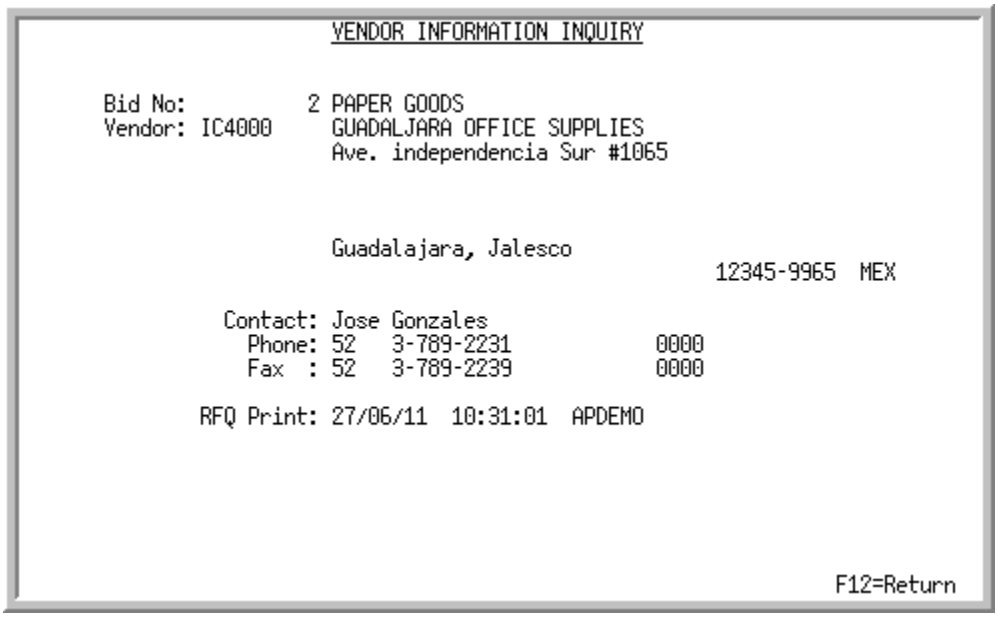
Note: Only those vendors who have already been assigned to the bid will display on this screen. If no line/sub-lines have been entered on the bid being processed, this screen will be blank.

Vendor Listing Inquiry Screen Fields and Function Keys

Field/Function Key	Description
(Bid Information)	The following bid number information displays in the upper portion of this screen: • **Bid Number**: This field displays the bid number you entered on the Open/ Closed Bid Inquiry Selection Screen for the selected bid. • **Bid Description**: This field displays the description entered for the selected bid. Display
Reference Number	This field displays the reference number of the vendor displayed on this screen. Use this field to determine which vendor you wish to view or change additional contact information by keying this number in the Selection field on the lower portion of this screen. Display

Field/Function Key	Description
Vendor	This field displays the vendor number of the vendor displayed on this screen. Display
Vendor Name	This field displays the vendor name of the vendor displayed on this screen. Display
Vendor Contact	This field displays the contact person assigned to the vendor displayed on this screen. Display
Phone/Fax Number	This two-way toggle column displays either the vendor phone number or the vendor fax number depending upon your selection with the **F9=PHONE / F9=FAX** key. Display
Ext	This field displays the extension number of either the phone number or the fax number for this vendor depending upon your selection with the **F9=PHONE / F9=FAX** key. Display
RFQ	This field displays whether a request for quote for the bid being processed has been printed for this vendor. If **Y** displays in this field, an RFQ has been printed for this vendor for the bid being processed. If **N** displays in this field, an RFQ has not been printed for this vendor for the bid being processed. Refer to Print Vendor RFQ's Screen (MENU BQMAIN) for a further explanation of Vendor RFQs. Display
Selection	Use this field to select one of the vendors displayed on this screen for which you wish to change/display vendor contact information for this bid. Key the number in the Sel column that corresponds to the vendor you want to select, and press **ENTER**. (N 2,0) Optional
F9=Phone/Fax	Press the **F9=PHONE / F9=FAX** two-way toggle key to display either the phone number with extension or fax number with extension for each vendor in the Phone Number / Fax Number column.
F12=Return	Press **F12=RETURN** to return to the Open/Closed Bid Inquiry Header Display Screen.
Enter	After keying a reference number in the Selection field, press **ENTER** to display the Vendor Information Inquiry Screen.

Vendor Information Inquiry Screen



This screen displays after pressing **ENTER** from the Vendor Listing Inquiry Screen. Use this screen to review bid specific vendor information for the selected vendor for this bid.

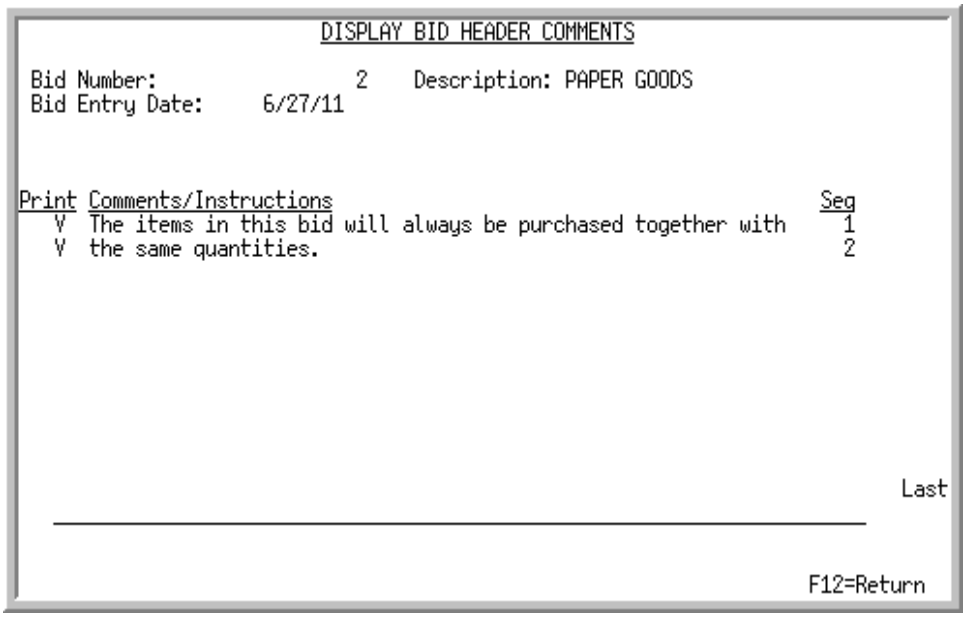
All the fields on this screen are display only and cannot be changed.

Vendor Information Inquiry Screen Fields and Function Keys

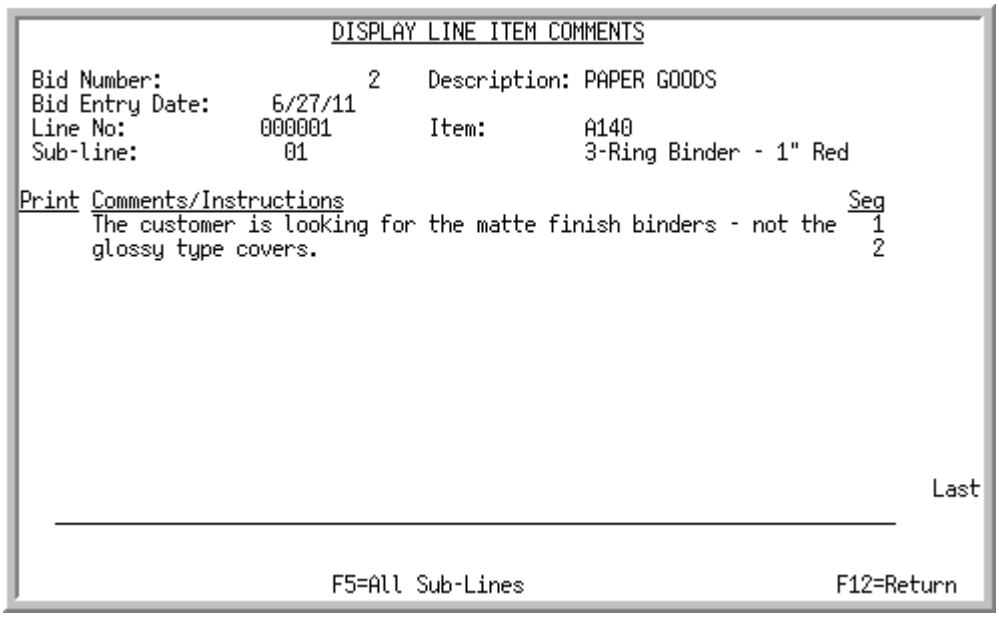
Field/Function Key	Description
Bid No	The bid number and description of the bid being processed.
Vendor	The vendor number, name and address of the selected vendor.
Contact	The name of contact person for this bid for the selected vendor.
Phone/Ext	The 3-character country access code, area code and telephone number with extension. Blank spaces are allowed between numerals only if Allow Blank Phone Delimiters is **Y** in Systems Options Maintenance (MENU XAFILE).
Fax/Ext	The 3-character country access code, area code and telephone number with extension for the number that will be used for faxing. Blank spaces are allowed between numerals only if Allow Blank Phone Delimiters is **Y** in Systems Options Maintenance (MENU XAFILE).

Field/Function Key	Description
RFQ Print	This field represents the RFQ print date, if applicable. Additionally, the time, user name, and time printed will display if the RFQ has been printed.
F12=Return	Press **F12=RETURN** to return to the Vendor Listing Inquiry Screen without updating vendor information.

Display Bid Header Comments Inquiry Screen



Display Line Item Comments Inquiry Screen



The Display Bid Header Comments Inquiry Screen displays after pressing the **F5=COMMENTS** key from the Open/Closed Bid Inquiry Header Display Screen. Use this screen to enter/review bid header comments for the bid being processed. You may enter up to 98 lines of free form comments.

The Display Line Item Comments Inquiry Screen displays after pressing the **F5=COMMENTS** key from the Bid Item Detail Display Screen. Use this screen to enter/review line item comments for the selected item. You may enter up to 98 lines of free form comments.

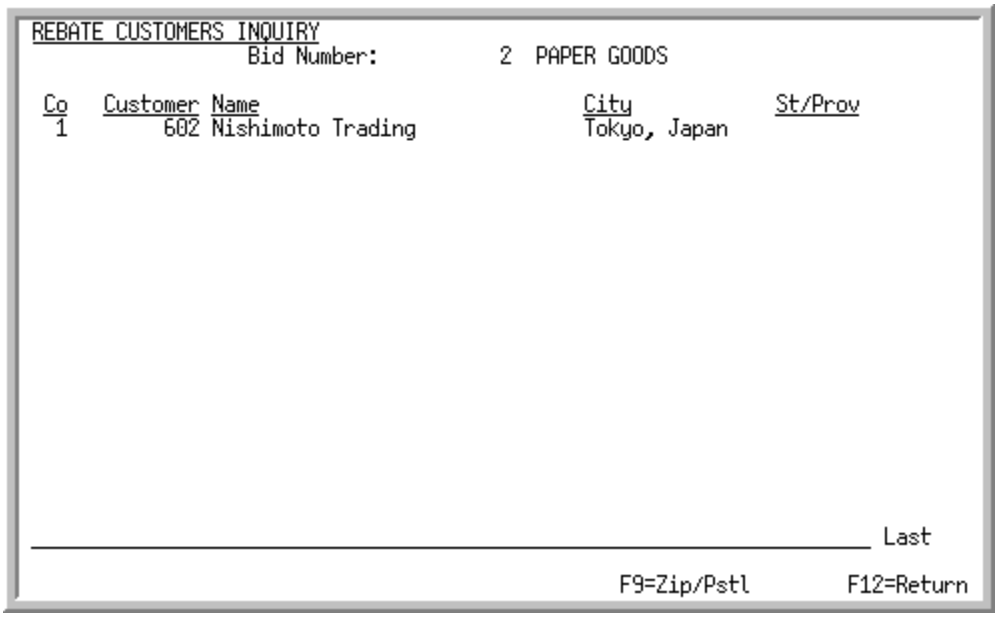
All the fields on this screen are display only and cannot be changed.

Display Bid Header Comments Inquiry Screen and Display Line Item Comments Inquiry Screen Fields and Function Keys

Field/Function Key	Description
Bid Number	This field displays the bid number selected on the Open/Closed Bid Inquiry Selection Screen for the selected bid.
Bid Description	This field displays the description entered for the selected bid.
Bid Entry Date	This field displays the bid entry date for the selected bid.
Line No	The **Line No** field only displays on the Display Line Item Comments Inquiry Screen. This field displays the line number of the selected item.
Sub-Line	The Sub-Line field only displays on the Display Line Item Comments Inquiry Screen. This field displays the sub-line number of the selected item; ***ALL** displays if the comment/instruction is for all the sub-lines for this item in the bid.
Item	The Item field only displays on the Display Line Item Comments Inquiry Screen. This field displays the item number and description of the selected item.
Print	This field represents the print code, if applicable, to be assigned to each line of comment text. An **X** indicates the associated comment text will print on the Bid/Quote Worksheet, Customer Quote, and the Vendor RFQ only. A **C** indicates the associated comment text will print on the Customer Quote Document and Bid/Quote Worksheet only. A **V** indicates the associated comment text will print on the Vendor RFQ Document and the Bid/Quote Worksheet only. A **blank** field indicates the associated comment text will not print on any Bid & Quote documents or reports. The comment will display in the inquiry.
Comments/Instructions	Displays up to 98 lines of free form comments/instructions to be associated with the selected bid or with the selected item.

Field/Function Key	Description
F5=All Sub-Lines/This Sub-Line	Use the **F5=ALL SUB-LINES / F5=THIS SUB-LINE** two-way toggle key to review the selected comments for this sub-line number or for all sub-lines associated with the selected line number.
F12=Return	Press **F12=RETURN** to return to either the Open/Closed Bid Inquiry Header Display Screen or the Bid Item Detail Display Screen without saving your changes or additions.

Bid & Quote Rebate Customers Inquiry Include Screen



This screen displays after pressing **F6=CUSTOMERS** on the Open/Closed Bid Inquiry Header Display Screen. Use this screen to review the rebate customers that are included with the primary customer associated with this bid. Customers listed on this screen will be eligible for rebates for any won items on the bid. These customers are a sub-group of primary customers who requested quotes for the bid being processed.

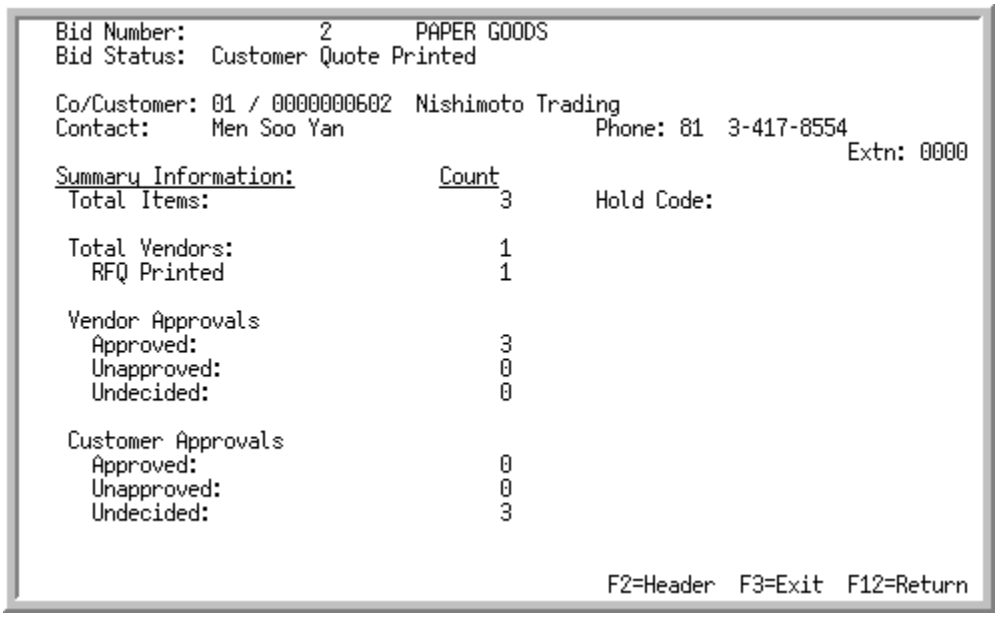
All the fields on this screen are display only and cannot be changed.

