

Requests - Job - Project

For a description of the three left-hand panels, click [here](#) for [Project](#).

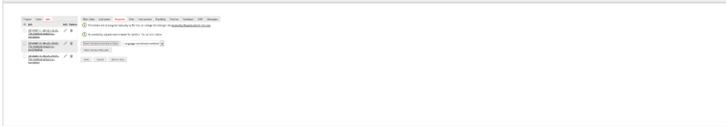


The Request tab is where you can send requests to vendors in which vendors are available for and interested in an individual

To change the way vendor will be assigned to this job, click on [Requests - Task - Project](#).

This page is divided into two sections: 1) [Before Requests Have Been Sent](#) and 2) [After Requests Have Been Sent](#).

Before Requests Have Been Sent



If you have not already sent the availability requests from either the [Availability Requests - Task - Project](#) tab, you can select the vendors to receive the requests by running a filter or manually choosing vendors from the vendor database.

[Select Vendors According to Rules](#)

Click to have the vendors automatically selected in accordance with the rules defined in the selected filter.

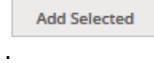
To limit the vendors, first click on the drop-down list and select the filter. Then click on the button.

To create a filter, go to [Configuration > Workflows > Vendors](#) for [Availability Requests](#).

[Select Vendors Manually](#)

Click to manually select the vendors to whom availability requests will be sent.

When you click on this button, a window with the [Vendor Browser](#) will appear. In the boxes of the vendors to whom the availability requests will be sent, click on the [Add Selected](#) button.



After Requests Have Been Sent



After you select the recipient vendors by either the filter or manually, a window where you can set the request deadline and in which the request appears.



For a description of the window, click on [Availability Requests Window](#).

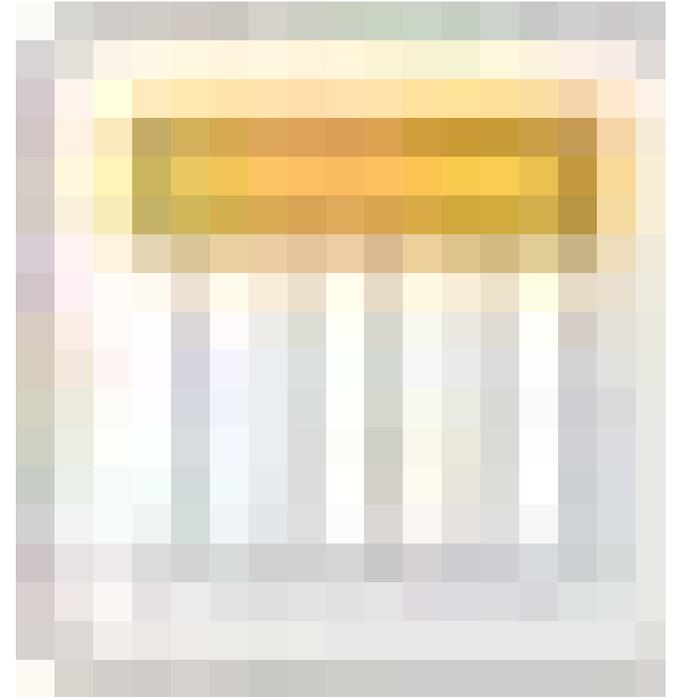
After Requests Have Been Sent



After the availability requests are sent from either this tab or - Task - Project, you can edit and send again the request to review the status of the requests and assign a vendor to the :

Requests Deadline

The final date permitted for the vendors' responses to this job
Manually enter the date in the appropriate date format set in n or click



and select from the calendar.

+ Add

Click to add a new vendor to the Requests table.

- When you click on this button, a window with the **Vendor Selection** window appears. Select the boxes of the vendors to whom the availability requests will be sent and then click

Add Selected

- After you select the new vendors, the **Availability Requests** window appears. You can resend the availability requests again to the selected vendors. You can click

Cancel

and from the Requests table send the availability requests to the selected vendors.

