

BID PRO – ADVANCED ESTIMATING



July 12th, 2018
Joey Denson CFE
RFMS Training and Implementation

Overview

Bid Pro allows users to reduce time and cost associated with creating bids for builder, commercial and multi-family work. Learn how to set up reusable templates, create a flexible bid, update both bids and templates, export an accepted bid to Order Entry, track bid changes, generate reports and send the accepted bid in PDF format to a client for review.

Key Features of Bid Pro

- Create reusable templates and estimates
- Print out Estimate sub-totals for client by area
- Use price levels from products or cascade feature to create selling prices
- Track bid amount (allowed) vs. what was used (actual)
- Create sub-estimates for multiple bids for the same project
- Create overages when exporting to Order Entry
- Import RFMS Measure documents into BidPro

Class Outline

- Creating an Estimate or Template
- Print Functions
- Export to CSV
- Quick Copy to a new Estimate or Sub-Estimate
- Export or Append Estimate or Template to Order Entry

- Overages
- Reports –Filters
- Maintaining-Updating Bids (Range Edit)

Creating an Estimate or Template

What's the difference between a template and estimate

Estimate

Estimates are dynamic; they can be changed, edited and modified as many times as you want, with BidPro saving the most current changes as the Estimate.

Template

Templates are locked down; when you initially create your Estimate/Template you can choose Template. With this function, you can lock down the details so that nothing can be changed on the Template. This is particularly helpful on projects where you want to keep the totals the same and prevent anyone from accidentally changing the information.

A few examples: property management and new home construction floor plans where the material and measurements stay the same and each time there is a new order you can quick copy or just export directly to order entry.

After an Estimate is created, you can also mark as a Template by right clicking on the Estimate and selecting Template.

Required Fields for Header

- Select Estimate or Template (Default is Estimate)
- Select Estimate Number
- Store Code
- Estimate Date
- Customer (Sold to from Order Entry)
- Project (Ship to from Order Entry)
- Overage* (only required if this will be an overage order)
- Model (floor plan or area description)

Add a line to the Estimate or Template

- Select area from list or manually type in (utilizing areas will allow you to subtotal Estimate)
- Select Product Code
- Select material to install from Products, Inventory or Manually enter
 - If products are imported into an Estimate then from here all you need to do is enter quantity, verify cost, and fill in use tax, freight, load, overhead and selling price via price levels or GP.
 - Freight and load can be preset via the products file and overhead factor can be preset in Order Entry Parameters.
 - If products are manually entered into an Estimate, then you will need to enter in addition to the items referenced above style, color, description and supplier.

Allowed vs. Actual Fields

BidPro allows the ability to track what was bid (allowed) vs. what was used (actual).

- This functionality stores what the client or a third party such as a homeowner or lessor selected vs. what was initially bid to the client or contractor.
- This feature is also used to create Overages which is explained further on in the outline.
- If you don't need to track the difference, this function can be turned off on each line or in BidPro parameters.

Other Functionality

Copy Line

Allows you to duplicate entire line, exclude product or exclude quantity

Gross Profit Percentage (cascade feature)

Lines can be entered with cost only without populating a selling price or picking a price level from products and this feature will allow a Gross Profit percentage to all lines or only tagged lines at one time.

Up to three (3) preset GP percentage can be set in parameters, or on a job by job basis. If this is selected in advance the GP percentage will auto calculate this percentage for each line as they are added.

Templates *(previously called "Bundles")*

By utilizing this NEW feature, you now have the ability to pick groups of selected items without having to select each one manually.

- Examples of Templates: Standard carpet, Builder Carpet, Property management

Adjust Totals

A function was added to allow entering a new total for an estimate and the actual line amounts (and possibly miscellaneous charges) will be adjusted proportionally to force the estimate to match the desired estimate total.

Example: If total or lump sum selling price needs to be matched the amount can be entered as the total selling price. This routine will make necessary adjustments to match the desired total.

This feature is made **for making small adjustments to the total** and is not a replacement for adding pricing to the bid i.e. leaving cost = price then adjusting the total to match the desired profit percentage. If there is an overage amount on the estimate, the allowed will not be modified; if no overage amount is present the allowed will be changed to match the actual totals.

Original Product Information

BidPro now stores on the estimate line the product information assigned to a new line and displays it as 'Original Product' on the line edit screen. This information will not change even when product information is edited on the line. The original product information and original cost are now printed on the Overage Analysis report.

Cost Changes on Lines

Some companies choose to routinely update the costs on all estimates. A feature has been added to indicate changes made.

- First a column for current cost was added on the **lines** area of the **Change Bid Information** Screen.
- Next if a change in cost has been made the current cost will be colored as follows:
 - If the current cost from products is greater than the original cost on the bid it is listed in **red**. (See line 1 in the example BidPro lines)
 - If the current cost from products is less than the original cost on the bid it is listed in **green**. (See line 2 in the example BidPro lines)
 - Unreferenced lines are red if the switch in *system options is* set to display as such; on these lines the cost is showing in **green** and as 0.00 which is technically correct since this record does not have a product record.

(See line 3 in the example BidPro lines)

Line Number	Area	Style	Color							
PC	Line	Area	Item #	Style/Name	Color/Description	Allow Price	Difference	Current Cost	Overage Cost	Allowed Cost
06	1	CERAMIC FLO	GEN13	GENOA 13x13	CAMPETTO	1.55	0.00	1.1800	1.1500	1.1500
06	2	CERAMIC FLO	KERICOLOR-S	GROUT-MAPEI (25#	ALABASTER 01	12.97	0.00	9.7000	9.7500	9.7500
11	3	CERAMIC FLO	FIN	FINISHING		664.89	0.00	0.0000	500.0000	500.0000

Figure: BidPro Lines

Copy Info

This option allows you to copy information from one line onto all tagged lines. Select the appropriate parameters and destination lines and click the OK button to continue. Once this change has been made it cannot be undone.