Bid & Quote Rebate Customers Inquiry Include Screen Fields and Function Keys

Field/Function Key	Description
Bid Number	The Bid Number and description assigned on to the selected bid with the description entered for the selected bid.
Co	This field displays the company of the customer displayed on this screen.
Customer	This field displays the customer number of the customer entered for this exclusion
	NameThis field displays the customer name of the customer entered for this exclusion.
Name	This field displays the customer name of the customer entered for this exclusion.
City	This field displays the city of the customer displayed on this screen.

Field/Function Key	Description
St/Prov or Zip/Pstl	This column displays either the customer's state/province or zip/postal code, depending on your selection with the **F9=ZIP/PSTL / F9=ST/PROV** toggle key.
F9=Zip/Pstl / F9=St/ Prov	Press **F9=ZIP/PSTL / F9=ST/PROV** to toggle between displaying the customer's state/province and zip/postal code in the last column.
F12=Return	Press **F12=RETURN** to return to the Open/Closed Bid Inquiry Header Display Screen.

Open/Closed Bid Inquiry End Bid Screen



This screen displays after pressing **F10=END BID** on the Open/Closed Bid Inquiry Header Display Screen or after pressing **F10=END** on the Bid Item Detail Selection Screen.

This screen displays a summary of the bid being processed and the current status of the bid.

All the fields on this screen are display only and cannot be changed.

Open/Closed Bid Inquiry End Bid Screen Fields and Function Keys

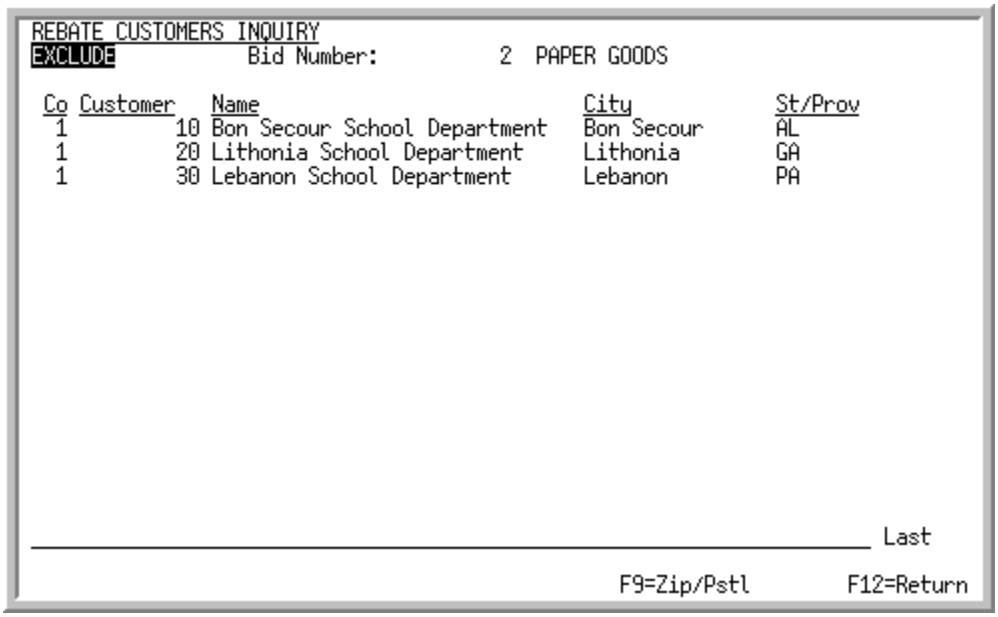
Field/Function Key	Description
Bid Number	The Bid Number assigned on to the selected bid with the description entered for the selected bid.

Field/Function Key	Description
Bid Status	This field displays the current status of the selected bid. Bid status types may be one of the following: • **RFQ Ready**: The bid has been entered, items and vendors have been assigned to the bid, and you are ready to send the request for quotes to the appropriate vendors. • **RFQ Printed:** The bid has been entered, items and vendors have been assigned to the bid, and you have printed/faxed and sent the request for quotes to the appropriate vendors. • **Quote Ready**: The appropriate vendors have received the request for quotes and have returned bids with their cost information, you have entered that vendor cost and marked all line/sub-lines as vendor approved/rejected (Y or N), and all vendor approved line/ sub-lines have had item price information entered. • **Quote Printed**: All line/sub-lines of the bid have been vendor approved/rejected, all vendor approved line/sub-lines have had item customer price information entered, and you have printed/ faxed and sent the quote to the customer. • **Approved/Rejected**: The customer has received the quote, returned it to you, and you have marked all applicable line/sub-lines as customer approved/rejected. • **Closed**: All line/sub-lines of the quote have been marked as customer approved/rejected and you have closed the bid through Close Bids (MENU BQMAIN). • **Held-XX**: The bid has been placed on hold on the Open/Closed Bid Inquiry End Bid Screen, XX representing the hold code used to put the bid on hold. • **WS-Bid Mnt**: The bid is currently being maintained at another workstation. • **WS-Prt RFQ**: The vendor RFQ is currently being printed at another workstation. • **WS-Prt Qte**: The customer quote is currently being printed at another workstation. • **WS-Closing**: The bid is currently being closed at another workstation. • **WS-Marked**: The bid is currently being maintained through Open/ Closed Bid Inquiry (MENU BQMAIN).
Co/Customer	The Co/Customer field displays the primary company and customer number of the customer who requested quotes for the selected bid and also the customer name.
Contact	This field displays the contact for primary customer for the selected bid.

Field/Function Key	Description
Phone	This field displays the telephone number of the primary customer for the selected bid.
Extn	This field displays the extension of the telephone number of the primary customer for the selected bid.
Total Items	This field displays the total number of items entered for the selected bid.
(Vendor Information)	The following vendor information for this bid displays on this screen: • **Total Vendors**: This field displays the total number of vendors associated with the selected bid. • **RFQ Printed**: This field displays the total number of RFQs (request for quotes) printed to date for the selected bid.
Vendor Approvals	The following vendor approval information for this bid displays on this screen: • **Approved**: This field displays the number of approved vendor line/sub- lines that currently exist for the items entered for the selected bid. • **Unapproved**: This field displays the number of rejected vendor line/sub- lines that currently exist for the items entered for the selected bid. • **Undecided**: This field displays the number of undecided vendor line/sub- lines that currently exist for the items entered for the selected bid.
	Customer ApprovalsThe following customer approval information for this bid displays on this screen: • **Approved**: This field displays the number of customer approved line/sub- lines that currently exist for the items entered for the selected bid. • **Unapproved**: This field displays the number of customer rejected line/ sub-lines that currently exist for the items entered for the selected bid. • **Undecided**: This field displays the number of customer undecided line/ sub-lines that currently exist for the items entered for the selected bid.
Hold Code	The hold code selected to place this bid on hold.
F2=Header	Press **F2=HEADER** to display the Open/Closed Bid Inquiry Header Display Screen.
F3=Exit	Press **F3=EXIT** to exit this option. MENU BQMAIN will display.

Field/Function Key	Description
F12=Return	Press **F12=RETURN** to return to the Bid Item Detail Display Screen. If you have entered or removed a hold code from the selected bid, it will be updated.
Enter	Press **ENTER** to return to the Open/Closed Bid Inquiry Screen.

Bid & Quote Rebate Customers Inquiry Exclude Screen



This screen displays after you press **F11=CUST EXCL** on the Open/Closed Bid Inquiry Header Display Screen. Use this screen to review customers to be excluded from rebates for the bid being processed. Customers displayed on this screen will not be eligible for rebates for any won item(s) on the bid being processed.

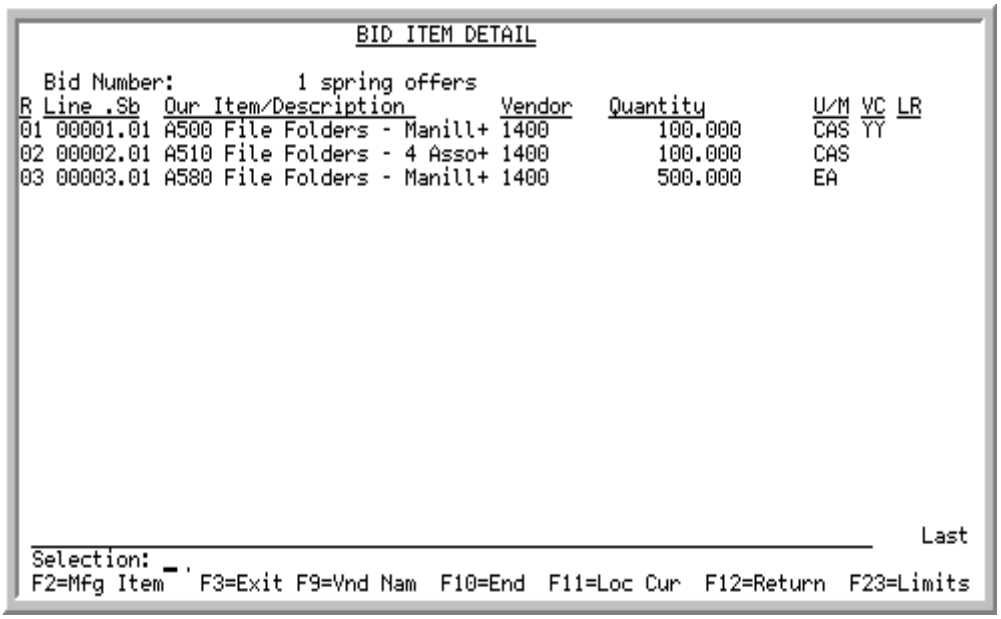
All the fields on this screen are display only and cannot be changed.

Bid & Quote Rebate Customers Inquiry Exclude Screen Fields and Function Keys

Field/Function Key	Description
Bid Number	The Bid Number assigned on to the selected bid with the description entered for the selected bid.
Co	This field displays the company of the customer displayed on this screen.
Customer	This field displays the customer number of the customer entered for this exclusion.
Name	This field displays the customer name of the customer entered for this exclusion.
City	This field displays the city of the customer displayed on this screen.
St/Prov or Zip/Pstl	This column displays either the state/province or the zip/postal code of the customer displayed on this screen, depending on your selection with the **F9=ZIP/PSTL / F9=ST/PROV** toggle key.

Field/Function Key	Description
F9=Zip/Pstl or St/Prov	Press **F9=ZIP/PSTL / F9=ST/PROV** to toggle between displaying the customer's state/province and zip/postal code in the last column.
F12=Return	Press **F12=RETURN** to return to the Open/Closed Bid Inquiry Header Display Screen.

Bid Item Detail Selection Screen



This screen displays after pressing **ENTER** on the Open/Closed Bid Inquiry Header Display Screen. A summary line is displayed for each line item of the selected bid. Use this screen to select a line item of the bid for which you want to display further details.

Note:

- This is a roll screen. More... appears at the bottom of a roll screen to indicate that more data is available for viewing. Last appears at the bottom of the last screen of data. To scroll through information on roll screens press:
- *__PAGE DOWN__ or __SHIFT-ROLL FWD__ or __F7=PAGE DOWN__ to display the next screen
- *__PAGE UP__ or __SHIFT-ROLL BACK__ or __F8=PAGE UP__ to display the previous screen.

Bid Item Detail Selection Screen Fields and Function Keys

Field/Function Key	Description
Bid Number	This field displays the bid number and corresponding bid description you selected on the Open/Closed Bid Inquiry Header Display Screen. Display

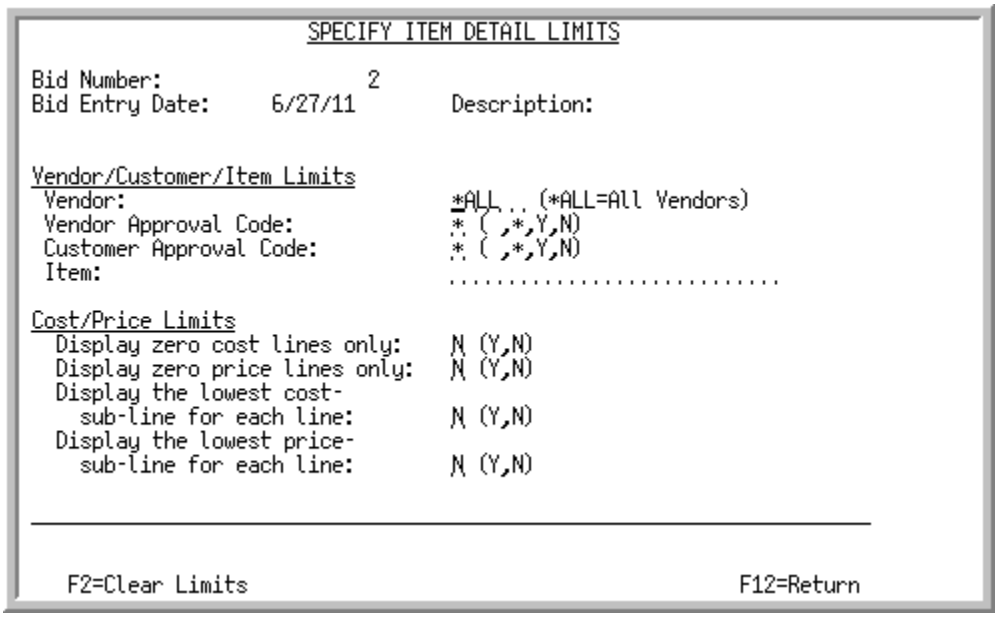
Field/Function Key	Description
R	This field displays the reference number corresponding to each line item of the selected bid. Key this number in the Selection field on the lower portion of the screen to display further details for the selected line item. Display
Line.Sb	This field displays the line and sub-line number for this item. Display
Our Item/Description / Mfg Item/Description / Orig Item/Description	This field toggles between the original item number and description, your customer item number and description, and the manufacturer's item number and description for this item, as determined with the use of the **F2=MFG ITEM / F2=CUST ITEM / F2=OUR ITEM** toggle key. Display
Vendor	This field displays the vendor number entered for this item. Display
Quantity / Vendor / Vendor Cst / Cust Unit Price	This column toggles between Quantity / Vendor / Vendor Cst / Cust Unit Price, as determined with the use of the **F9=VND NAM / F9=COST / F9=PRICE / F9=QTY** toggle key: • Quantity - the quantity requested for the item assigned to this line/sub- line. This field redisplays with the **F9=QTY** function key. • Vendor - the vendor name assigned to the item on this line/sub-line. This field redisplays with the **F9=VND NAM** function key. • Vendor Cst - the vendor cost for the item on this line/sub-line, and an additional column (C) which appears to the right of this column, showing you - the vendor cost code for this item. This field redisplays with the **F9=COST** function key. • Cust Unit Price - the customer unit price entered for the item on this line/ sub-line. This field redisplays with the **F9=PRICE** function key. Display

