



## Quick Reference Guide (QRG) Summary of Changes

**Creation Date: 01-22-2026**

---

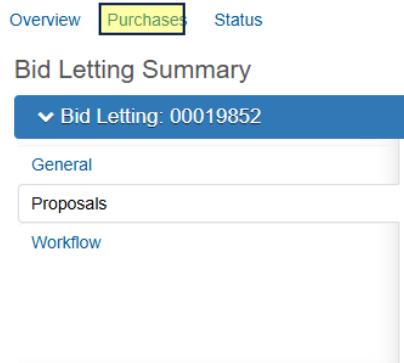
**Revised Date:**

**Revised By:**

**Changes Made:**

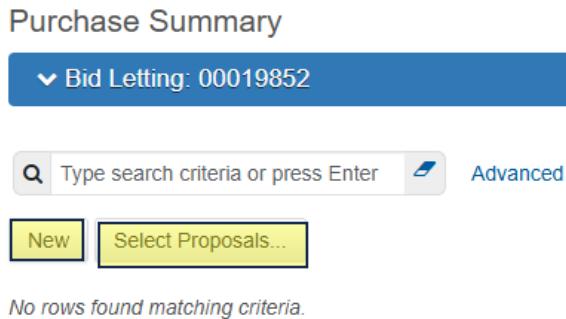
## Adding Purchases

**Step 1:** From the **Bid Letting Summary** page, click the **Purchases** quick link at the top of the screen.



The screenshot shows the 'Bid Letting Summary' page. At the top, there are three quick links: 'Overview' (blue), 'Purchases' (yellow, indicating it is selected), and 'Status' (blue). Below the links, the page title 'Bid Letting Summary' is displayed. A dropdown menu is open, showing 'Bid Letting: 00019852' in a blue box. Underneath this, there are three options: 'General' (light gray), 'Proposals' (white), and 'Workflow' (light gray). The 'Proposals' link is underlined, suggesting it is the next step.

**Step 2:** On the **Purchase Summary screen**, click either the **Select Proposals** button to add **Multiple Proposals** to the same **Vendor** or the **New** button to add a **Single Proposal**.



The screenshot shows the 'Purchase Summary' screen. At the top, there is a blue header bar with a dropdown menu showing 'Bid Letting: 00019852'. Below the header, there is a search bar with a magnifying glass icon and the placeholder text 'Type search criteria or press Enter'. To the right of the search bar is an 'Advanced' link. At the bottom of the screen, there are two yellow buttons: 'New' and 'Select Proposals...'. The 'New' button is on the left, and the 'Select Proposals...' button is on the right. Both buttons are highlighted with a yellow background and black text.

*No rows found matching criteria.*

## Select Proposal Button Steps

**Step 3 (Select Proposals Button):** From the **Select Proposals** pop up window, select the needed **Proposals** and click **Add to Purchase**.

✓ 785	250117	BRIDGE WATER PROOF SEAL	SSP-269F(114)PM
<b>Add to Purchase</b>			

**Step 4 (Select Proposals Button):** The records you added are now displayed on the **Purchase Summary page**. You may go into each record and record the number of plans purchased or other information about the purchase.

250047 - INTERCHANGE	786
▼ 811802468 - Built Right Construction, LLC	
Vendor ID	Quantity of Proposals
<input type="text" value="811802468"/> Built Right Construction, LLC	
Invoice Number	Quantity of Complete Plans
102456	
Proposal ID	Quantity of Plans Without Cross Sections
<input type="text" value="250047"/> INTERCHANGE	Quantity of Plan Sheets
Valid For Bidding	Number of Labels
Yes	
Date of Purchase	
03/19/2025 1:13:07 PM	
Bill To Address	
<input type="text"/> Begin typing to search or press Enter	
Ship To Address	
<input type="text"/> Begin typing to search or press Enter	

**NOTE:** If you make any changes on the **Purchase** you added, make sure you click the **Save** button to save the entered info.

## New Button Steps

**Step 3 (New Button):** Enter the **Vendor ID, Invoice Number, Proposal ID**, and any other needed/desired fields.

250047 - INTERCHANGE

00000001 - DUMMY INSURANCE COMPANY

Vendor ID*▼	<input type="text" value="00000001"/> DUMMY INSURANCE COMPANY	Quantity of Proposals▼	<input type="text"/>
Invoice Number▼	<input type="text" value="1"/>	Quantity of Complete Plans▼	<input type="text"/>
Proposal ID*▼	<input type="text" value="250047"/> INTERCHANGE	Quantity of Plans Without Cross Sections▼	<input type="text"/>
Valid For Bidding▼	<input type="checkbox"/>	Quantity of Plan Sheets▼	<input type="text"/>
Date of Purchase		Number of Labels▼	<input type="text"/>
Bill To Address▼	<input type="text" value="Begin typing to search or press Enter"/>		
Ship To Address▼	<input type="text" value="Begin typing to search or press Enter"/>		

**Step 4 (New Button):** Click the **Save** button after entering the needed fields.