Copy Line Info

Description
This function will copy any or all of the following fields to ALL TAGGED LINES or ALL LINES IN THE SELECTED AREA on the estimate, recalculating lines and estimate totals when needed. This change cannot be undone.

Select parameters to copy

Copy quantity

Copy style

Copy color

Copy Item Number

Copy quantities to

Actual fields Allowed fields

Destination lines:

Tagged lines only (No lines were tagged)

The following lines:

Lines in area:

Line with pr code:

Figure: Copy Line Screen

Buy Quantity

Use this option to change the quantity to match the buy quantity. If you have buy/sell quantity set up on the product record, you may set Parameters (Private Parameters) that allow you to change these buy/sell quantities manually or automatically on the estimate line. You may also do this with multiple lines or on a line-by-line basis depending on how the parameters are set. For example, for 3 areas with the same ceramic tile, the three lines can be combined to get a quantity that matches a full carton.

❖ *Best Business Practice: When using BidPro, it is recommended that you select all lines for an estimate from Products or Inventory. By doing so you will keep all of your data and information uniform. This will allow you to utilize up-to-date cost from E-Commerce or Gateway and also price levels from Products. If you manually type in the information (unreferenced), there is no correlation to true cost that is in inventory or products.*

Print Functions

Estimate Printing Parameters (as of v 15 have been significantly changed)

Add cover page, signature or logo to estimate

In the case of all three items this can be configured at time of printing. The cover page and approval signature, can be add on word documents that you can program to print with each estimate.

Line Grouping

Line Grouping allows you to print by area, so that like items will be sub totaled on the estimate.

Report Headers section 3/4

- Allow you to modify the titles of the estimate

Email of Estimate directly from BidPro

- Configure your email settings
- Click email option enter in email address and any pertinent message and send

Figure: Print Parameters Screen

Estimate Options

- **Print Line Detail** Selecting this option will print each estimate line as they are entered
- **Combine Labor/Material/Miscellaneous Totals** Selecting this will print a single total rather than a sub total for labor, material and miscellaneous charges.

- **Print on Letterhead**-Selecting this will not print the company name address and logo.
- **Zero Line Totals** Selecting this option will print lines entered on the estimate that have a ZERO entered for the selling price.
- **Print Estimate Total Detail** Selecting this option will print detail information on the estimate.
- **Print Product Code Totals** Selecting this option allows you to print a listing of all material used for a specific estimate by product code.
- **Print Title Tag** Selecting this option will allow you to print a Title that you can type onto each estimate
- **Save Current Format** this memorizes your print options for next time

ESTIMATE# JE000007-001
DEMO DATA
 902 23RD STREET
 Tuscaloosa, AL 35401
 Telephone: 555-222-3333 Fax: 555-222-3334
 My Title Tag
 ESTIMATE Date 07/20/09

- **Print Form Boxes** Selecting this option allows you to print border boxes and enter the titles on those boxes.

With Boxes


CLIENT	PROJECT
LAW, JOHN 1 KNOB HILL CHARLOTTE, NC 28201	LAW, JOHN 1 KNOB HILL CHARLOTTE, NC 28201
JOB # MODEL MODEL	Salesperson: SALLY JONES

Without Boxes

LAW, JOHN 1 KNOB HILL CHARLOTTE, NC 28201	4105559854	LAW, JOHN 1 KNOB HILL CHARLOTTE, NC 28201
JOB # MODEL MODEL		Salesperson SALLY JONES

- **Print OVERAGE Information Only:** Checking this box will print all the line details, but only the overage charges. With this box checked, some of the line detail options are no longer available.
- **Line Detail Options** Selecting an item includes the detail, deselecting would not include it on the printed estimate.

Cover & Pictures

Print Cover Page-  To attach a cover page to this printed document, select this option. Use the RTF cover page maker that is located on the toolbar of the main estimate screen, from which basic word processing tools are available. You may also use Microsoft Word (or any program that has the capability of saving as a Rich Text file) and save the cover page as an RTF. Enter the cover page information. When finished, click the Save button located on the top of the toolbar. You will be prompted to save the cover page in a particular directory on the computer. When printing, please note that any pictures attached to a RTF file are not supported and will not be printed. If you wish to print pictures, see the following explanations.

Click the ellipsis button to attach the appropriate cover page to this estimate. Once this is selected it is sticky, meaning it will be there the next time you print. You can edit the file from here for example if you want to personalize for this specific print.

Print Approval Signature

Once this is selected it is sticky, meaning it will be there the next time you print. This allows you to add a signature area below the last line on the printed document. You can edit the file from here for example if you want to personalize for this specific print.

Subtotal by Area

Selecting this option prints the entire Estimate and subtotals the line detail by areas. The lines will be sorted by area unless you are using a sort grouping.

JOB # MODEL	FINAL BID FINAL	Salesperson TERRY E					
Area	Style/Item	Color/Desc	Units	Width	Qty	Price	Total
013	OUTSIDE CORNERS RUBBER 6"	179 STEEL	EA		125.00	1.45	181.25
Combined Areas:							
Area: 013 (1, Qty: 125 EA)							
013	REDUCER-CPT. TO CONC. JOHNSONITE 179 STEEL		LF		60.00	0.87	52.20
Combined Areas:							
Area: 013 (1, Qty: 60 LF)							
013 Area Total						Sub-Total	233.45

Select Lines

If you select this option, you can then click on the button to tag the lines to include.

❖ *Best Business Practice: Using the area field to describe material type or the area it's being installed in, will allow you to print a work order and picking ticket from Order Entry with these values. By doing this, the installer and warehouse will have complete instructions of what materials are needs and where it's to be installed.*

Print Groupings



This screen allows viewing all lines of an estimate by user-defined areas. From this screen you may sort and label the estimate lines to suit the specific printing purposes using the [Layout Names](#) and [Groups](#) for subtotalling fields. This screen also displays areas of assigned and unassigned estimate lines.