Field/Function Key	Description
U/M	This field displays one of the following values, depending on your selection of **the F9=VND NAM / F9=COST / F9=PRICE / F9=QTY** toggle key: • **F9=VND NAM** - there is no U/M field displayed for this toggle • **F9=QTY** - ordering unit of measure when the quantity is displayed • **F9=COST** - costing unit of measure when the vendor cost is displayed • **F9=PRICE** - pricing unit of measure when the customer unit price is displayed. Display
V	This field indicates whether or not this line item/vendor has been approved by the distributor. If this field displays Y, this line item/vendor has been approved the distributor. If this field displays N, this line item/vendor has been rejected by the distributor. If this field is blank, this line item has not been approved/rejected to date. Display
C	This field indicates whether or not this line item has been approved by its primary customer. If this field displays **Y**, this line item has been approved by its associated customer. If this field displays **N**, this line item has been rejected by its primary customer. If this field is blank, this line item has not been approved/rejected to date by its primary customer. Display
LR	This field displays the lost reason code, if applicable, if this line item has been rejected by its associated customer. Display
Cur	This field only displays when International Currency is installed. This field displays the company's local currency or trading currency for the vendor name, vendor cost, or customer unit price as determined with the use of the **F9=VND NAM / F9=COST / F9=PRICE** toggle key. This field does not display with the **F9=QTY** toggle key. Display

Field/Function Key	Description
Selection	Use this field to select one of the line items displayed on this screen. This field allows you to access detail information for that particular item. Key the number from the reference column that corresponds to the line item you want to display in detail, and press **ENTER**. (N 2,0) Required
F2=Mfg Item / F2=Cust Item / F2=Our Item	Press **F2=MFG ITEM / F2=CUST ITEM / F2=OUR ITEM** to toggle the item/description column between original item number and description, your customer item number and description, and the manufacturer's item number and description for this item.
F3=Exit	Press **F3=EXIT** to cancel this option. MENU BQMAIN will display.
F9=Vnd Nam / F9=Cost / F9=Price / F9=Qty	Press **F9=VND NAM / F9=COST / F9=PRICE / F9=QTY** to toggle the Quantity / Vendor Name / Vendor Cst / Cust Unit Price column and related fields to display one of the following values: • Press the **F9=QTY** function key to display the Quantity field - the quantity and ordering unit of measure requested for the item on the line/sub-line. • Press the **F9=VND NAM** function key to display the Vendor Name field- the vendor name assigned to the item on this line/sub-line. • Press the **F9=COST** function key to display the Vendor Cst - the vendor cost, cost code, and costing unit of measure entered for the item on this line/sub-line. • Press the **F9=PRICE** function key to display the Cust Unit Price - the customer unit price, price code, and pricing unit of measure entered for the item on this line/sub-line.
F10=End	Press **F10=END** to display the Open/Closed Bid Inquiry End Bid Screen.
F11=Loc Cur/F11=Trd Cur	The **F11=LOC CUR / F11=TRD CUR** function key only displays when International Currency is installed. The **F11=LOC CUR / F11=TRD CUR** function key works in conjunction with the **F9=VND NAM / F9=COST / F9=PRICE** toggles. The Cur column must be displayed for **F11=LOC CUR / F11=TRD CUR** toggle key to function. Press **F11=LOC CUR / F11=TRD CUR** to toggle between displaying the company's local currency or trading currency for an item's vendor name, vendor cost, or customer unit price.
F12=Return	Press **F12=RETURN** to return to the Open/Closed Bid Inquiry Header Display Screen.

Field/Function Key	Description
F23=Limits	Press **F23=LIMITS** to display the Specify Item Detail Limits Inquiry Screen.
F24=Double Line / F24=Single Line	**F24=DOUBLE LINE / F24=SINGLE LINE** is non-display. Press **F24=DOUBLE LINE / F24=SINGLE LINE** to toggle between double line mode and single line mode. The default mode of this screen is based on the selection to **Show 2nd Desc Line** as determined in System Options Maintenance (MENU XAFILE). In single line mode, the initial display shows the item number field based on the Longest Item Length field specified in System Options (MENU XAFILE) followed by the beginning of the item description. In double line mode, the two lines of item description are displayed below the full display of the item number field.
Enter	After selecting the reference number of a bid line item in the Selection field, press **ENTER** to display the Bid Item Detail Display Screen.

Specify Item Detail Limits Inquiry Screen



This screen displays after pressing **F23=LIMITS** on the Bid Item Detail Selection Screen. Use this screen to limit the items that display on the Bid Item Detail Selection Screen. By entering specific criteria limits, you can tailor which items on this bid you wish to display or work with at any given time.

Specify Item Detail Limits Inquiry Screen Fields and Function Keys

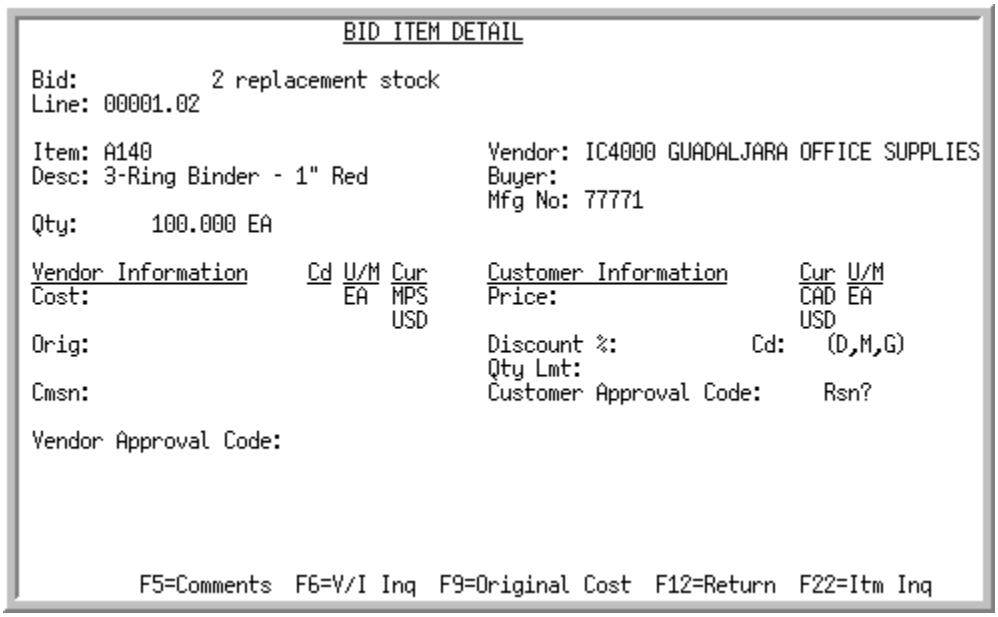
Field/Function Key	Description
Bid Number	This field displays the bid number assigned on for the selected bid. Display
Bid Entry Date	This field displays the bid entry date for the selected bid. Display
Description	This field displays the description entered for the selected bid. Display

Field/Function Key	Description
Vendor	Use this field to limit the line/sub-lines that display on the Bid Item Detail Selection Screen with the vendor limits you set in this field. Key ***ALL** to display all vendors for this bid. Key * **NONE** to display only line/sub-lines without a vendor assigned to them. Key a vendor number to display only lines/sublines with this vendor assigned to them. **Default Value:** *ALL **Valid Values:** *NONE or *ALL, or Vendor Number (A 6) Required
Vendor Approval Code	Use this field to display line/sub-lines on the Bid Item Detail Selection Screen and/or the with the vendor approval code limits you set in this field. Key **Y** to display line/sub-lines with a Vendor Approval Code of Y. Key **N** to display line/sub-lines with a Vendor Approval Code of N. Key * to display all line/sub-lines. Leave this field blank to display line/sub-lines without a Vendor Approval Code. **Default Value:** * (A 1) Optional
Customer Approval Code	Use this field to display line/sub-lines on the Bid Item Detail Selection Screen with the customer approval code limits you set in this field. Key **Y** to display line/sub-lines with a Customer Approval Code of **Y**. Key **N** to display line/sub-lines with a Customer Approval Code of **N**. Key * to display all line/sub-lines. Leave this field blank to display line/sub-lines without a Customer Approval Code. **Default Value:** * (A 1) Optional
Item	Use this field to limit the line/sub-lines that display on the Bid Item Detail Selection Screen with the item you set in this field. Key the specific item you wish to display. (A 27) Required/Optional

Field/Function Key	Description
Display zero cost lines only	Use this field to limit the line/sub-lines that display on the Bid Item Detail Selection Screen with the cost information limits you set in this field. Key **Y** to display line/sub-lines without cost information. Key **N** to display line/sub-lines with cost information. **Default Value:** N (A 1) Required
Display zero price lines only	Use this field to limit the line/sub-lines that display on the Bid Item Detail Selection Screen with the price information limits you set in this field. Key **Y** to display line/sub-lines without price information. Key **N** to display line/sub-lines with price information. **Default Value:** N (A 1) Required
Display the lowest cost - sub-line for each line	Use this field to limit the sub-lines that display on the Bid Item Detail Selection Screen with those sub-lines with the lowest unit cost. This should be used when sub-lines for a particular line use the same or similar costing unit of measure. For example, Item A100 with a unit cost of $1.00 per EA is entered for line 0001.01. Item A110 with a unit cost of $1.10 per EA is entered for line 0001.02. If you set this field to Y to display the lowest cost, then line 0001.01 will display. Key **Y** to display sub-lines with the lowest unit cost. The **Display the lowest cost - sub-line for each line and Display the lowest price - sub-line for each line** filters cannot both be Y. Key **N** to display all sub-lines. **Note:** A unit of measure for one item does not ensure that the unit of measure defined for a different item will be the same. If this is the case, the lowest cost feature will not reflect the different quantity definitions for the units of measure for different items. **Default Value:** N (A 1) Required

Field/Function Key	Description
Display the lowest price - sub-line for each line	Use this field to limit the sub-lines that display on the Bid Item Detail Selection Screen with the lowest price of all sub-lines of a line. Key **Y** to display the lowest price of all sub-lines of a line. The **Display the lowest cost - sub-line for each line and display the lowest price - sub-line for each line** filters cannot both be Y. Key **N** to display all sub-lines. (A 1) Required
F2=Clear Limits	Press **F2=CLEAR LIMITS** to clear all previously set limits. This screen will redisplay and all limits will default to their system values.
F12=Return	Press **F12=RETURN** to return to the Bid Item Detail Selection Screen without updating this screen.
Enter	Press **ENTER** to confirm your selections. Your changes will be updated and the Bid Item Detail Selection Screen will display according to the filters you entered on this screen.

Bid Item Detail Display Screen



This screen displays after you enter the reference number of a bid line item in the Selection field on the Bid Item Detail Selection Screen, and press **ENTER**. Use this screen to review information for a bid line item of the selected bid.

All the fields on this screen are display only and cannot be changed.

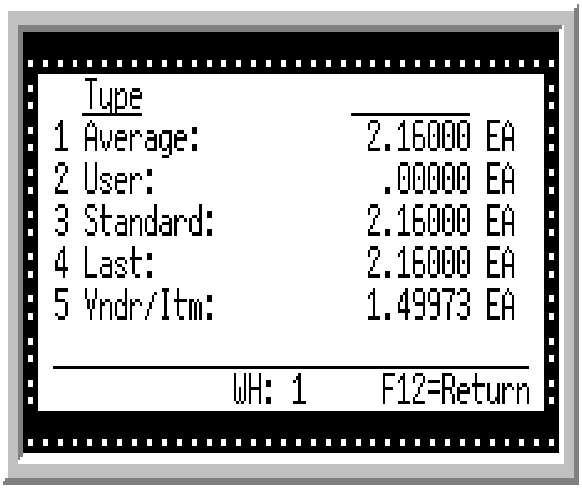
Bid Item Detail Display Screen Fields and Function Keys

Field/Function Key	Description
Bid	This field displays the bid number and corresponding bid description you selected on the Open/Closed Bid Inquiry Screen.
Line	This field displays the line/sub-line number for the line item.
Item	This field displays the item number for the line item.
Desc	This field displays the item description for the line item.
Qty	This field displays the item quantity and ordering unit of measure for the line item.
Vendor	This field displays the vendor number and vendor description of the vendor assigned to the line item.
Buyer	This field displays the buyer code and buyer description of the buyer assigned to the line item.
Mfg No	This field displays the manufacturer's item number for the line item.

Field/Function Key	Description
Cost / Cd / U/M	This field displays the rebate cost, rebate cost code, and costing unit of measure for the line item.
Cur	This field only displays when International Currency is installed. This field displays the company's local currency and trading currency of the vendor for cost, original cost, and commission cost of the item.
Orig / Cd	This field displays the original cost and original cost code for the line item.
Vendor Approval Code	This field displays whether the item is vendor approved, rejected, or pending (blank).
Price/U/M	This field displays the customer unit price and customer price unit of measure for the line item.
Cur	This field only displays when International Currency is installed. This field displays the local currency and trading currency for the customer price of the item.
Discount % / Cd	This field displays the customer price discount percent and customer discount percent code for the line item.
Qty Lmt	This field displays the customer quantity limit for the line item for the rebate values of this bid.
Customer Approval Code	This field displays whether the item is customer approved, rejected, or pending (blank).
Rsn	This field displays the lost reason code for this line item if the item has been rejected by the customer.
F5=Comments	Press **F5=COMMENTS** to display the Display Line Item Comments Inquiry Screen.
F6=V/I Inq	Press **F6=V/I INQ** to display the Vendor/Item Information Inquiry Screen. Refer to the Infor Distribution A+ Purchasing User Guide (MENU POMAIN) for a detailed explanation of this screen.

Field/Function Key	Description
F9=Original Cost	Press **F9=ORIGINAL COST** to access Original Cost Inquiry Screen, which displays the available original costs for this line item. The costs may be any or all of the following: • the average cost defined for this item and warehouse through Item Balance Maintenance (MENU IAFILE) • the standard cost defined for this item and warehouse through Item Balance Maintenance (MENU IAFILE) • the last cost defined for this item and warehouse through Item Balance Maintenance (MENU IAFILE) • the user cost defined for this item and warehouse through Item Balance Maintenance (MENU IAFILE) • The vendor/item cost defined for this vendor and item through Vendor/ Item Information Maintenance (MENU POFILE)
F12=Return	Press **F12=RETURN** to return to the Bid Item Detail Selection Screen.
F22=Itm Inq	Press **F22=ITM INQ** to display the Item Inquiry Screen. Refer to the **Error! Filename not specified.**Bid Item Detail Display Screen Inventory Accounting User Guide (MENU IAMAIN) for a detailed explanation of this screen.

Original Cost Inquiry Screen



This screen appears after pressing the **F9=ORIGINAL COST** key on the Bid Item Detail Display Screen. Use this window to review the Average, User, Standard, or Last cost of the item.

All the fields on this screen are display only and cannot be changed.

Original Cost Screen Fields and Function Keys

Field/Function Key	Description
Type	The following four costs display for the item: Average, User, Standard, Last. For information on how these costs are defined and maintained, refer to the Item Balance Maintenance option (MENU IAFILE) in the Inventory Accounting User Guide. The fifth cost is the vendor/item cost for the item, to the Vendor/Item Maintenance option (MENU POFILE) in the Purchasing User Guide for more information. Display
Sel	Use this field to select the cost you want to use for the item for this bid. The code of the cost you select will appear in the Orig/Cd field on the Bid Item Detail Display Screen. • Key **1** to select the item's Average cost. • Key **2** to select the item's User cost. • Key **3** to select the item's Standard cost. • Key **4** to select the item's Last cost. Display

Field/Function Key	Description
WH	This field displays the warehouse where this item is stocked and where the costs are tracked based on the default warehouse for the user as defined through Item Balance Maintenance (MENU IAFILE). Display
F12=Return	Press **F12=RETURN** to return to the Bid Item Detail Display Screen without selecting an original cost code.

Chapter 6 Printing Vendor RFQs

You can print requests for quotes to a specific vendor on a bid or all vendors associated with a bid through Print Vendor RFQ's (MENU BQMAIN). Once a bid is created and items have been entered through Enter, Change, Delete Bids (MENU BQMAIN), this option allows you to send a request for price quotes to vendors. You can then use the price quotes received from vendors for the items on the bid to develop your quote to your customer.

Additionally, if the Fax module is installed on your system, you have the option of printing or faxing the Vendor RFQ, depending on your selections in the B&Q Vendor RFQ fields in Vendor Master Maintenance (MENU POFILE).