- If you clicked

Cancel

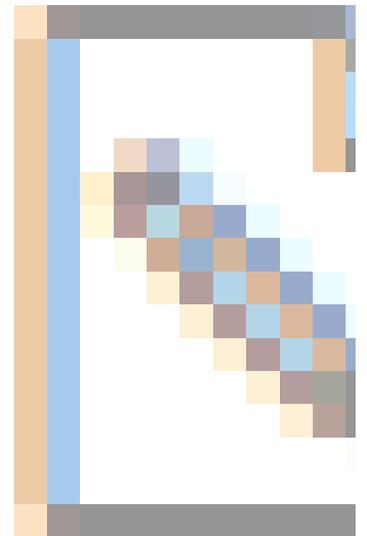
and want to send the availability requests to only the selected vendors, you can do either of the following:

- Select the vendors from the Requests table, click



and then select **Send Selected Requests**. The **Requests Window** appears but now with only the selected vendors and not all of them.

- Click



to manually send a request to the vendor. When you click **Send Selected Requests**, a new window appears. For a description of this window, see [E-mail Test Window](#).

Refresh

Click to update the entities in the Requests table.

View: default

default (Default)

+ Create new view

Click to configure what and how information will be displayed in the Requests table.

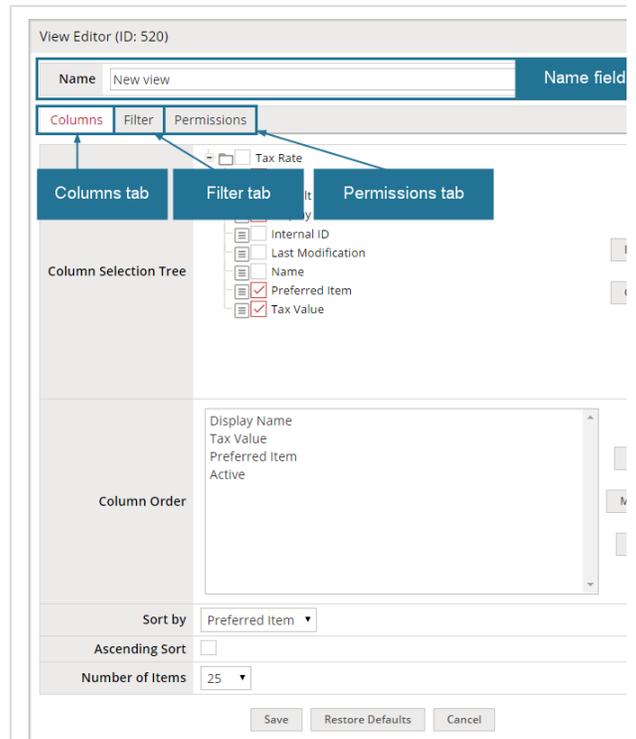
When you click

+ Create new view

, the View Editor pop-up window appears.

Click here to find out more about the View Editor pop-up window...

View Editor Pop-up Window



In the View Editor pop-up window you can configure what you want to display in the view. You can edit existing one. You can provide the name for your new view. In the Columns tab you can specify what information is displayed in the view. In the Filter tab you can specify filtering options which can be used to browse the entities. In the Permissions tab you can specify which groups of users can use the view prepared by you.

Name field

Name field

Columns tab

View Editor

Name

Columns Filter Permissions

Column Selection Tree

- Tax Rate
- Active
- Default
- Display Name
- Internal ID
- Last Modification
- Name
- Preferred Item
- Tax Value

Column Order

Display Name
Tax Value
Preferred Item
Default
Active

Sort by

Ascending Sort

Number of Items

Save Restore D

In the Columns tab you can select what information is displayed and in what order are the columns displayed and how many items is

Column Selection Tree section

Column Order section

Sort by drop-down menu

Ascending Sort checkbox

Number of Items drop-down menu

Save button

Cancel button

Restore Defaults button

Filter tab

The screenshot shows the 'Filter' tab of a View Editor pop-up window. At the top, there are three tabs: 'Columns', 'Filter' (which is active and highlighted in red), and 'Permissions'. Below the tabs, there are two checked checkboxes: 'Filter Expanded' and 'Reset Filter when Selecting This View'. The main area contains a list of filters for a group named 'Filter'. Each filter entry includes a name, a sort order indicator (up or down arrow), an edit icon (pencil), and a delete icon (X). The filters listed are: 'Template Name', 'Template Type', 'Language', 'Default Template', 'Built-in Template', 'Active', and 'Output Format'. At the bottom of the filter list is a dropdown menu with the text 'Choose filter from list..'. Below the filter list are three buttons: 'Create Group', 'Expand All', and 'Collapse All'. At the very bottom of the window are three buttons: 'Save', 'Restore Defaults', and 'Cancel'.