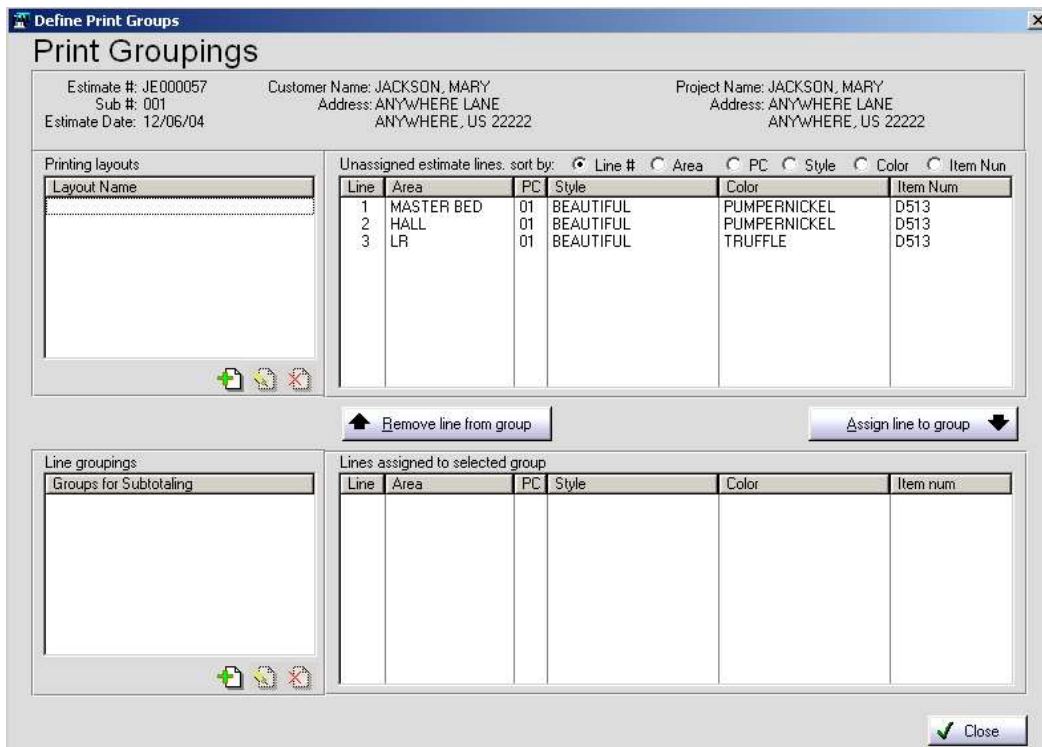


Figure: Define Print Groupings

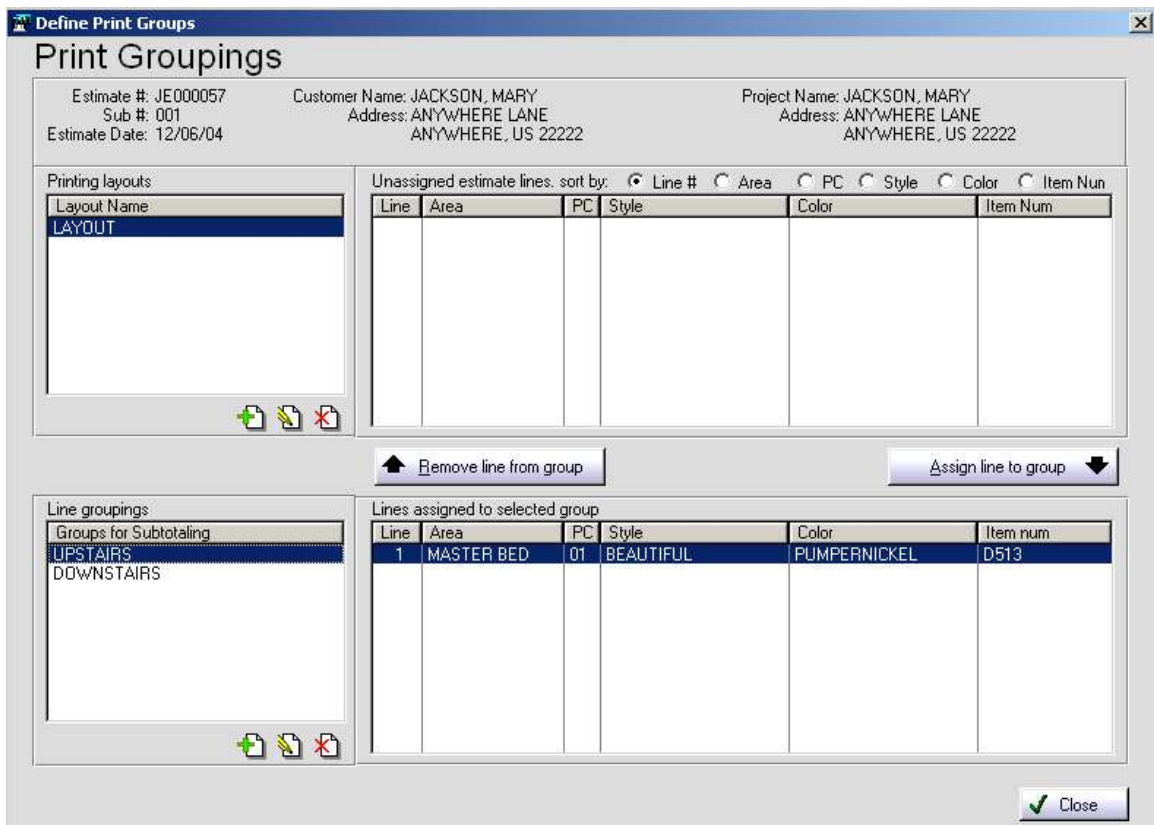
Group-Layouts

Click on the Insert button to create a new set of sorts (Layout). This option allows you to customize the user-defined areas for printing. You may also change or delete a previously existing LAYOUT name. By setting up these sorts, you will have the option to print a more specific estimate. You may enter as many Layouts as necessary.