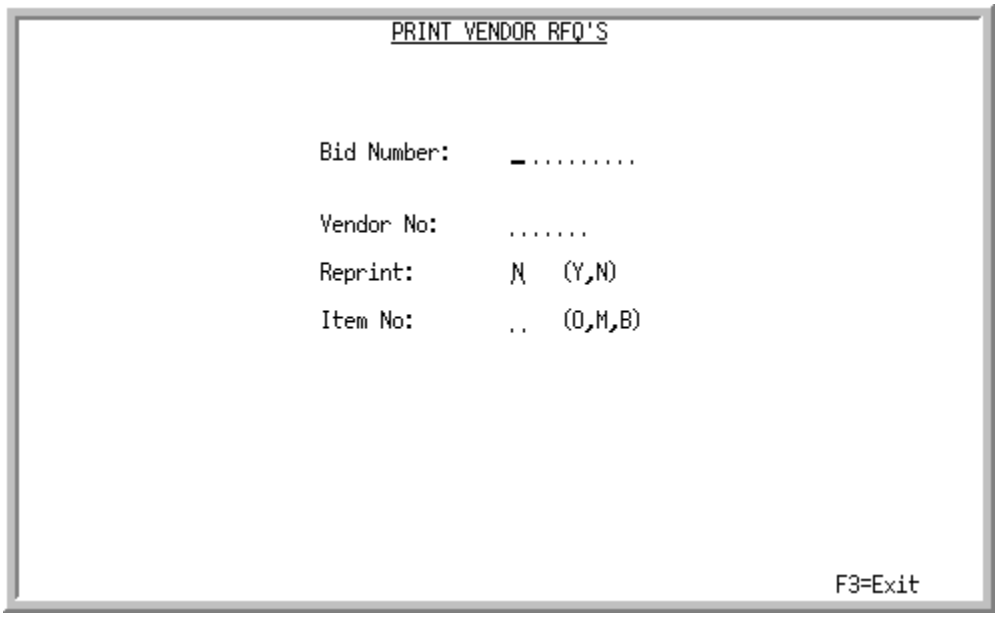
If Mail Server is installed and the Email Vendor RFQ field is set to Y through Vendor Master Maintenance (MENU POFILE), you can e-mail the Vendor RFQ in addition to printing or faxing it.

Print Vendor RFQ's

The screens and/or reports in Print Vendor RFQ's and a brief description of their purpose are listed in the following table. A complete description of each is provided in this section.

Title	Purpose
Print Vendor RFQ's Screen	Used to enter a bid number and vendor number.
Vendor RFQ	Contains a request for a quote from a vendor.

Print Vendor RFQ's Screen



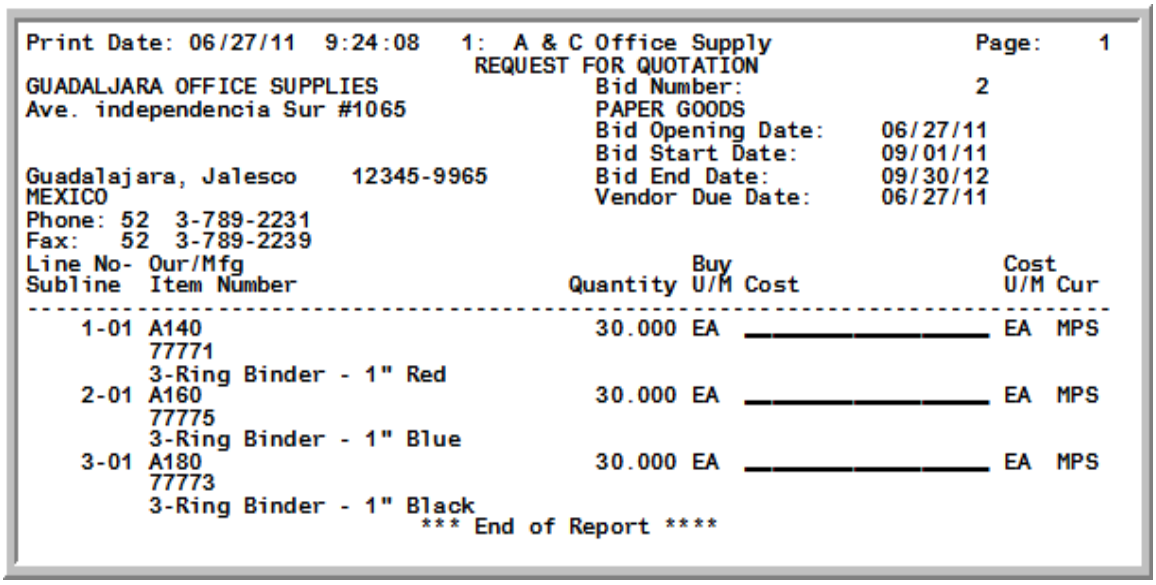
This screen displays after selecting option **20** - Print Vendor RFQ's on MENU BQMAIN. Use this screen to enter the bid number and vendor for the Vendor RFQ you want to print/fax/e-mail. You have the option to print all vendors for a selected bid or a specific vendor. Additionally, you have the option to reprint a Vendor RFQ that has previously been printed. This screen also displays when you press **F5=P/F VND RFQ** on the Open/Closed Bid Inquiry Screen.

Print Vendor RFQ's Screen Fields and Function Keys

Field/Function Key	Description
Reprint	Use this field to specify whether this is a reprint or not. If the Vendor No field is left blank and the Reprint field is set to **N**, all vendors for the selected bid will print provided they have not already been printed. If the Vendor No field is keyed and the Reprint field is set to **N**, then only the selected vendor will print provided it has not already been printed. If the Reprint field is **Y**, then the Bid Number field must be keyed. The Vendor RFQ will print for the bid/ vendor number even it has previously been printed. Key **Y** if this Vendor RFQ is a reprint. Key **N** if this Vendor RFQ is not a reprint. **Default Value:** N (A 1) Required

Field/Function Key	Description
Item No	Use this field to specify whether or not you want to print our item number, the manufacturer's item number, or both item numbers on this Vendor RFQ. Key **O** to print our item number on this RFQ. Key **M** to print the manufacturer's item number on this RFQ. Key **B** to print both our item number and the manufacturer's item number on this RFQ. (A 1) Required
F3=Exit	Press the **F3=EXIT** function key to exit this option. MENU BQMAIN will display and the Vendor RFQ printing is cancelled.
Enter	Press **ENTER** to confirm your selections. The Report Options Screen will display. The Vendor RFQ will print following your responses on this screen. Refer to the Infor Distribution A+ Cross Applications User Guide for a detailed explanation of the Report Options Screen.

Vendor RFQ



```
Print Date: 06/27/11  9:24:08   1:  A & C Office Supply                Page:    1
                                REQUEST FOR QUOTATION
GUADALJARA OFFICE SUPPLIES                Bid Number:                  2
Ave. independencia Sur #1065              PAPER GOODS
                                          Bid Opening Date:    06/27/11
                                          Bid Start Date:      09/01/11
Guadalajara, Jalesco    12345-9965        Bid End Date:        09/30/12
MEXICO                                    Vendor Due Date:     06/27/11
Phone: 52  3-789-2231
Fax:   52  3-789-2239
Line No- Our/Mfg                                  Buy                    Cost
Subline  Item Number                    Quantity U/M Cost                U/M Cur
-------------------------------------------------------------------------------
    1-01 A140                            30.000 EA  _________________ EA  MPS
         77771
         3-Ring Binder - 1" Red
    2-01 A160                            30.000 EA  _________________ EA  MPS
         77775
         3-Ring Binder - 1" Blue
    3-01 A180                            30.000 EA  _________________ EA  MPS
         77773
         3-Ring Binder - 1" Black
                      *** End of Report ****
```

Vendor RFQs will print using Form Type **1** or Form Type **2**, depending on your selection in System Options Maintenance (MENU XAFILE).

This document prints a request for a quote from the specified vendor for the vendor/item(s) associated with this bid. If a specific vendor was entered in the Vendor field on the Print Vendor RFQ's Screen, a Vendor RFQ will print with the item(s) associated with that vendor entered through Enter, Change, Delete Bids (MENU BQMAIN). If the Vendor field on the Print Vendor RFQ's Screen is left blank to print all vendors associated with the selected bid, then multiple Vendor RFQ's will print (one for each vendor on the bid).

Note: The dates will print in the Date Format for the vendor's country as specified through Country Names Maintenance (MENU POFILE/MENU ARFIL2), or if that field is blank, the dates print using the system's Default Date Format specified through System Options Maintenance (MENU XAFILE).

Vendor RFQ

Field/Function Key	Description
Headings	Program run date and time, the company number and name, and the page number are printed.
** Reprint **	This field represents whether or not this document is a reprint or not. If this displays ***** Reprint ***** above the customer name, then this Vendor RFQ is a reprint. If this is blank, this Vendor RFQ is not a reprint.
(Vendor Information)	This field represents the vendor name and address including the zip/ postal code and country.

Field/Function Key	Description
Phone	This field represents the vendor telephone number, including the country access code and extension.
Fax	This field represents the vendor fax number, including the country access code and extension.
Bid Number	This field represents the selected bid this Vendor RFQ was printed/faxed for.
(Bid Description)	This field represents the description of the selected bid.
Bid Opening Date	This field represents the opening date to accept quotes for the selected bid.
Bid Start Date	This field represents the start date for the selected bid.
Bid End Date	This field represents the expiration date for the selected bid. Vendor Due Date This field represents the date the bid is due back from the vendor.
WH	The WH field only displays when a Warehouse was selected on the Bid & Quote Header Screen. This field represents the purchasing warehouse number and name associated with the items on this bid.
Line No/Subline	This field represents the line/sub-line of the item on the selected bid.
Our/Mfg Item Number	This field prints our item number, the manufacturer's item number or both based on your choice for the Item No field on the Print Vendor RFQ's Screen for the item displayed followed by the item description.
Quantity	This field represents the quantity of this item for the selected bid.
Buy U/M	This field represents the buying unit of measure of the item.
Cost	This field represents the unit cost of the item for this bid.
Cost U/M	This field represents the costing unit of measure for the item.
Cur	When International Currency is installed, this field represent the currency code for the vendor's cost.

Chapter 7 Printing Customer Quotes

You can print customer quotes for a selected bid through Print Customer Quotes (MENU BQMAIN). Once a bid is created, items have been entered for vendors to quote and the vendors have returned quotes, use this option to send a Customer Quote to the customer who originally requested the quote.

Additionally, if the Fax module is installed on your system, you have the option to print a Customer Quote or to fax each Customer Quote, depending upon your selections in the B&Q Customer Quote fields in Customer Master Maintenance (MENU ARFILE).

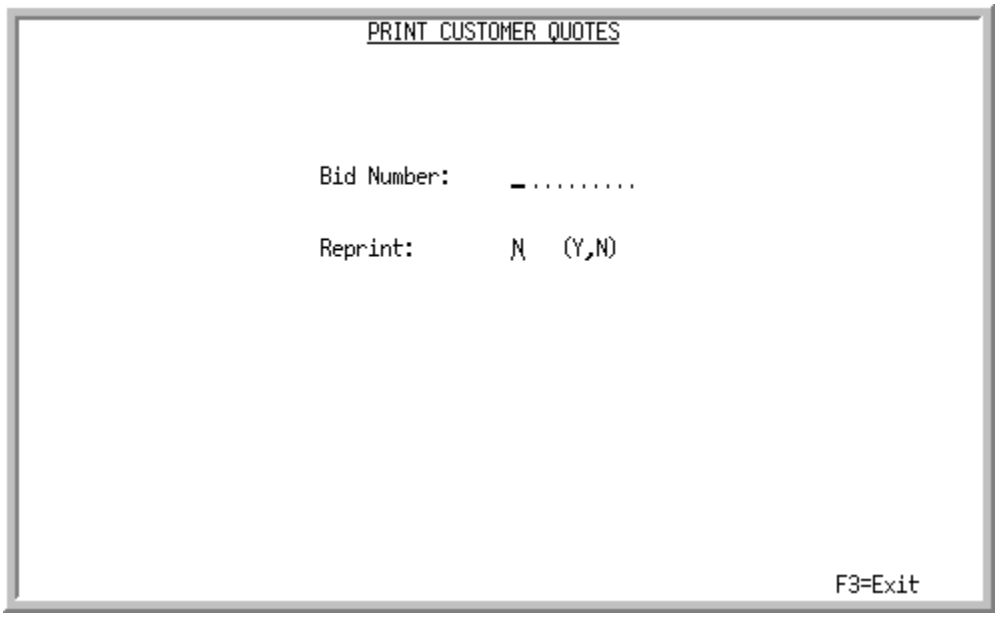
If Mail Server is installed and the Email B&Q Customer Quote field is set to Y through Customer/Ship to Master Maintenance (MENU ARFILE), you can e-mail the Customer Quote in addition to printing or faxing it.

Print Customer Quotes

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
Print Customer Quotes Screen	Used to print quotes.
Customer Quote	Contains a customer quote.

Print Customer Quotes Screen



This screen displays after selecting option 21 - Print Customer Quotes on MENU BQMAIN. This screen also displays when you press **F5=P/F QUOTE** on the Open/Closed Bid Inquiry Screen.

Use this screen to enter the bid number for the customer quote you want to print/fax/e-mail. All line/sub-lines of the bid that are marked with a vendor approval code of Y through Enter, Change, Delete Bids (MENU BQMAIN) will print on this document.

If FAX is being used, the default fax country code and fax number that will be used for the B&Q Customer Quote will be the PO Fax Country Code and PO Fax Number assigned through Customer/Ship to Master Maintenance (MENU ARFILE). If a PO Fax Number does not exist for this customer, the Default Fax Number will be used.

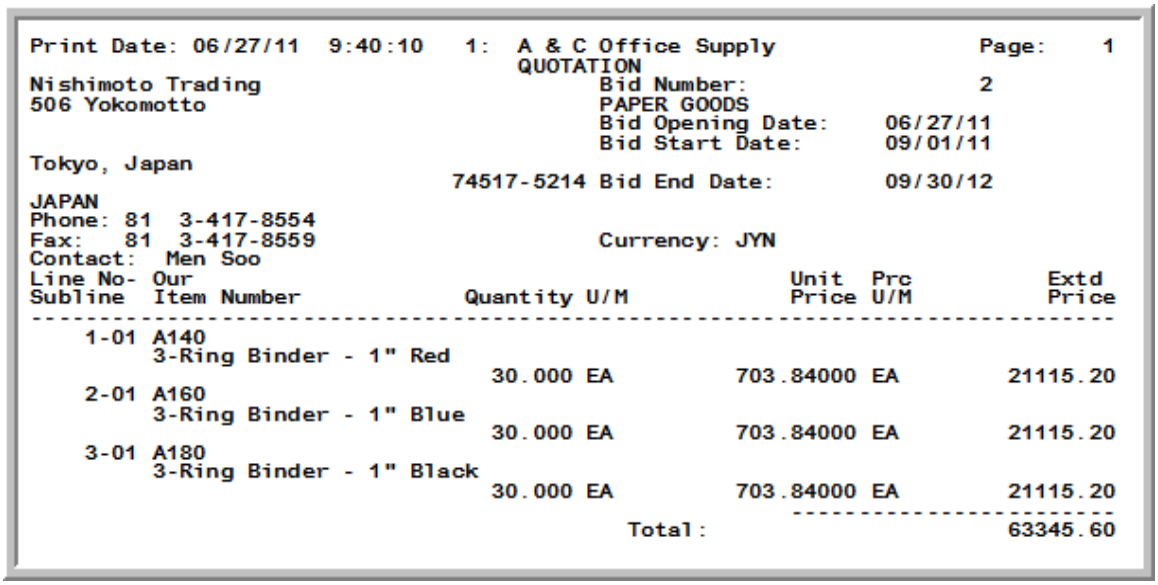
The default email address that will be used when e-mailing the B&Q Customer Quote will be the Purchasing Email Address assigned through Customer/Ship to Master Maintenance (MENU ARFILE). If a Purchasing Email Address does not exist for this customer, the Default Email Address will be used.