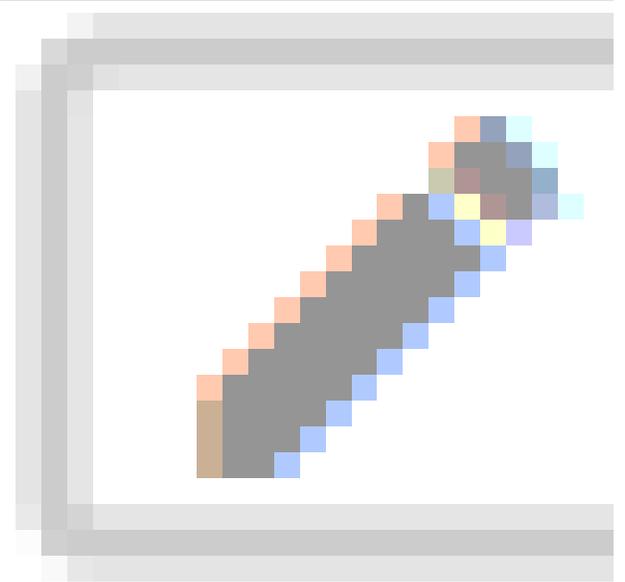
In the Filter tab of the View Editor pop-up window you can manage filters. You can also set up the details of the particular filter.

Filter Expanded checkbox

Reset Filter when Selecting This View checkbox

Group field

Choose Filter from the List drop-down menu



icon

Create Group button

Expand All button

Collapse All button

Save button

Cancel button

Restore Defaults button

Permissions tab

View Editor

Name

Columns **Filter** **Permissions**

All Groups
Available Items

Shared with

- Accounting
- Add-On User Group
- Administrators
- In-house Vendors
- Management
- Project Managers
- Sales

Save **Restore Defaults**

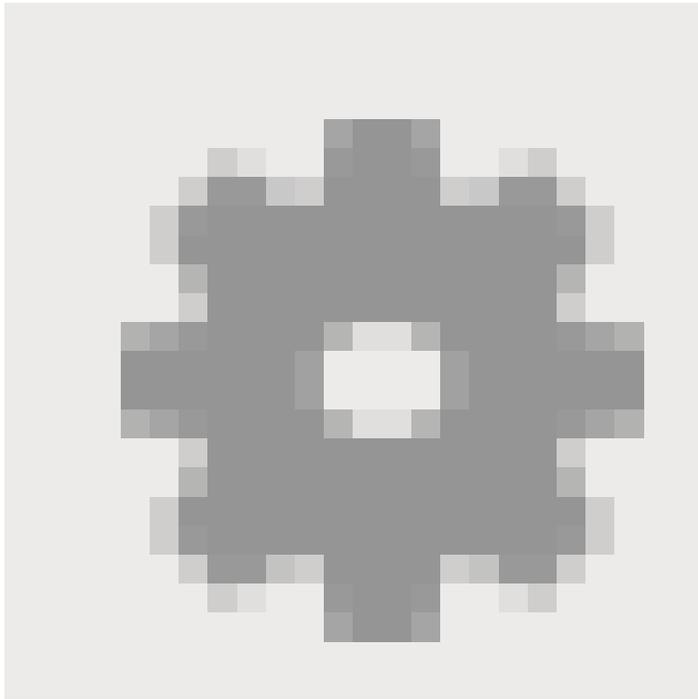
In the Permissions tab of the View Editor pop-up window editing.

Shared With section

Save button

Cancel button

Restore Defaults button



Actions which you can apply to either one or multiple entities

This button is recommended to manage and/or modify at once.

[Click here for a description of the actions...](#)

<ul style="list-style-type: none">Selected 1/2 ItemsSelect AllDeselect AllSend AllSend SelectedApprove SelectedReject SelectedSelect Checked Vendor	The list of available actions.
Select All	To select all the vendors in the Rec
Deselect All	To deselect all the selected vendor ble.
Send All Requests	To send availability requests to all Requests table.
Send Selected Requests	To send availability requests to the in the Requests table.
Approve Selected	To approve the requests of the sel
Reject Selected	To reject the requests of the select
Select Checked Vendor	To assign the selected vendor to th
	This action can only be perf vendor at a time.

Edit

Click to modify.

Save

Click to apply the modifications.

Cancel

Click to terminate the modification process.

Back to Task

Click to return to this job's task.