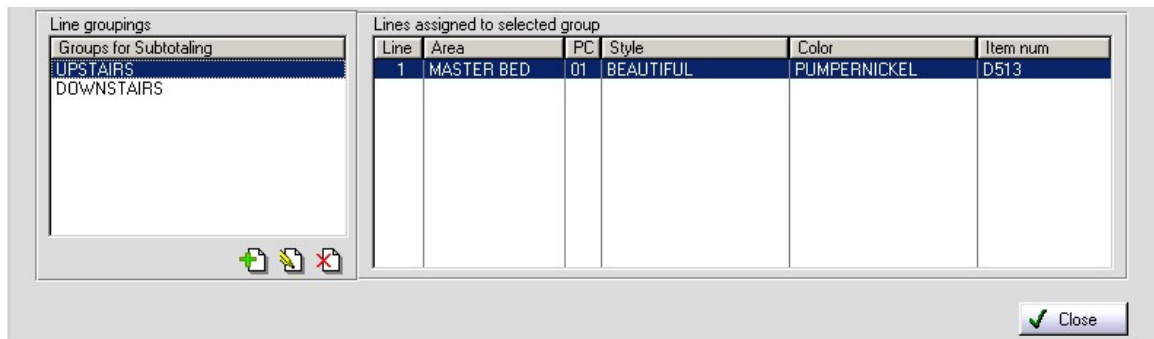


Groups

Click on the insert, change or delete buttons under the Groups heading. Using this option will allow you to create, alter or delete group names that will be used along with [Layouts](#). Once created, select a group, then drag and drop the lines you want in that group from the top browse box to the bottom box. Continue this process until all lines are assigned to a group.

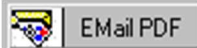


For example, on LAYOUT 1, if you wish to group all material into two different Groups for Subtotaling called; Upstairs and Downstairs, select the areas that correspond with that part of the house and assign them to a group. In the example above you can see that the Den and the Study are together under the Downstairs group. If you were to click the Upstairs group (to the left of the screen under Groups for Subtotaling) you would see that the Master Bedroom and Hallway are there (Shown below). As many Layouts and Groups can be created as needed, so that you can create more diverse and user defined estimates.



Email Estimate

Sending Email from Bid Pro

- Click the **email pdf** button. 
- The **enter email information** screen will display.

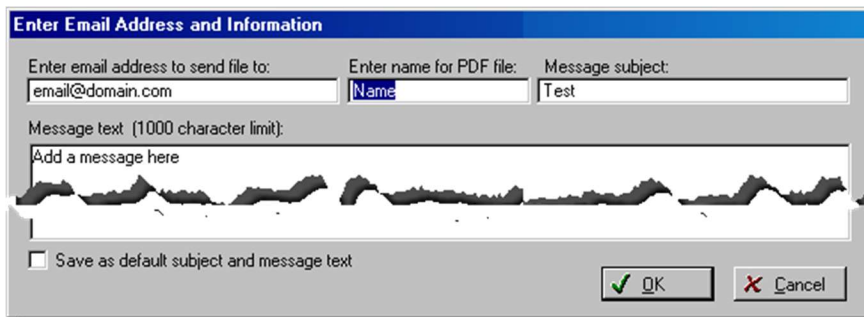


Figure: Sample email from BidPro

- Type in the email address of the recipient. (Multiple email addresses can be entered separated by a semi colon.)
- Enter a File name for the pdf file which will be created.
- Type in a message subject and message text if desired.
- Click the box in the lower left corner to save the subject and text entered as the default for all email sent from BidPro.
- Click **OK**. Outlook will open with the message ready to edit or send.

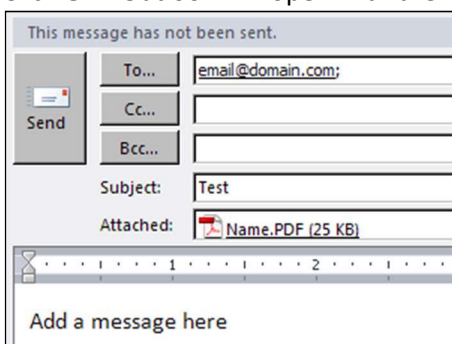


Figure: Sample email from BidPro

The pdf file created will be saved to the RFMS directory.

How do I Set up Email from Bid Pro?

BidPro has had the ability to send email through an internet email server or can send email via outlook. ***If you have your email configured in system options or order entry set up, it'll already be configured in BidPro.

Configure Email

Each workstation must be configured for emailing.

Minimum information required is an email address, the name of the email server and the user name and password to access the account. This will normally be found in Outlook, Outlook Express or other email program set up.

Outlook

If a system is currently set up for emailing via internet email server this will continue to work. To change to using Outlook, click the **Configure Email** button. Then choose to use my outlook.

Figure: Select email preference

If a system is not currently set up for emailing via internet email server, it will default to **use my outlook**.

SMTP Server

This does not require that outlook be installed on the workstation, but you must have an email server or service that you are using for email that conforms to normal SMTP mail standards (ie AOL may not work.) The workstation **must be connected to the internet** before attempting to send email. If you need assistance with this, please contact a local technician.

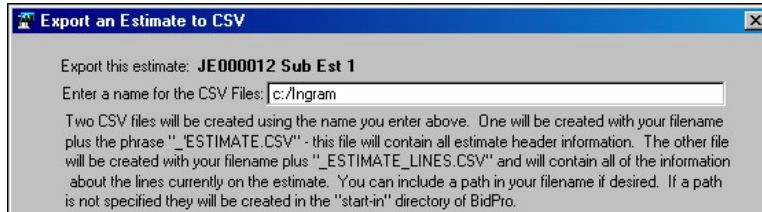
Export to .CSV

BidPro has the ability to export an estimate to a .csv file to allow customization of bids.

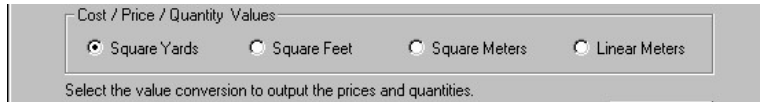


- From the BidPro main screen, highlight the estimate to export, click on the **export** button. This brings up the Export dialog box.
- Enter the name of the .csv file.