Print Customer Quotes Screen Fields and Function Keys

Field/Function Key	Description
Bid Number	Use this field to enter the bid number code of the bid for which you want to print a Customer Quote. Key the appropriate bid number. **Valid Values:** A valid bid number entered through Enter, Change, Delete Bids (MENU BQMAIN). (A 10) Required

Field/Function Key	Description
Reprint	Use this field to specify whether or not this is a reprint. Key Y if this Customer Quote is a reprint. Key N if this Customer Quote is not a reprint. **Default Value:** N (A 1) Required
F3=Exit	Press the **F3=EXIT** function key to exit this option. MENU BQMAIN will display and the printing of the Customer Quote will be canceled.
Enter	Press **ENTER** to confirm your selection. The Report Options Screen will display and the Customer Quote will print following your selections on this screen. Refer to the Infor Distribution A+ Cross Applications User Guide for a detailed explanation of the Report Options Screen.

Customer Quote



```
Print Date: 06/27/11  9:40:10   1:  A & C Office Supply                Page:    1
                                    QUOTATION
Nishimoto Trading                         Bid Number:                    2
506 Yokomotto                             PAPER GOODS
                                          Bid Opening Date:     06/27/11
                                          Bid Start Date:       09/01/11
Tokyo, Japan
                                74517-5214 Bid End Date:        09/30/12
JAPAN
Phone: 81  3-417-8554
Fax:   81  3-417-8559                     Currency: JYN
Contact:  Men Soo
Line No- Our                                                Unit  Prc          Extd
Subline  Item Number              Quantity U/M              Price U/M          Price
-------------------------------------------------------------------------------------
    1-01 A140
         3-Ring Binder - 1" Red
                                  30.000 EA          703.84000 EA         21115.20
    2-01 A160
         3-Ring Binder - 1" Blue
                                  30.000 EA          703.84000 EA         21115.20
    3-01 A180
         3-Ring Binder - 1" Black
                                  30.000 EA          703.84000 EA         21115.20
                                                                    ---------------
                                             Total:                        63345.60
```

This Customer Quote prints after entering your selections on both the Print Customer Quotes Screen and the Report Options Screen. Refer to the Infor Distribution A+ Cross Applications User Guide for a detailed explanation of the Report Options Screen.

Customer Quotes will print using Form Type **1** or Form Type **2**, depending on your selection in System Options Maintenance (MENU XAFILE).

This document prints a customer quote for the request for quotes returned from those vendors participating in the selected bid. All line/sub-lines for which a Vendor Approval Code of **Y** has been entered through Enter, Change, Delete Bids (MENU BQMAIN) will print on this document.

Note: The dates will print in the Date Format for the customer's country as specified through Country Names Maintenance (MENU ARFIL2/MENU POFILE), or if that field is blank, the dates print using the system's Default Date Format specified through System Options Maintenance (MENU XAFILE).

Customer Quotation

Field/Function Key	Description
Headings	Program run date and time, the company number and name, and the page number are printed.
** Reprint **	This field represents whether or not this document is a reprint or not. If this displays ***** Reprint ***** above the customer name, then this Customer Quote is a reprint. If this is blank, this Customer Quote is not a reprint.
(Customer Information)	This field represents the customer name and address including the zip/ postal code and country.

Field/Function Key	Description
Phone	This field represents the customer telephone number, including the country access code and extension.
Fax	This field represents the customer fax number, including the country access code and extension.
Contact	The customer's contact person for this bid from the Bid Header File (BQHED).
Bid Number	This field represents the selected bid this Customer Quote was printed/ faxed for.
(Bid Description)	This field represents the description of the selected bid.
Bid Opening Date	This field represents the opening date to accept quotes for the selected bid.
Bid Start Date	This field represents the start date for the selected bid.
Bid End Date	This field represents the expiration date for the selected bid.
WH	The **WH** field only displays when a Warehouse was selected on the Bid & Quote Header Screen. This field represents the purchasing warehouse number and name associated with the items on this bid.
Currency	When International Currency is installed, this field represent the currency code for the customer's price.
Line No/Subline	This field represents the line/sub-line of the item on the selected bid. (Item Number)This field prints our item number and description for the item displayed. QuantityThis field represents the quantity of this item for the selected bid.
U/M	This field represents the selling unit of measure of the item.
Unit Price	This field represents the unit price of the item for this bid.
Prc U/M	This field represents the pricing unit of measure for the item.
Extd Price	This field represent the extended price for the item.
Total	This field is the total of the extended price amounts for all the items on the bid for this customer.

Chapter 8 Printing the Bid/Quote Worksheet

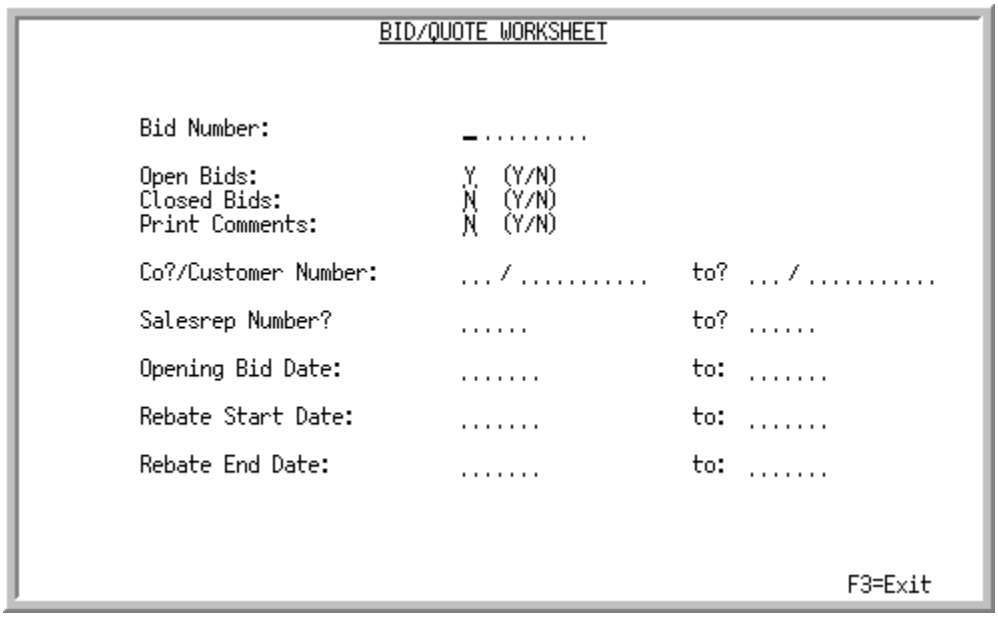
You can print the Bid/Quote Worksheet Report through Bid/Quote Worksheet (MENU BQREPT). This worksheet prints all information on file for each bid selected. If more than one vendor has been asked to provide a quote for an item, information is included for each vendor quote requested. The bids printed on the worksheet are selected based on the criteria you enter on the Bid/Quote Worksheet Selection Screen.

Bid/Quote Worksheet Report

The screens and/or worksheets and a brief description of their purpose are listed in the following table. A complete description of each is provided in this section.

Title	Purpose
Bid/Quote Worksheet Selection Screen	Used to select bids to print on the Bid/Quote Worksheet.
Bid/Quote Worksheet Report	Contains bid information.

Bid/Quote Worksheet Selection Screen



This screen displays after selecting option 1 - Bid/Quote Worksheet Report from MENU BQREPT. Use the selection criteria on this screen to select the bids for which you want to print the Bid/Quote Worksheet Report. You may also select whether or not you want bid comments to print on the worksheet.

The criteria you enter in the following From and To fields determine which bids will print on the worksheet; only those bids that match the criteria entered will print.

Refer to the Infor Distribution A+ Cross Applications User Guide for an explanation of the rules for entering From/To Ranges.

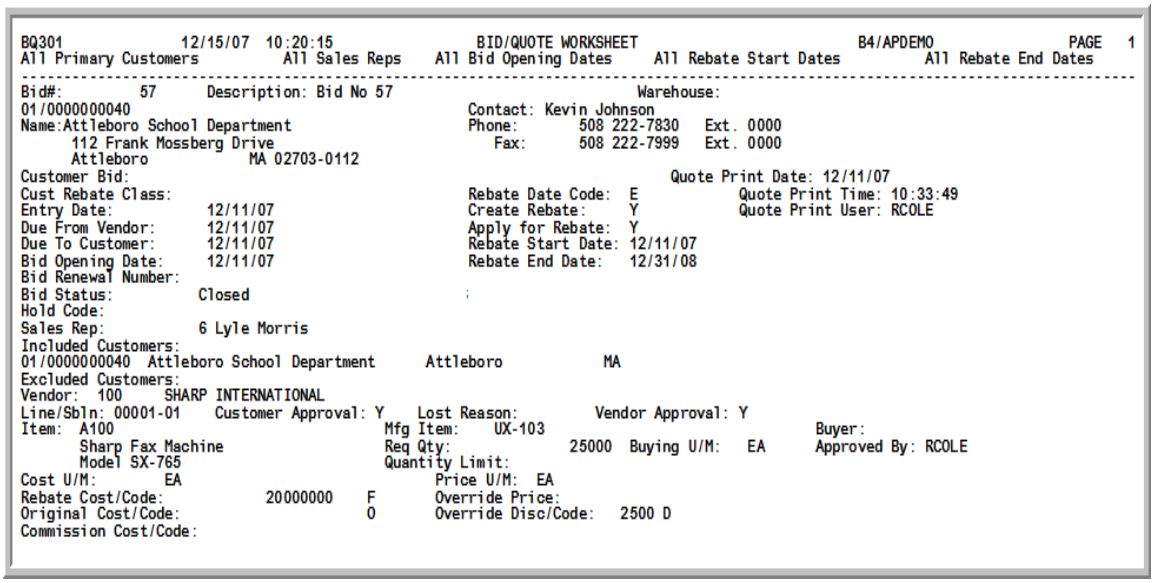
Bid/Quote Worksheet Selection Screen Fields

Field/Function Key	Description
Bid Number	This field allows you to print the worksheet for a specific bid. Key the appropriate bid number. Leave this field blank if you do not want to print the worksheet for a specific bid. All bids that meet the selection criteria you enter in other fields will print. (A 10) Optional

Field/Function Key	Description
Open Bids	This field determines whether or not information from open bids will print on the worksheet. Key **Y** if you want information from open bids printed on the worksheet. Key **N** if you do not want information from open bids printed on the worksheet. **Default Value:** N (A 1) Required
Closed Bids	This field determines whether or not information from closed bids will print on the Bid/Quote Worksheet Report. Key **Y** if you want information from closed bids printed on the worksheet. Key **N** if you do not want information from closed bids printed on the worksheet. **Default Value:** N (A 1) Required
Print Comments	This field determines whether or not the comments on file with each bid will print on the Bid/Quote Worksheet Report. Key **Y** if you want the comments printed on the worksheet. Key **N** if you do not want the comments printed on the worksheet. **Default Value:** N (A 1) Required
Co/Customer Number	The Co field is display only if the **Multi Company** field is set to N through System Options Maintenance (MENU XAFILE). Key the company number and/or co/customer number for which you want to limit the bids on the worksheet. Company numbers are defined through Company Name Maintenance (MENU XAFILE). Customers are defined through Customer/Ship to Master Maintenance (MENU ARFILE). (2 @ N 2,0/N 10,0) Optional
Salesrep Number	This field appears only if the **Multi Company** field is set to **Y** through System Options Maintenance (MENU XAFILE). Key the number of the sales representative for which you want to limit bids on the worksheet. Sales representative numbers are defined through Sales Representative Maintenance (MENU SAFILE). **Note:** An entry in the Salesrep Number field is not allowed without an entry in the Co/Customer Number field. (2 @ N 5,0) Optional

Field/Function Key	Description
Opening Bid Date	Key the date or range of dates that a bid is to be open to participating vendors. The bid opening date is entered through Enter, Change, Delete Bids (MENU BQMAIN). **Valid Values:** Key the date using the Default Date Format for this user, specified through Register A+ User IDs (MENU XACFIG). If that field is blank, key the date using the system's Default Date Format specified through System Options Maintenance (MENU XAFILE). (2 @ N 6,0) Optional
Rebate Start Date	Key the date or range of dates that is the earliest date the rebate will be applied to items ordered under this bid. Rebate start dates are entered through Enter, Change, Delete Bids (MENU BQMAIN). **Valid Values:** Key the date using the Default Date Format for this user, specified through Register A+ User IDs (MENU XACFIG). If that field is blank, key the date using the system's Default Date Format specified through System Options Maintenance (MENU XAFILE). (2 @ N 6,0) Optional
Rebate End Date	Key the date or range of dates that is the last date the rebate will be applied to items ordered under this bid. Rebate end dates are entered through Enter, Change, Delete Bids (MENU BQMAIN). **Valid Values:** Key the date using the Default Date Format for this user, specified through Register A+ User IDs (MENU XACFIG). If that field is blank, key the date using the system's Default Date Format specified through System Options Maintenance (MENU XAFILE). (2 @ N 6,0) Optional
F3=Exit	Press the **F3=EXIT** function key to cancel this option and not print a report. MENU BQREPT will display.
Enter	Press **ENTER** to confirm your selection(s). The Report Options Screen will display. Refer to the Infor Distribution A+ Cross Applications User Guide for details about this screen. Following this screen, the Bid/Quote Worksheet Report will print.

Bid/Quote Worksheet Report



```
BQ301            12/15/07  10:20:15              BID/QUOTE WORKSHEET                          B4/APDEMO                PAGE   1
All Primary Customers         All Sales Reps    All Bid Opening Dates     All Rebate Start Dates         All Rebate End Dates
-------------------------------------------------------------------------------------------------------------------------------
Bid#:          57      Description: Bid No 57                          Warehouse:
01/0000000040                                        Contact: Kevin Johnson
Name:Attleboro School Department                     Phone:       508 222-7830   Ext. 0000
      112 Frank Mossberg Drive                          Fax:       508 222-7999   Ext. 0000
      Attleboro            MA 02703-0112
Customer Bid:                                                    Quote Print Date: 12/11/07
Cust Rebate Class:                                   Rebate Date Code:  E          Quote Print Time: 10:33:49
Entry Date:            12/11/07                      Create Rebate:     Y          Quote Print User: RCOLE
Due From Vendor:       12/11/07                      Apply for Rebate:  Y
Due To Customer:       12/11/07                      Rebate Start Date: 12/11/07
Bid Opening Date:      12/11/07                      Rebate End Date:   12/31/08
Bid Renewal Number:
Bid Status:          Closed                          ;
Hold Code:
Sales Rep:           6 Lyle Morris
Included Customers:
01/0000000040  Attleboro School Department      Attleboro           MA
Excluded Customers:
Vendor:  100     SHARP INTERNATIONAL
Line/Sbln: 00001-01    Customer Approval: Y    Lost Reason:         Vendor Approval: Y
Item:  A100                                  Mfg Item:    UX-103                          Buyer:
       Sharp Fax Machine                     Req Qty:             25000  Buying U/M:   EA      Approved By: RCOLE
       Model SX-765                          Quantity Limit:
Cost U/M:        EA                                Price U/M:  EA
Rebate Cost/Code:            20000000    F        Override Price:
Original Cost/Code:                      0        Override Disc/Code:   2500 D
Commission Cost/Code:
```

This worksheet prints after pressing **ENTER** on the Report Options Screen.

This worksheet prints all the information on file for each bid selected. Bids are selected for printing based on the criteria you entered on the Bid/Quote Worksheet Selection Screen.