- The location for saving the file can also be changed from default location (RFMS directory). The file below will be saved to the “C” drive.



- Select the value conversions to output the prices and quantities.



- Click export. Files will be created in the location specified

After the export is completed a message will be displayed stating the process is complete.

Two Files will be created:

Ingram_ESTIMATE_LINES.CSV	1 KB	Microsoft Office Excel Comma Separated Values File
Ingram_ESTIMATE.CSV	1 KB	Microsoft Office Excel Comma Separated Values File

ESTIMATE.CSV- contains the estimate header information

ESTIMATE_LINES.CSV-contains the line information.

Export or Append Estimate or Template to Order Entry

Export

- Find and highlight estimate or template to be exported
- Fill in order number, estimate date, customer type, estimate delivery date and PO number
- Tag lines to export
 - For property management and builder, you may not need all lines from the estimate at this time, so only tag what lines are needed
- Select where you want line notes and custom messages to go (if there are any)
 - Options for line notes: workorder and order lines
 - Options for custom messages: Custom message or workorder custom message

When exporting, you can also have the lines combined for the invoice, but not the workorder. This function called “combine and append to similar lines”, will group like lines together so the invoice will be have all the same materials combined into one line, but the workorder will still be separated by area.

- This function makes the invoice more consolidated, and make the job of purchasing items easier, since they will be combined as one line for purchasing, instead of having the same material on multiple PO lines.

How does the Append option work and when does it apply?

Appending lines to an existing order is particularly helpful if a job is being done in phases but the lines will be created as needed on the order. If it is important to have only one invoice in order entry, lines can be selected to append to an existing order using the export function and enter the existing order number.

This function can also be used when if there are multiple estimates or templates that will be used to create only one order or invoice in order entry. The append option will export lines from these estimates or templates into the order specified

To append and estimate to an existing order,

- Find and highlight estimate or template that lines will be selected to append to an existing order
- Fill in type in the existing order number the lines will be added to
- Tag the lines to be appended
- Select notes setting as outlined above
- When export option selected a message will appear that the lines will be added to the existing order.

❖ *Best Business Practice: Since exporting an Estimate or Template creates an order in Order Entry, it is recommended that a password be set on the export function to prevent unauthorized staff from exporting orders. By doing this a staff member can be put in charge of exporting jobs and can review all Estimates before they are converted, to ensure they meet the company's minimum criteria.*

Quick Copy to a new Estimate or Sub-Estimate

Quick Copy

With this function, a duplicate of an existing template or estimate can easily be created. One way to use this feature is to create a master estimate with the standard items and then for each unique project use the quick copy to create an individual estimate that can be edited.

All lines are tagged to be copied to the new estimate or sub-estimate by default with the option to un-tag lines you do not want to be included.

Sub-estimates

Create multiple options for a client or project under one umbrella estimate. The sub-estimate keeps the same base estimate number and assigns each sub estimate a unique number (i.e. -0001 or -0002 etc). This allows for easy searching and filtering.

Examples of sub-estimate usage

- Property Management and New Home construction
 - With multiple floor plans for the same development, you can keep them all together and grouped by development, and have different sub-estimates for the elevation changes, or add on to a unit.
- Commercial or Residential sub-estimate
 - A client may want multiple estimates for the same unit, but for different materials. Each sub-estimate can be the variation, and this way you have record of all the different options the client had selected.

Overages

This feature creates and overage in order entry

What is an overage?

An overage is a secondary invoice tied to an order. This allows you to create two separate invoices with unique invoice numbers but have the orders tied together. This allows you to bill separately for an upgrade or to a different individual but still have the jobs tied together. By using the overage feature, you are able to have one workorder and picking ticket that can combine lines from both invoices onto one document. When you jobcost the original order, the overage will also be closed out too.

- To use this function the allowed and actual fields both must be filled out.
- If there is an amount in the actual field it will trigger a prompt when exporting to order entry to ask if an overage will need to be created. BidPro will take the allowed figures and create an invoice, and the actual fields will become the overage.
- If the option to create an overage is selected a screen will pop up to confirm existing information from Overage information on estimate or information can be edited to populate the Sold To information of the overage order.

Filters & Reports


Custom Filters

This screen allows you to control what estimates or templates appear in the list at any given time. Use this feature when you want to work with only a select group of records.

If you have a large number of bids on file, and the desired filter would result in very few of these records being displayed, there can be a lengthy delay as the records are being filtered.

Fields you can filter by:

- **Customer Name** - click on **F8** to select from the customer list.
- **Customer Zip** - zip code (not maintained in a list).
- **Project** - click **F8** for a project from the customer name entered on the estimate.
- **Project Zip** - the zip code entered on the project screen.
- **Model**
- **Salesperson** - click **F8** to select from the sales rep file.
- **Start & Ending Dates** - enter a date or press **F8** for calendar.
- **Store** - enter an existing store code or press **F8** to select from the store code list.

 **Notes:** Starting & Ending Dates are the dates as entered on the estimate. If you filter using a date an estimate with a blank date will not be included.

Example of Filter Uses:

To work with estimates for store code 2 only: leave all fields blank except for the store code field. Enter store code 2 and click OK.

To work with estimates for Project Name Windsong and only for sales rep Bob James: press **F8** at the project field and select Windsong. Press **F8** at the First Sales rep field and select Bob James from the list.

FUZZY SEARCH

A 'fuzzy' search can be performed in text fields by placing a % (percent sign) before the search text. Example: ABC will find all the text STARTING with ABC; while %ABC will find all text CONTAINING 'ABC'.



In order to improve performance, turn the filter off once it is no longer needed. Also you can purge bids that are of no further use, this will also improve the filtered display performance.