Bid/Quote Worksheet

Field/Function Key	Description
(Header Information)	Program names appear on the upper left corner of the report followed by run date and time, report title, workstation ID, User ID, and page number. Summary of the selection criteria prints in the center of the headings area followed by the individual field headings.
Bid#	This field prints the bid number for this bid.
Description	This field prints the description of the bid.
Warehouse	This field prints the warehouse for which rebates will be valid for this bid. If no warehouse number is shown, rebates will be valid for all warehouses.
(Co/Customer)	The primary company and customer name and address including the zip/ postal code and country.
Contact	This field prints the name of the contact person for the primary customer requesting the bid.

Field/Function Key	Description
Name	This field prints the name and address of the primary customer requesting the bid.
Phone	This field prints the phone number, including the country access code and extension, of the contact person for the primary customer requesting the bid.
Fax	This field prints the fax number, including the country access code and extension, of the contact person for the customer requesting the bid.
Customer Bid	This field prints the bid number that the customer assigned to the bid.
Cust Rebate Class	This field prints the customer rebate class for which the rebate for the bid is to be applied. Customer rebate classes are created through Customer Rebate Classes Maintenance (MENU OEREBT).
Entry Date	This field prints the date the bid was created.
Due From Vendor	This field prints the date by which all quotes on items for this bid must be received from vendors.
Due To Customer	This field prints the date by which your quotation must be submitted to the customer.
Bid Opening Date	This field prints the first date that the bid is to be open to participating vendors.
Bid Renewal Number	This field prints the bid number of a previous bid for which the bid shown has the same information. This field is used to show that the bid being processed is an extension or renewal of a previous bid.
Bid Status	This field prints the current status of this bid. The status may be any of the following: • **Rdy to Prt Vendor RFQ** • **Vendor RFQ Printed** • **Rdy to Prt Quote** • **Customer Quote Printed** • **Customer Appvd/Reject** • **Held**
Hold Code	If the **Bid Status** is **Held**, this field prints the hold code that describes the reason for the hold. Hold codes are defined through Order Hold Codes Maintenance (MENU OEFILE).

Field/Function Key	Description
Sales Rep	This field prints the sales representative number and the name of the primary sales representative associated with the customer requesting this bid.
Included Customers	This field prints the customers that will be included in the rebate for this bid. For each customer, the worksheet prints the company number, customer number, customer name, city, and state.
Excluded Customers	This field prints the customers that will be excluded from the rebate for this bid. For each customer, the worksheet prints the company number, customer number, customer name, city, and state.
Rebate Date Code	This field indicates whether or not the sales order entry date or the sales order requested ship date will be used when retrieving a rebate for the bid. An **E** in this field indicates the sales order entry date will be used; an R indicates that the sales order requested ship date will be used.
Create Rebate	This field indicates whether or not rebates for items on this bid will be created automatically when you close bids through Close Bids (MENU BQMAIN), when the Report Type is U (Update). A Y indicates that rebates will be created automatically; an N indicates that no rebates will be created.
Apply for Rebate	This field indicates whether or not reimbursement for the rebate for the bid is to be requested from the vendor, or if the rebate has already been incorporated into the cost of the item(s). A Y indicates that the rebate has not been incorporated into the cost of the item(s) and a request to the vendor is needed for reimbursement of the rebate. An N indicates that the rebate has been incorporated into the cost of the item(s) and no request for reimbursement is needed.
Rebate Start Date	This field prints the earliest date the rebate to the customer will be applied to items ordered under this bid. Rebate start dates are entered through Enter, Change, Delete Bids (MENU BQMAIN).
Rebate End Date	This field prints the last date the rebate to the customer will be applied to items ordered under this bid. Rebate end dates are entered through Enter, Change, Delete Bids (MENU BQMAIN).
Quote Print Date	This field prints the date on which a quote to the customer was printed for this bid.
Quote Print Time	This field prints the time at which a quote to the customer was printed for this bid.

Field/Function Key	Description
Quote Print User	This field prints the user id of the person who printed the quote to the customer in response to this bid.
Vendor	This field prints the number and name of the vendor who has been requested to provide a quote for this item for this bid.
Line/Sbln	This field prints the line number and sub-line number of the item for this vendor on this bid.
Item	This field prints the item number and description. **Note:** When entering a bid through Enter, Change, Delete Bids (MENU BQMAIN), you may add an item that is not currently in the Item Master or Item Balance files for the purpose of requesting quotations from vendors. Items added this way do not have valid item numbers until they are added to the Item Master File through Item Master Maintenance (MENU IAFILE).
Cost U/M	This field prints the cost unit of measure for the item. Rebate, original, and commission costs are all expressed in this unit of measure.
Rebate Cost/Code	This field prints the rebate cost and rebate cost code for this item from this vendor. The rebate cost code determines how the rebate amount shown in the Rebate Cost field is used to determine the final cost of the item. The rebate cost code may be any of the following: • **F** - Fixed. The rebate amount shown is the actual rebate cost of the item. • **$** - Dollar amount. The rebate amount shown is subtracted from the original cost of the item to determine the rebate cost. • **%** - Percent. The rebate amount shown is the percentage amount taken off the original cost to determine the rebate cost.

Field/Function Key	Description
Original Cost/Code	This field prints the original cost and original cost code for this item from this vendor. If the original cost code is F (fixed), the dollar amount shown is the original cost for the item. The rebate cost is based on this cost. If the original cost code is V, O, A, U, S, or L, the cost used as the original cost is taken from existing information as follows, and no dollar amount is entered. Additionally, the original cost can then be used to calculate the appropriate rebate for this item and vendor, as follows: • **V** - The original cost will be the vendor/item cost as defined for this vendor and item through Vendor/Item Information Maintenance (MENU POFILE). • **O** - The original cost for this item is the cost from the order (as specified through the Cost to be Used for GL field on the Price Settings Screen in Order Entry Options Maintenance (MENU XAFILE)). • **A** - The original cost for this item is the average cost as defined for the item and warehouse through Item Balance Maintenance (MENU IAFILE). • **U** - The original cost for this item is the user cost defined for the item and warehouse through Item Balance Maintenance (MENU IAFILE). • **S** - The original cost for this item is the standard cost defined for the item and warehouse through Item Balance Maintenance (MENU IAFILE). • **L** - The original cost for this item is the last cost defined for the item and warehouse through Item Balance Maintenance (MENU IAFILE).

Field/Function Key	Description
Commission Cost/Code	This field prints the commission cost and commission cost code for this item from this vendor. The Commission Cost field is the cost that will be used for the purpose of tracking sales representatives' commissions. The Commission Cost Code field determines how the amount shown in the Commission Cost field is used to determine the final commission cost of the item. The Commission Cost Code field may be any of the following: • **F** - Fixed. The amount shown is the final commission cost of the item. • **$** - Dollar amount. The amount shown is subtracted from the normal commission cost of the item to determine the final commission cost. • **%** - Percent. The amount shown is the percentage amount taken off the normal commission cost to determine the final commission cost of the item.
Customer Approval	This field prints the customer approval code for this line/sub-line. A Y indicates that the customer has approved the purchase of this item; an N indicates that the customer has rejected this item. If this field is blank, customer approval of your quote for the item is still pending; your quote has neither been approved nor rejected.
Lost Reason	If the Customer Approval field is N, this code indicates the reason the item was rejected by the customer. If the Customer Approval field is Y or blank, this field will be blank.
Vendor Approval	This field prints the vendor approval code for this line/sub-line. A Y indicates that this vendor's quote for the item has been accepted and will be used in your customer quote. An N indicates that this vendor's quote for the item has been rejected and will not be used in your customer quote. If this field is blank, approval of the vendor's quote for the item is still pending; the vendor's quote has neither been approved nor rejected.
Mfg Item	This field prints the manufacturer's item number for this item from this vendor.
Buyer	This field prints the buyer code and name of the buyer for this item and vendor.
Req Qty	This field prints the quantity of this item the customer has requested on this bid.
Buying U/M	This field prints the unit of measure in which you purchase this item from this vendor that relates to the customer's requested quantity.

Field/Function Key	Description
Approved By	This field prints the user ID of the person entering the vendor approval.
Quantity Limit	This field prints the total quantity of the item for which a rebate may be used for this item on this bid. When this quantity of the item has been ordered within the range specified by the rebate start and end dates, the vendor rebate will no longer be applied to the item's cost.
Price U/M	This field prints the pricing unit of measure for this item to the customer.
Override Price	This field shows the override of the final price of this item to the customer when the vendor rebate is in effect. The amount in this field is in the pricing unit of measure and will override any other pricing that has been set up for this customer/item, including any defined through contract pricing or defined for quantity discounts.
Override Disc/Code	This field prints the Override Discount Percent field and Override Discount Code field to be used for this item when the vendor rebate is in effect. This override takes precedence over any other pricing that has been set up for the customer/item, including any defined through contract pricing or defined for quantity discounts. The percentage shown for the Override Discount Percent field will be reduced from the base price of the item or added to the rebate cost to determine the new final price, depending on the Override Discount Code field. The Override Discount Code field may be any of the following: • **D** - Discount. The amount shown will be deducted from the base price of the item to calculate the item's final price. • **M** - Markup. The amount shown will be added to the rebate cost of the item to calculate the item's final price. • **G** - Gross margin. The amount shown will be added to the rebate cost of the item to calculate the item's final price.

Chapter 9 Printing the Bid Detail By Buyer/ Vendor/Item Report

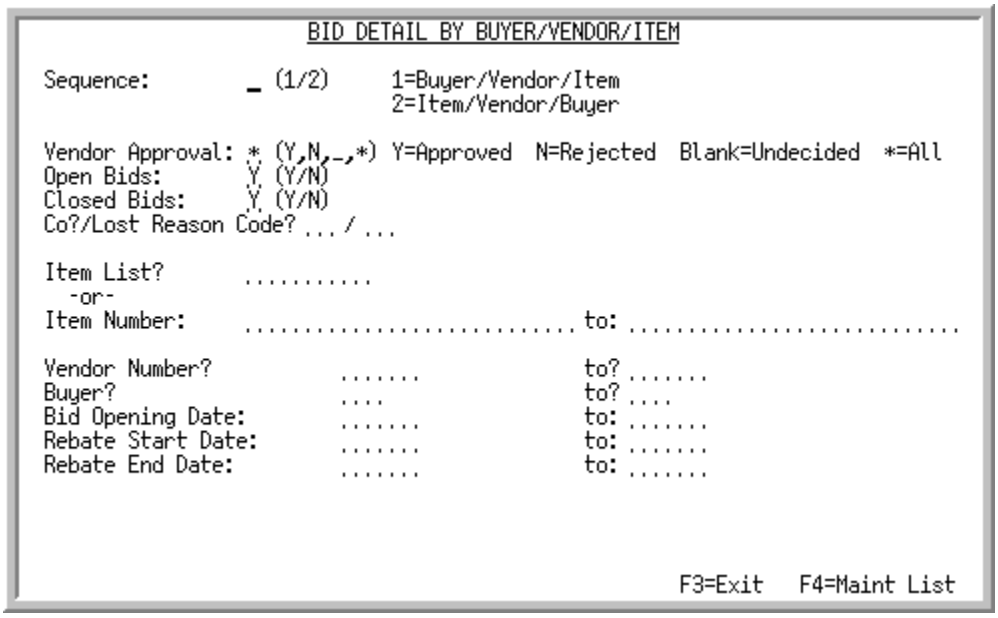
You can print the Bid Detail By Buyer/Vendor/Item Report and Bid Detail By Item/Vendor/ Buyer Report through Bid/Quote Detail By Buyer/Vendor/Item (MENU BQREPT). This report shows detailed cost and price information about individual items by buyer and item vendor. The report may be printed by buyer or by item number and may include information from either open or closed bids for items with any vendor status you select.

Bid/Quote Detail By Buyer/Vendor/Item Report

The screens and/or reports in this option and a brief description are listed in the following table. A complete description of each screen/report is contained in this section.

Title	Purpose
Bid Detail By Buyer/Vendor/Item Selection Screen	Used to select items to print on the Bid Detail By Buyer/ Vendor/Item Report.
Bid Detail By Buyer/Vendor/Item Report	Contains item information for an item.

Bid Detail By Buyer/Vendor/Item Selection Screen



This screen displays after selecting option **2** - Bid/Quote Detail By Buyer/Vendor/Item Report from MENU BQREPT. Use the selection criteria on this screen to select which items you want to print on the Bid Detail By Buyer/Vendor/Item Report.

Refer to the Infor Distribution A+ Cross Applications User Guide for an explanation of the rules for entering From/To Ranges.

Bid Detail By Buyer/Vendor/Item Selection Screen Fields and Function Keys

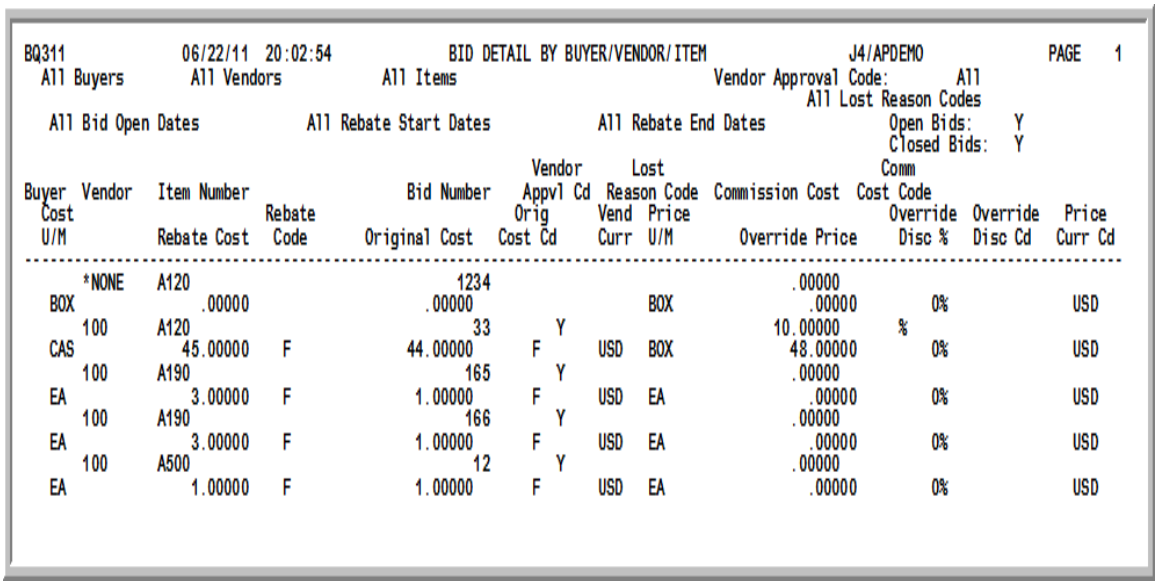
Field/Function Key	Description
Sequence	Use this field to identify the order in which you want the information on the report to print. Key **1** to print the report in buyer order. Items with the same buyer will be sorted by vendor number, and then by item number. Key **2** to print the report in item number order. Within each item number, the report will be sorted by vendor, and then by buyer. (N 1,0) Required

Field/Function Key	Description
Vendor Approval	This field limits the report to those items with the vendor approval code you enter in this field. Key **Y** to print items for which the vendor status is “Approved.” Items with a vendor approval code of Y have been approved for use in your customer quote. Key **N** to print items for which the vendor status is “Rejected.” Items with a vendor status of N will not be included in your customer quote. Leave this field blank to print a list of items for which vendor approval is still pending. These items have not yet been either approved or rejected. Key ***** to print all items, regardless of the vendor status of the item. **Default Value:** * (indicating all vendors) (A 1) Required
Open Bids	Use this field to select whether you want items from open bids to print on the report. Key **Y** if you want items from open bids to print. Key **N** if you do not want items from open bids to print. **Default Value:** Y (A 1) Required
Closed Bids	Use this field to select whether you want items from closed bids to print on the report. Key **Y** if you want items from closed bids to print. Key **N** if you do not want items from closed bids to print. **Default Value:** Y (A 1) Required
Co/Lost Reason Code	This field is display only if the Multi Company field is set to **N** through System Options Maintenance (MENU XAFILE). This field allows you to select a company and lost reason code for which you want items printed. Only items from bids with the company and lost reason code you enter will print on the report. Valid Values: • A company defined through Company Name Maintenance (MENU XAFILE). • A valid lost reason code defined through Order Delete Reason Codes (MENU OEFILE). (N 2,0 / A 2) Optional