Estimates Report

Figure: Estimates Report Options

Cost to Print

$$\text{Total Unit} = \text{Unit Cost} + \text{Overhead}$$

Line #	Area	PC Style/Item	Color/Desc	Allowed	Actual	Over	Tot Unit Cost	GP%
1	LR	01 PROVINCIA 26 - 15	HONEY BEIGE	455.67	455.67	0.00	4.74	78.83
2	DR	01 PROVINCIA 26 - 15	HONEY BEIGE	358.56	358.56	0.00	4.74	78.83
3	BR1	01 PROVINCIA 26 - 15	HONEY BEIGE	448.20	448.20	0.00	4.74	78.83
4	CUT GROUP 4	01 PROVINCIA 26 - 15	HONEY BEIGE	896.40	896.40	0.00	4.74	78.83

$$\text{Line Cost} = (\text{Unit Cost} + \text{Overhead}) \times \text{Quantity}$$

Line #	Area	PC Style/Item	Color/Desc	Allowed	Actual	Over	Tot Line Cost	GP%
1	LR	01 PROVINCIA 26 - 15	HONEY BEIGE	455.67	455.67	0.00	96.45	78.83
2	DR	01 PROVINCIA 26 - 15	HONEY BEIGE	358.56	358.56	0.00	75.89	78.83
3	BR1	01 PROVINCIA 26 - 15	HONEY BEIGE	448.20	448.20	0.00	94.87	78.83
4	CUT GROUP 4	01 PROVINCIA 26 - 15	HONEY BEIGE	896.40	896.40	0.00	189.73	78.83

Estimates Profitability Report

This report added in version 10.5.6 has a detailed listing of estimate line information for both actual and allowed fields as well as summary information for estimates, with subtotalling and a profit/cost bar graph (see example circled in red). This report prints on legal sized Paper.

Estimate Profitability Report (Legal Size)

Sort by:
 Estimate Number Salesperson Model
 Store/Estimate Number Store/Salesperson Estimate Total

Print:
 Estimates Only Both
 Templates Only

Sort lines by:
 Line Number
 Area
 Product Code
 Style/Item Name
 Total

Filter by:
Estimate # From: Cust Name:
Estimate # To: Cust City:
Model: Cust Zip:
Job Number: Proj Name:
Overage Name: Proj City:
 Exported Un-exported Both Proj Zip:

Dates:
Estimate Date From: 01/01/80 F8
Estimate Date To: 12/31/79 F8
Est. Starting Date From: 01/01/80 F8
Est. Starting Date To: 12/31/79 F8
 Include blank starting dates
Est. Completion Date From: 01/01/80 F8
Est. Completion Date To: 12/31/79 F8
 Include blank ending dates

Stores:
 032
 049
 065
 095
 100
 200
 300
 400
 500
 600
 601

Options:
 Print Line details
 Print Subtotals
 Page break after estimates
 Page break after subtotals
 Print Preview
Copies: 1
Printer: Adobe PDF

Sales People:
 BEN
 CAROLYN
 DON
 GORDON
 HOUSE
 JEFF THOMPSON
 JOHN G.
 LEWIS
 MARK
 MICHAEL
 MIKE
 MORGAN
 NANCY SMITH
 NAOMI
 SCOTT
 STEPHEN
 TERRY E
 TERRY SANFORD
 TERRY WHEAT

0% Completed

Print Cancel

Information
Note: This report requires LEGAL size paper and prints in landscape mode.
OK

Page 1 Estimate Profitability Listing Estimates and Templates Report Sorted by Estimate Number Lines Sorted by Line Number (**** indicates zero cost line) 5/21/2010

Estimate #	Store	Customer Information	Project Information	Overage Information	Misc									
*STEVE -901	032	TEBNER	TEBNER	1641 N. MCFARLAND BLVD. SUITE A-1 TUSCALOOSA AL 35406	Type: Estimate Model: T Sales: NADMI									
Est. Date	02/18/10			Last Export to OE: 02/18/10	User Header Label 1									
Start Date				Times Exported: 3	User Header Label 2									
Completion Date				Customer Type: COMMERCIAL										
Estimate Total	\$128.30	Misc Charges	\$0.00											
Material Cost	\$6.20	Sales Tax	\$9.50											
Service Cost	0.00	Misc Tax	\$0.00											
		GP Percent	20.32											
C O S T : 79.68%					P R O F I T : 20.32%									
Line #	Area	PC Style/Item	Color/Desc	Line Total	Total Line Cost	Material & Service Cost	Qty	Total Freight	Total Load	Total Use Tax	Total OH	OH%	GP%	Over
1	BATH 1	01 ABA 7000	RED	ALLOWED: 59.40	43.13	42.60	6.67	0.000	0.000	0.00	0.53	10.0000	20.00	0.00
	User Line Label 1		User Line Label 2	ACTUAL: 59.40	43.13	42.60	6.67	0.000	0.000	0.00	0.53	10.0000	20.00	0.00
2	BATH 1	01 ABA 7000	BLUE	ALLOWED: 59.40	43.13	42.60	6.67	0.000	0.000	0.00	0.53	10.0000	20.00	0.00
	User Line Label 1		User Line Label 2	ACTUAL: 59.40	43.13	42.60	6.67	0.000	0.000	0.00	0.53	10.0000	20.00	0.00
Line totals				2 Lines	ALLOWED: \$118.80	\$86.25								\$0.00
					ACTUAL: \$118.80	\$86.25								
200	-901	032	RAMEY CONSTRUCTION, BEN RT. 9, BOX 92 TUSCALOOSA AL 35406	PRUET, ARTHUR 2113 LURLEN WALLACE BLVD NORTHPORT AL	PRUET, ARTHUR 1641 N. MCFARLAND BLVD. SUITE A-1 TUSCALOOSA AL 35406	Type: Estimate Model: 222 Sales: NANCY SMITH TERRY WHEAT								
Est. Date	06/15/09				Last Export to OE: 06/15/09	User Header Label 1								
Start Date	06/15/09				Times Exported: 3	User Header Label 2								
Completion Date	06/16/09				Customer Type: COMMERCIAL									
Estimate Total	\$790.12	Misc Charges	\$0.00											
Material Cost	414.43	Sales Tax	\$60.26											
Service Cost	0.00	Misc Tax	\$60.26											
		GP Percent	36.14											
C O S T : 63.86%					P R O F I T : 36.14%									
Line #	Area	PC Style/Item	Color/Desc	Line Total	Total Line Cost	Material & Service Cost	Qty	Total Freight	Total Load	Total Use Tax	Total OH	OH%	GP%	Over
1	ALL CPT AREAS	01 EXACTA- INV	MINERAL GREEN	ALLOWED: 610.94	427.63	414.43	29.33	13.199	0.000	0.00	0.00	0.0000	30.00	
	User Line Label 1	LABEL 3	User Line Label 2 LABEL 4	ACTUAL: 669.60	427.63	414.43	29.33	13.199	0.000	0.00	0.00	0.0000	36.14	59.66
Line totals				1 Lines	ALLOWED: \$610.94	\$427.63								\$59.66
					ACTUAL: \$669.60	\$427.63								

Figure: Estimate Profitability Report Sample

Exported Estimates Report

This new report added in Version 10.5.5 gives the export history of estimates and is similar to the export report for current estimates. This report will not track previous history but will start from this update forward.

Exported Estimates Report

Sort by:
 Estimate Number Sales person Model Invoice # Export Date
 Store/Estimate Number Store/Salesperson Estimate total Store/Invoice # Store/Export Date

Sort lines by:
 Line Number
 Area
 Product Code
 Style/Item Name
 Total

Filter by:
 Invoice # From: Cust Name:
 Invoice # To: Cust City:
 Estimate # From: Cust Zip:
 Estimate # To: Proj Name:
 Model: Proj City:
 Job #: Proj Zip:
 Overage Name:

Dates:
 Export Date From: 01/01/80 F8
 Export Date To: 12/31/79 F8
 Estimate Date From: 01/01/80 F8
 Estimate Date To: 12/31/79 F8

Stores:
 100
 200
 300
 900

Options:
 Print Line details
 Print Subtotals
 Page break after subtotals
 Print Preview Copies
 Printer: Adobe PDF

Sales People:
 BILLY THOMPSON
 CLARENCE PHIFER
 NANCY REGAN
 SALLY JONES

NOTE: Export history is only available from version 10.5.5.x forward

Print Cancel

Overage Analysis Report

This report was added to allow analysis of overage lines in estimates. It requires legal sized paper and prints in landscape mode. BidPro stores on the estimate line the product information assigned to a new line and displays it as 'Original Product' on the line edit screen. This information will not change even when product information is edited on the line. The original product information and original cost are now printed on the Overage Analysis report.

Overage Analysis

Sort by:
 Supplier/Style/Color/Qty
 PC/Style/Color
 Supplier/Style
 PC/Qty
 Overage Amount
 Line Total
 Salesperson
 Profit

Filter by:
 Estimate # From:
 Estimate # To:
 Model:
 Job Number:
 Overage Name:
 Exported Un-exported Both

Dates:
 Estimate Date From: 01/01/80 F8
 Estimate Date To: 12/31/79 F8
 Est. Starting Date From: 01/01/80 F8
 Est. Starting Date To: 12/31/79 F8
 Include blank starting dates
 Est. Completion Date From: 01/01/80 F8
 Est. Completion Date To: 12/31/79 F8
 Include blank ending dates

Stores:

Options:
 Print Subtotals
 Page break after subtotals
 Print Preview
 Copies: 1
 Printer: Adobe PDF

Print:
 Estimates Only
 Templates Only
 Both

Sales People:
 BEN
 CAROLYN
 DON
 FRED LOVE
 GORDON
 HOUSE
 JEFF THOMPSON
 JOHN G.
 LEWIS
 MARK
 MICHAEL
 MIKE
 NAOMI
 SCOTT
 TERRY E
 TERRY SANFORD
 TERRY WHEAT

PC	Description
01	CARPET
02	VINYL
03	AREA RUGS
04	CUSHION
05	WALL COVERING
06	CERAMIC
07	HARDWOOD
08	SUPPLIES
09	SUNDRIES & CL
10	IN STORE USE
11	VCT & COVEBAS
12	WINDOWS & DR
13	LAMINATES
14	SAMPLES
15	EVERGUARD
16	TOOLS
17	CARPET TILES
18	REMNANTS
19	** UNDEFINED *
20	** UNDEFINED *
21	** UNDEFINED *
22	** UNDEFINED *
23	** UNDEFINED *
24	** UNDEFINED *
25	** UNDEFINED *
26	** UNDEFINED *
27	** UNDEFINED *
28	** UNDEFINED *

Print Cancel

Figure: Estimate Overage Analysis Options

Estimate # / Store	Line #	PC	Style/Item / Supplier	Color/Desc / SalesPerson 1	Line Total	Total Line Cost	(Unit Cost)	Qty	Profit	Overage GP%	Overage Amount
TEST 0	1	1	01 ABANDON - 12' SHAW INDUSTRIES	ICED MINT HOUSE	1,030.05	1,093.50	14.91	66.67	-63.45	0.00	1,373.35
			<u>Original Product:</u> 01 ABANDON - 12'	<u>TEEPEE</u>		<u>Original Unit Cost:</u> 14.91					

Page 6 Estimate Overage Analysis
 Estimates and Templates
 Report Sorted by Supplier/Style/Color/Qty 6/22/2010

Estimate # / Store	Line #	PC	Style/Item / Supplier	Color/Desc / SalesPerson 1	Line Total	Total Line Cost	Qty	Profit	Overage GP%	Overage Amount
JE000161 32	1	1	08	TERRY E	17.00	18.53	4.00	-1.53		
			<u>Cust Name:</u> KYSER CONSTRUCTION	<u>Overage Name:</u>	<u>ALLOWED:</u> 24.76	<u>ACTUAL:</u> 18.53	4.00	6.23	25.20	7.76
			<u>Proj Name:</u> ***CREDIT HOLD***	<u>Model:</u> CAFETORIUM RENOVATIONS CA FREE						
Supplier:					Subtotal total number of lines: 1		Subtotal average profit: 25.20			
Style :					Subtotal allowed line totals: 17.00		Subtotal average line GP%: 25.20			
Color :					Subtotal actual line totals: 24.76		Subtotal overage amount: 7.76			

Figure: Estimate Overage Analysis Sample

Range Edit

[Utilities>Range Edit](#) or [File>Range Edit](#)

The ability to filter and edit Bid pro estimates or lines has been added. This allows for bulk changing for things like price changes or discontinued products.