Field/Function Key	Description
Item List	Key the identifier of a named item list to be used to select items for this report. number of an item list or individual item you want printed on the report. To create a temporary item list, press the **F4=MAINT LIST** function key. (A 10) Optional
Item Number	Key the number of an individual item or a range of items you want printed on the report. (2 @ A 27) Optional
Vendor Number	Key the vendor or range of vendors for whom you want to print item information. Vendor numbers are assigned through Vendor File Maintenance (MENU POFILE/MENU APFILE). (2 @ A 6) Optional
Buyer	Key the buyer for range of buyers or whom you want to print item information. Buyer codes are defined through Buyers Maintenance (MENU POFILE). Buyers may be assigned to a vendor (through MENU POFILE), vendor/warehouse (through MENU POFILE), vendor/item (through MENU POFILE), and/or vendor/item/warehouse (MENU POFILE). (2 @ A 3) Optional
Bid Opening Date	Key the bid opening date or range of bid opening dates that a bid must be open to participating vendors for items on the bid to be included on the report. The bid opening date is entered through Enter, Change, Delete Bids (MENU BQMAIN). **Valid Values:** Key the date using the Default Date Format for this user, specified through Register A+ User IDs (MENU XACFIG). If that field is blank, key the date using the **system's Default Date Format** specified through System Options Maintenance (MENU XAFILE). (N 6,0) Optional
Rebate Start Date	Key the rebate start date or range of rebate start dates that a bid must have for items from that bid to be included on the report. The rebate start date is the earliest date the rebate will be applied to items ordered under this bid. Rebate start dates are entered through Enter, Change, Delete Bids (MENU BQMAIN). **Valid Values:** Key the date using the Default Date Format for this user, specified through Register A+ User IDs (MENU XACFIG). If that field is blank, key the date using the system's Default Date Format specified through System Options Maintenance (MENU XAFILE). (N 6,0) Optional

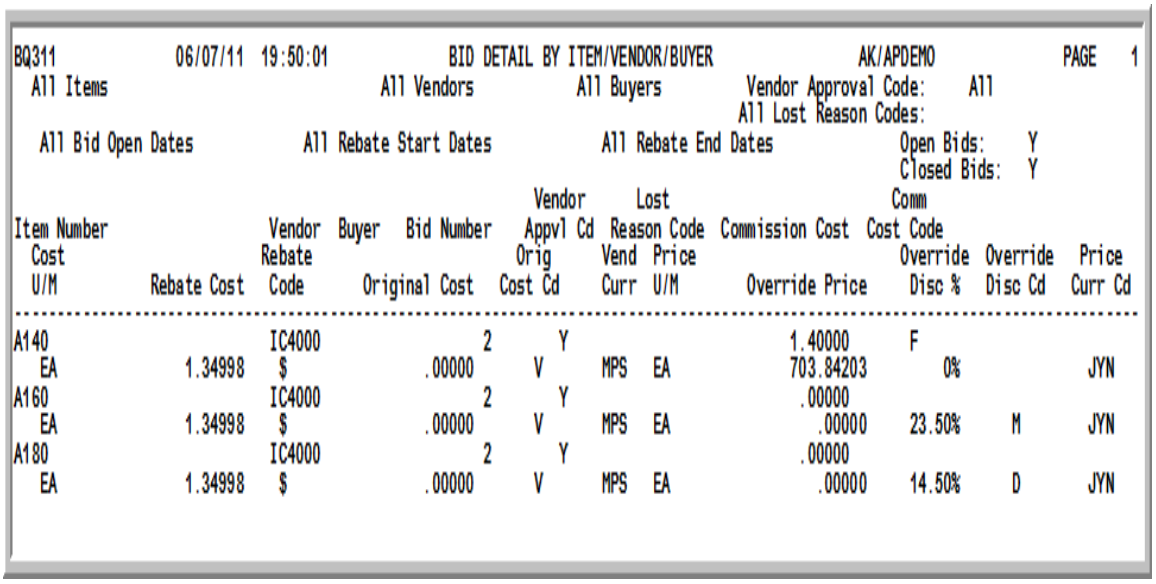
Field/Function Key	Description
Rebate End Date	Key the rebate end date or the range of rebate end dates that a bid must have for items on the bid to be included on the report. The rebate end date is the last date the rebate will be applied to items ordered under this bid. Rebate end dates are entered through Enter, Change, Delete Bids (MENU BQMAIN). **Valid Values:** Key the date using the Default Date Format for this user, specified through Register A+ User IDs (MENU XACFIG). If that field is blank, key the date using the system's Default Date Format specified through System Options Maintenance (MENU XAFILE). (N 6,0) Optional
F3=Exit	Press the **F3=EXIT** function key to cancel this option and not print a report. MENU BQREPT will display.
F4=Maint List	Press the **F4=MAINT LIST** function key to create or perform maintenance on item lists. The Item List Screen will display. Refer to the Appendix sections of the Infor Distribution A+ Cross Applications User Guide for a detailed explanation of this shared screen.
Enter	Press **ENTER** to confirm your selection(s). The Report Options Screen will display; refer to the Infor Distribution A+ Cross Applications User Guide for details about this screen. Following this screen, the Bid Detail By Buyer/Vendor/Item Report or the Bid Detail By Item/Vendor/Buyer Report will print.

Bid Detail By Buyer/Vendor/Item Report



```
BQ311            06/22/11  20:02:54          BID DETAIL BY BUYER/VENDOR/ITEM              J4/APDEMO              PAGE    1
  All Buyers       All Vendors          All Items                          Vendor Approval Code:       All
                                                                                      All Lost Reason Codes
   All Bid Open Dates          All Rebate Start Dates          All Rebate End Dates              Open Bids:     Y
                                                                                                 Closed Bids:   Y
                                                                    Vendor      Lost                          Comm
Buyer  Vendor   Item Number                                Bid Number   Appvl Cd  Reason Code  Commission Cost  Cost Code
  Cost                                Rebate                          Orig      Vend  Price                      Override  Override   Price
  U/M           Rebate Cost  Code      Original Cost   Cost Cd    Curr  U/M       Override Price    Disc %    Disc Cd   Curr Cd
-------------------------------------------------------------------------------------------------------------------------------
       *NONE    A120                                      1234                                      .00000
   BOX                .00000                          .00000                      BOX                .00000       0%              USD
       100      A120                                        33          Y                          10.00000       %
   CAS             45.00000    F                    44.00000       F    USD    BOX                 48.00000       0%              USD
       100      A190                                       165          Y                           .00000
   EA               3.00000    F                     1.00000       F    USD    EA                   .00000       0%              USD
       100      A190                                       166          Y                           .00000
   EA               3.00000    F                     1.00000       F    USD    EA                   .00000       0%              USD
       100      A500                                        12          Y                           .00000
   EA               1.00000    F                     1.00000       F    USD    EA                   .00000       0%              USD
```

Bid Detail By Item/Vendor/Buyer Report



```
BQ311            06/07/11  19:50:01          BID DETAIL BY ITEM/VENDOR/BUYER              AK/APDEMO              PAGE    1
  All Items                          All Vendors          All Buyers          Vendor Approval Code:       All
                                                                                      All Lost Reason Codes:
   All Bid Open Dates          All Rebate Start Dates          All Rebate End Dates              Open Bids:     Y
                                                                                                 Closed Bids:   Y
                                                                    Vendor      Lost                          Comm
Item Number                      Vendor  Buyer   Bid Number   Appvl Cd  Reason Code  Commission Cost  Cost Code
  Cost                           Rebate                          Orig      Vend  Price                      Override  Override   Price
  U/M           Rebate Cost      Code      Original Cost   Cost Cd    Curr  U/M       Override Price    Disc %    Disc Cd   Curr Cd
-------------------------------------------------------------------------------------------------------------------------------
A140                           IC4000                 2          Y                          1.40000       F
   EA               1.34998    $                .00000       V    MPS    EA                703.84203       0%              JYN
A160                           IC4000                 2          Y                           .00000
   EA               1.34998    $                .00000       V    MPS    EA                  .00000      23.50%     M        JYN
A180                           IC4000                 2          Y                           .00000
   EA               1.34998    $                .00000       V    MPS    EA                  .00000      14.50%     D        JYN
```

This report prints after pressing **ENTER** on the Report Options Screen. This report prints item information for each item that meets the selection criteria you entered on the Bid Detail By Buyer/ Vendor/Item Selection Screen.

Bid Detail By Buyer/Vendor/Item Report

Field/Function Key	Description
Headings	Program names appear on the upper left corner of the report followed by run date and time, report title, workstation ID, User ID, and page number. Summary of the selection criteria prints in the center of the headings area followed by the individual field headings.
Buyer	This field prints the buyer assigned to this item and vendor.
Vendor	This field prints the vendor for whom cost information is being shown on this line of the report.
Item Number	This field prints the item from this vendor. **Note:** When entering a bid through Enter, Change, Delete Bids (MENU BQMAIN), you may add an item that is not currently in the Item Master or Item Balance files, for the purpose of requesting quotations on that item from vendors. Items added this way do not have valid item numbers until they are added to the Item Master File through Item Master Maintenance (MENU IAFILE).
Bid Number	This field prints the bid from which the item information on this line of the report was taken.
Vendor Approval Code	This field indicates whether this vendor's quote for the item has been approved for use in your customer quote. A Y indicates that this item, from this vendor, has been approved for use in the customer quote. An N indicates that this item, from this vendor, has been rejected and will not be used in the customer quote. A blank indicates that no approval decision has yet been made on this item and vendor.
Lost Reason Code	For items that have been included in a bid and rejected for inclusion by the customer, this code indicates the reason the item was rejected. Lost reason codes are entered through Order Delete Reason Codes (MENU OEFILE).
Commission Cost	This field prints the cost for this item from this vendor that will be used for the purpose of tracking sales representatives' commissions. The Commission Cost Code field determines how the final commission cost of the item is calculated.

Field/Function Key	Description
Comm Cost Code	This field prints the commission cost code for this item from this vendor. The Commission Cost Code field determines how the amount shown in the Commission Cost field is used to determine the final commission cost of the item. The Commission Cost Code field may be any of the following: • **F** - Fixed. The amount shown is the actual commission cost of the item. • **$** - Dollar amount. The amount shown is subtracted from the normal commission cost of the item to determine the final commission cost. • **%** - Percent. The amount shown is the percentage amount taken off the normal commission cost to determine the final commission cost of the item.
Cost U/M	This field prints the cost unit of measure for this item from this vendor.
Rebate Cost	This field prints the rebate cost of the item in this bid from this vendor, per cost unit of measure.
Rebate Code	This field prints the rebate cost code for this item from this vendor. The Rebate Cost Code field determines how the amount shown as the Rebate Cost is used to calculate the final cost of the item. The Rebate Cost Code field may be any of the following: • **F** - Fixed. The amount shown is the actual rebate cost of the item. • **$** - Dollar amount. The amount shown is subtracted from the original cost of the item to determine the rebate cost. • **%** - Percent. The amount shown is the percentage amount taken off the original cost to determine the rebate cost.
Original Cost	This field prints the cost selected as a basis for rebate for this item from this vendor before any rebates or discounts. The Original Cost Code field indicates the source of this cost.

Field/Function Key	Description
Orig Cost Cd	This field prints the original cost code for this item from this vendor. This code determines which cost Distribution A+ will use as the original cost of the item for the rebate for this bid. If the Original Cost Code field is F (fixed), the dollar amount shown in the Original Cost field is the original cost for the item. The rebate cost will be calculated from this value. If the original cost code is **V**, **O**, **A**, **U**, **S**, or **L**, the cost used as the original cost is taken from existing information as indicated below. Additionally, the original cost can then be used to calculate the appropriate rebate for this item and vendor. • **V** - The original cost will be the vendor/item cost as defined for this vendor and item through Vendor/Item Information Maintenance (MENU POFILE). • **O** - The original cost for this item is the cost from the order (as specified through the **Cost to be Used for GL** field on the Price Settings Screen in Order Entry Options Maintenance (MENU XAFILE)). • **A** - The original cost for this item is the average cost as defined for the item and warehouse through Item Balance Maintenance (MENU IAFILE). • **U** - The original cost for this item is the user cost defined for the item and warehouse through Item Balance Maintenance (MENU IAFILE). • **S** - The original cost for this item is the standard cost defined for the item and warehouse through Item Balance Maintenance (MENU IAFILE). • **L** - The original cost for this item is the last cost defined for the item and warehouse through Item Balance Maintenance (MENU IAFILE).
Vend Curr	When International Currency is installed, this field displays the currency code of the vendor to identify the currency for the Commission Cost, Rebate Cost and Original Cost fields.
Price U/M	This field prints the pricing unit of measure for this item.
Override Price	This field shows the override of the final price of this item when the vendor rebate is in effect. The amount in this field is expressed in the pricing unit of measure and will override any other pricing that has been set up for this customer/item, including any defined through contract pricing or defined for quantity discounts.
Override Disc %	This field displays the override discount percent to be used for this item when the vendor rebate is in effect. This override takes precedence over any other pricing that has been set up for the customer/item, including any defined through contract pricing or defined for quantity discounts.

Field/Function Key	Description
Override Disc Cd	This field displays the override discount code to be used for this item when the vendor rebate is in effect. This code determines how the override discount percent is applied. The Override Discount Code field may be any of the following: • **D** - Discount. The amount shown will be deducted from the base price of the item to calculate the item's final price. • **M** - Markup. The amount shown will be added to the rebate cost of the item to calculate the item's final price. • **G** - Gross margin. The amount shown will be added to the original rebate cost of the item to calculate the item's final price.
Price Curr Cd	When International Currency is installed, this field displays the currency code of the customer to identify the currency for the Override Price field.

Chapter 10 Printing the Bid/Quote Summary By Salesrep Report

You can print the Bid Summary By Salesrep Report through Bid/Quote Summary By Salesrep (MENU BQREPT). This report prints header information from each bid selected. Information printed includes the bid number and status, company number, customer number, customer name, bid opening date, rebate start and end dates, and the due dates from the vendor and to the customer. Bid information is sorted by sales representative.

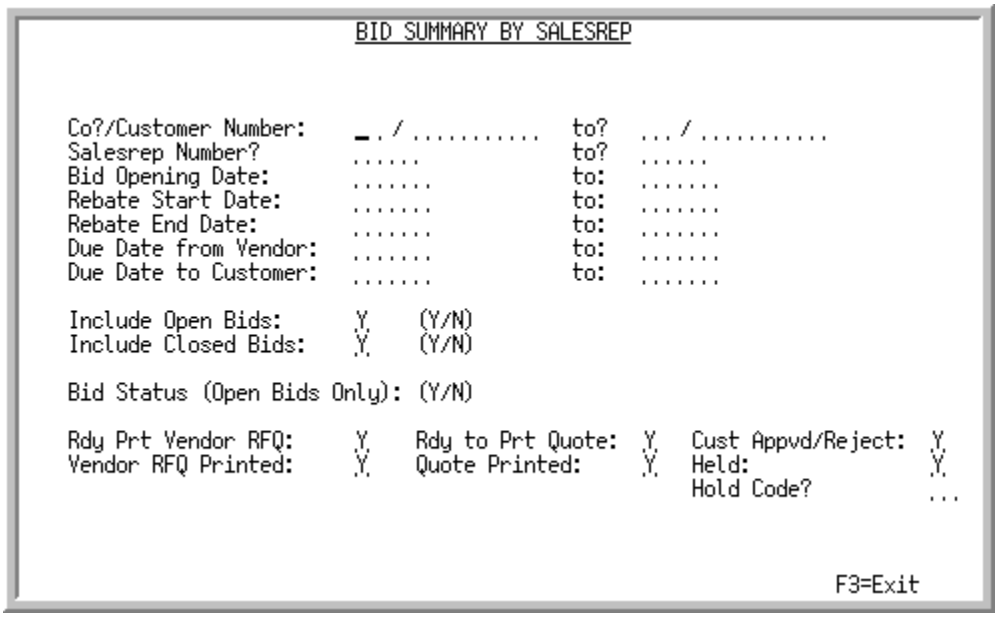
Bid/Quote Summary By Salesrep Report

The screens and/or reports in Bid/Quote Summary by Salesrep and a brief description of their purpose are listed in the following table. A complete description of each is provided in this section.