Edit Lines

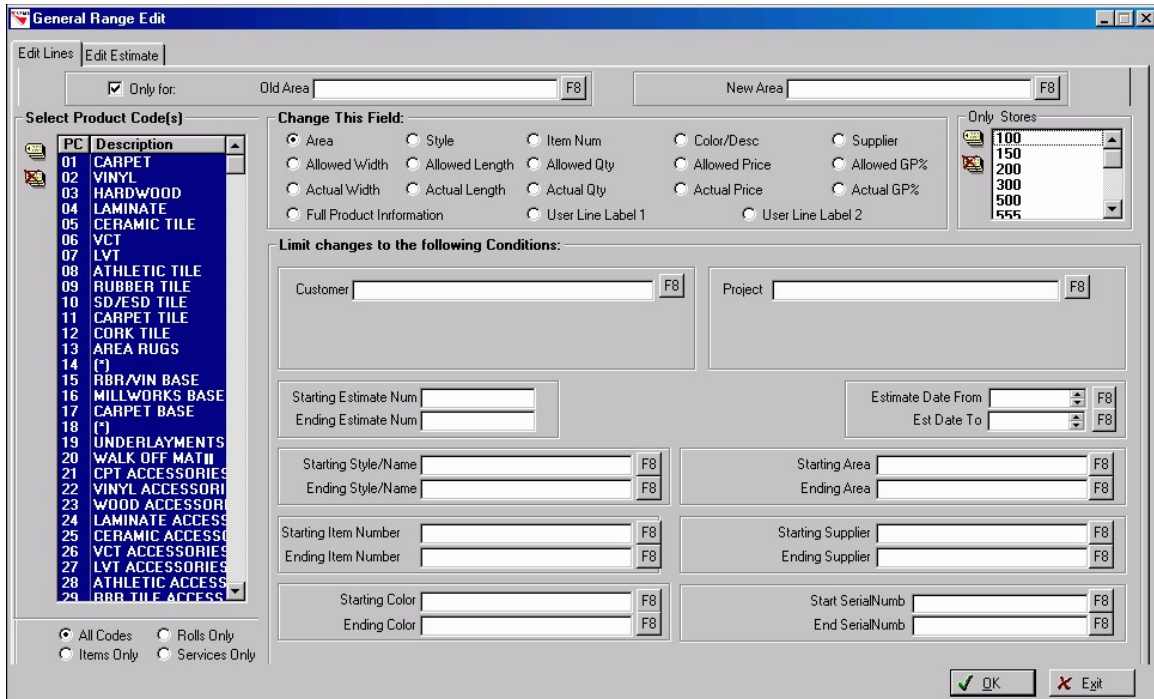


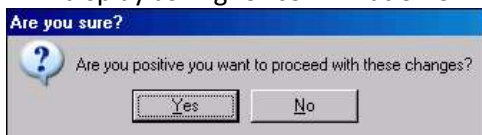
Figure: Range edit lines options

- Choose the **edit lines** tab to edit information on the estimate lines.
- Choose the field to change by clicking the option next to the field name. For example this is what displays if Item Number is chosen.

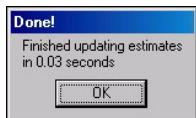


- Then choose other options to limit the lines which will be changed for example only estimates from a certain supplier. To clear any limiting information, click the **clear** button.
- If desired, enter limiting estimate dates so as not to include very old estimates.

A screen will display asking for confirmation of making the changes.



If yes is answered the changes will be applied and a box will display confirmation the changes have been made.



Edit Estimate

Figure: Range edit estimate options

- Choose the **edit estimate** tab to edit information on the estimate headers.
- Choose the field to change by clicking the option next to the field name. For example, this is what displays if salesperson is chosen.

Figure: Range edit estimate change salesperson 1

- Then choose other options to limit the estimates which will be changed for example only estimates with material from a certain project. To clear any limiting information, click the **clear** button. If desired, enter limiting estimate dates so as not to include very old estimates.
- Click the **preview estimates** button to see a listing of estimates which will be changed.

RFMS BidPro - [Preview Estimates that will be Changed]

File Edit Reports Utilities Window Help Navigator Mail

Estimate # Customer Project Model Salesperson 1 Salesperson 2

Search Estimate #

Store	Estimate #	Sub	Date	Customer Name	Project Name	MODEL	JOB #	Telephone	Salesperson 1	Salesperson 2
032	JE100049	001	05/17/10	ALLEN, CHERYL	EDWARDS, JACKIE	CASE 4850			BEN	
032	JE100051	001	07/13/10	ALLEN, CHERYL		03654		205-556-2693	BEN	
032	JE100093	001	09/13/10	ALLEN, CHERYL	BIG, FISH	TREX		205-996-8989	BEN	MIKE
032	JE100111	001	08/30/10	ALLEN, CHERYL	BIG, FISH	CASE 6457		205-996-8989	BEN	MIKE
032	JE100112	001	08/30/10	ALLEN, CHERYL	BIG, FISH	TREX		205-996-8989	BEN	MIKE
032	JE100179	001	10/04/10	ALLEN, CHERYL	BIG, FISH	TREX REGRESSION TEST		205-996-8989	BEN	MIKE
032	JE100184	001	10/07/10	ALLEN, CHERYL	BIG, FISH	TREX		205-996-8989	BEN	MIKE

If the previews list meets expectations, click ok. If not click **exit** and redo the options. A screen will display asking for confirmation of making the changes.

If yes is answered the changes will be applied and a box will display confirmation the changes have been made.