Title	Purpose
Bid Summary By Salesrep Selection Screen	Used to select bids to print on the Bid Summary By Salesrep Report.
Bid Summary By Salesrep Report	Contains summary header-level information for each bid selected.

Bid Summary By Salesrep Selection Screen

.



This screen displays after selecting option 3 - Bid/Quote Summary By Salesrep Report from MENU BQREPT. Use the selection criteria on this screen to select which bids you want to include on the Bid Summary By Salesrep Report. The criteria you enter in the following From and To fields determine the bids that will print on the worksheet; only those bids that match the criteria entered will print.

Refer to the Infor Distribution A+ Cross Applications User Guide for an explanation of the rules for entering From/To Ranges.

Bid Summary by Salesrep Selection Screen Fields and Function Keys

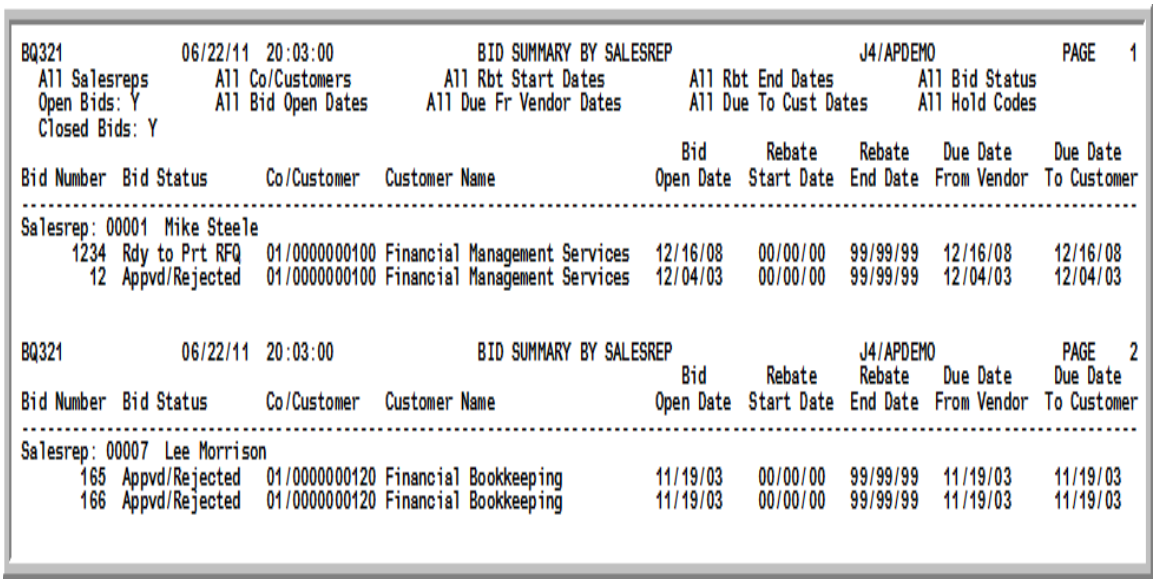
Field/Function Key	Description
Co/Customer Number	The Co field appears only if the Multi Company field is set to **Y** through System Options Maintenance (MENU XAFILE). Key the company number and customer number for which you want to print bid information. Company numbers are defined through Company Name Maintenance (MENU XAFILE). Customers are defined through Customer/ Ship to Master Maintenance (MENU ARFILE). (2 @ N 2,0/N 10,0) Optional
Salesrep Number	Key the sales representative number or range of sales representative numbers for which you want to print bid information. The report is sorted by sales representative. (2 @ N 5,0) Optional

Field/Function Key	Description
Bid Opening Date	Key the date or range of dates that a bid is to be open to participating vendors. The bid opening date is entered through Enter, Change, Delete Bids (MENU BQMAIN). **Valid Values:** Key the date using the Default Date Format for this user, specified through Register A+ User IDs (MENU XACFIG), or if that field is blank, key the date using the system's **Default Date Format** specified through System Options Maintenance (MENU XAFILE). (2 @ N 6,0) Optional
Rebate Start Date	Key the earliest date or range of dates the rebate will be applied to items ordered under this bid. Rebate start dates are entered through Enter, Change, Delete Bids (MENU BQMAIN). **Valid Values:** Key the date using the **Default Date Format** for this user, specified through Register A+ User IDs (MENU XACFIG), or if that field is blank, key the date using the system's Default Date Format specified through System Options Maintenance (MENU XAFILE). (2 @ N 6,0) Optional
Rebate End Date	Key the last date or range of dates the rebate will be applied to items ordered under this bid. Rebate end dates are entered through Enter, Change, Delete Bids (MENU BQMAIN). **Valid Values:** Key the date using the **Default Date Format** for this user, specified through Register A+ User IDs (MENU XACFIG), or if that field is blank, key the date using the system's Default Date Format specified through System Options Maintenance (MENU XAFILE). (2 @ N 6,0) Optional
Due Date from Vendor	Key the date or range of dates by which quotes are due from vendors for items on a bid. Only bids with this due date will be included on the report. Due dates are entered through Enter, Change, Delete Bids (MENU BQMAIN). **Valid Values:** Key the date using the **Default Date Format** for this user, specified through Register A+ User IDs (MENU XACFIG), or if that field is blank, key the date using the system's Default Date Format specified through System Options Maintenance (MENU XAFILE). (2 @ N 6,0) Optional

Field/Function Key	Description
Due Date to Customer	Key the date or range of dates by which a final bid must be submitted to the customer. Only bids with this due date will be included on the report. Due dates are entered through Enter, Change, Delete Bids (MENU BQMAIN). **Valid Values:** Key the date using the Default Date Format for this user, specified through Register A+ User IDs (MENU XACFIG), or if that field is blank, key the date using the system's Default Date Format specified through System Options Maintenance (MENU XAFILE). (2 @ N 6,0) Optional
Include Open Bids	Use this field to select whether you want information from open bids to print on the report. Key **Y** if you want information from open bids to print. Key **N** if you do not want information from open bids to print. **Default Value:** Y (A 1) Required
Include Closed Bids	Use this field to select whether you want information from closed bids to print on the report. Key **Y** if you want information from closed bids to print. Key **N** if you do not want information from closed bids to print. **Default Value:** Y (A 1) Required
Bid Status (Open Bids Only)	Use these fields to limit the report to a certain bid status type for open bids. This filter does not apply to closed bids. Bid status types are: • **Rdy Prt Vendor RFQ** • **Vendor RFQ Printed** • **Rdy to Prt Quote** • **Quote Printed** • **Cust Appvd/Reject** • **Held** Key **Y** in one or more of status fields to indicate that you want bids with that status to be printed on the report. Key **N** in one or more of the status fields to indicate that you do not want bids with that status to be printed on the report. (6 @ A 1) Required

Field/Function Key	Description
Hold Code	If you keyed a **Y** in the Held field to print bids in a hold status, you may use this field to further restrict the bids that print to only those bids with a specific hold code. If Held **is** N, do not enter a hold code. Key the hold code for which bids on this report will be limited. (A 2) Optional
F3=Exit	Press the **F3=EXIT** function key to cancel this option and not print a report. MENU BQREPT will display.
Enter	Press **ENTER** to confirm your selection(s). The Report Options Screen will display. Refer to the Infor Distribution A+ Cross Applications User Guide for details about this screen. Following this screen, the Bid Summary By Salesrep Report will print.

Bid Summary By Salesrep Report



```
BQ321            06/22/11  20:03:00              BID SUMMARY BY SALESREP                    J4/APDEMO              PAGE    1
  All Salesreps       All Co/Customers         All Rbt Start Dates        All Rbt End Dates         All Bid Status
  Open Bids: Y        All Bid Open Dates      All Due Fr Vendor Dates     All Due To Cust Dates     All Hold Codes
  Closed Bids: Y

                                                                            Bid       Rebate     Rebate    Due Date     Due Date
Bid Number  Bid Status      Co/Customer   Customer Name                  Open Date  Start Date  End Date  From Vendor  To Customer
-------------------------------------------------------------------------------------------------------------------------------
Salesrep: 00001  Mike Steele
      1234  Rdy to Prt RFQ   01/0000000100 Financial Management Services  12/16/08    00/00/00   99/99/99  12/16/08     12/16/08
        12  Appvd/Rejected   01/0000000100 Financial Management Services  12/04/03    00/00/00   99/99/99  12/04/03     12/04/03


BQ321            06/22/11  20:03:00              BID SUMMARY BY SALESREP                    J4/APDEMO              PAGE    2
                                                                            Bid       Rebate     Rebate    Due Date     Due Date
Bid Number  Bid Status      Co/Customer   Customer Name                  Open Date  Start Date  End Date  From Vendor  To Customer
-------------------------------------------------------------------------------------------------------------------------------
Salesrep: 00007  Lee Morrison
       165  Appvd/Rejected   01/0000000120 Financial Bookkeeping          11/19/03    00/00/00   99/99/99  11/19/03     11/19/03
       166  Appvd/Rejected   01/0000000120 Financial Bookkeeping          11/19/03    00/00/00   99/99/99  11/19/03     11/19/03
```

This report prints after pressing **ENTER** on the Report Options Screen. This report prints summary header-level information for each bid selected. Bid information is sorted by sales representative. The information printed for each bid includes bid number and status, company and customer, bid opening date, rebate start and end dates, and the due date from the vendor, and due date to the customer.

The bid information that prints on this report is derived from the criteria you entered on the Bid Summary By Salesrep Selection Screen.

Note: All dates will print in the **Default Date Format** for the user that generated the report, specified through Register A+ User IDs (MENU XACFIG), or if that field is blank, the dates print using the system's Default Date Format specified through System Options Maintenance (MENU XAFILE).

Bid Summary By Salesrep Report

Report/Listing Fields	Description
Headings	Program names appear on the upper left corner of the report followed by run date and time, report title, workstation ID, User ID, and page number. Summary of the selection criteria prints in the center of the headings area followed by the individual field headings.
Salesrep	This field prints the sales representative number and name of the primary sales representative for this bid.
Bid Number	This field prints the number assigned to the bid.
Bid Status	This field prints the current status of the bid.

Report/Listing Fields	Description
Co/Customer	This field prints the company number and customer number of the primary customer for this bid.
Customer Name	This field prints the name of the primary customer for this bid.
Bid Open Date	This field prints the date this bid is to be open to participating vendors.
Rebate Start Date	This field prints the earliest date the rebate will be applied to items ordered under this bid.
Rebate End Date	This field prints the last date the rebate will be applied to items ordered under this bid.
Due Date From Vendor	This field prints the date by which quotes must be received from vendors for items on this bid.
Due Date To Customer	This field prints the date by which a final bid must be submitted to the customer.

Glossary

Approved/Rejected	Approved/Rejected is the bid status when the customer has received the quote, returned it to you, and you have marked all applicable line/sub- lines as customer approved/rejected. This could also apply to distributor approved/rejected costs quoted by vendor.
Bid	A Bid is a request from a customer or a group of customers to quote prices for an item(s) on a potential order based on costs quoted from one or more vendors. Once a bid has been approved by a customer, a bid posting process automatically creates rebates by writing to the Rebate Master File.
Bid Status	Several Bid Status types exist in order to track a bid through the bid and quote process. In order to perform particular steps, such as closing a bid or printing a Vendor RFQ, a bid must have a certain status, thus confirming that required steps have been performed for the bid beforehand. The following bid status types exist for a bid: • RFQ Ready • Held-XX • RFQ Printed • WS-Bid Mnt • Quote Ready • WS-Prt RFQ • Quote Printed • WS-Prt Qte • Approved/Rejected • WS-Closing • Closed • WS-Marked
Closed	Closed is the bid status when all line/sub-lines of the quote have been marked as customer approved/rejected and you have closed the bid through Close Bids (MENU BQMAIN - Option 2).

Customer Approval Code	The Customer Approval Code is the code used in Enter, Change, Delete Bids (MENU BQMAIN - Option 1) to designate whether an item on a bid has been approved or rejected by the original primary customer who requested the quote. If **Y** is entered in the Customer Approval Code field on the Add Item Screen in Enter, Change, Delete Bids (MENU BQMAIN - Option 1), the line/sub-line for that item is marked as customer approved. If **N** is entered in the Customer Approval Code field on the Add Item Screen, the line/sub-line for that item is marked as customer rejected. If the Customer Approval Code field is left blank, the line/sub-line for that item is marked as undecided.
Held-XX	Held-XX is the bid status when the bid has been placed on hold through the Bid & Quote End Screen with a valid hold code. The XX represents the two-character hold code that was used to put the bid on hold through the End Screen.
Quote	A Quote is the pricing response to a bid. Quoted costs, submitted by vendor to distributor, are submitted both by the vendor to the distributor, and by the distributor to the customer in response to item/price information requested on a bid.
Quote Printed	Quote Printed is the bid status when all line/sub-lines of the bid have been vendor approved/rejected, all vendor approved line/sub-lines have had item cost and price information entered, and you have printed/faxed and sent the quote to the customer.
Quote Ready	Quote Ready is the bid status when the appropriate vendors have received the request for quotes and have returned bids with their cost information, you have marked all line/sub-lines as vendor approved/rejected (**Y** or **N**) through Enter, Change, Delete Bids (MENU BQMAIN - Option 1), and all vendor approved line/sub-lines have had item cost information entered.
Request for Quotes (RFQ)	A Request for Quote (RFQ) is a request for a cost response to a bid. Vendor RFQs are printed/faxed to vendors for one or more item(s) on one or more bids.
RFQ Printed	RFQ Printed is the bid status when a bid has been entered, items have been assigned to the bid, and you have printed/faxed and sent the request for quotes to the appropriate vendors.
RFQ Ready	RFQ Ready is the bid status when a bid has been entered into, items have been assigned to the bid, vendors have been chosen, and you are ready to send the request for quotes to the appropriate vendors.

Vendor Approval Code	The Vendor Approval Code is the code used in Enter, Change, Delete Bids (MENU BQMAIN - Option 1) to designate whether you, the Distributor, has approved or rejected the item cost that the vendor has given you on the RFQ for your desired items. If **Y** is entered in the Vendor Approval Code field on the Add Item Screen in Enter, Change, Delete Bids (MENU BQMAIN - Option 1), the line/sub-line for that item is marked as vendor approved. If **N** is entered in the Vendor Approval Code field on the Add Item Screen, the line/sub-line for that item is marked as vendor rejected. If the Vendor Approval Code field is left blank, the line/sub-line for that item is marked as undecided.
WS-Bid Mnt	WS-Bid Mnt is the bid status when the bid is currently being maintained at another workstation.
WS-Closing	WS-Closing is the bid status when the bid is currently being closed at another workstation through Close Bids (MENU BQMAIN - Option 2).
WS-Marked	WS-Marked is the bid status when the bid is currently being maintained through Open/Closed Bid Inquiry (MENU BQMAIN -Option 12).
WS-Prt Qte	WS-Prt Qte is the bid status when the customer quote is currently being printed at another workstation.
WS-Prt RFQ	WS-Prt RFQ is the bid status when the Vendor RFQ is currently being printed at another workstation.