



Systems for Success

A large decorative graphic on the right side of the page, consisting of three overlapping, curved bands. The bottom band is black, the middle band is red, and the top band is light gray. The text 'BidPro User Guide' is positioned in the lower right area of the black band.

BidPro User Guide

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Overview

BidPro guides users through the bidding and estimating process by allowing the entry of estimates and estimate templates. Overhead and other factors can be used in the bidding process as well, and may be itemized or entered using a flat dollar amount or percentage. BidPro eliminates the inconvenience and drudgery of doing bidding by hand. With the tools that Bid-Pro provides, become a "bidding pro" right away! Quickly and easily set criteria using simple "point and click" commands, and finish bidding in a fraction of the time it previously took.

BidPro allows the use of Product information for estimating directly from the RFMS Products module. Finally, BidPro integrates with the RFMS Order Entry module, allowing an estimate or template to become a live customer order with the click of one button. BidPro also utilizes the RFMS **customer** file and **credit check** features.

About this User Guide

This user guide assumes some basic knowledge of the Windows operating system and the RFMS for Windows programs. It is not necessary to have expert knowledge of RFMS, but some familiarity will assist the user in understanding the terminology used.

BidPro Terms

Estimate

Estimates are dynamic; they can be changed, edited and modified as many times as needed. In many cases BidPro can automatically make needed changes.

Overage

A secondary invoice tied to an original order. This allows creating two separate orders with unique order numbers. This allows billing an upgrade to a separate customer. They share the same set of order lines thus will have a shared work order and picking ticket. When the original invoice is job costed, the overage will be jobcosted also.

Template

Templates are usually locked down to prevent accidental changing; when an estimate is initially created it can be created as a template or an existing estimate can be made into a template. Examples of uses of templates are property management and new home construction plans where material and measurements stay the same.

Accessing the Software

From the Main Navigator Screen, Click the **Bid-Pro** button



BidPro can be set to automatically go to the browse screen by setting *Utilities>System Options>BidPro>BidPro>automatically open estimate browse on startup* to yes.

System Options

Utilities>System Options>BidPro

These screens allow customization of Bid-Pro.



Notes:

Some options will not change until exiting and restarting BidPro.

BidPro

Utilities>System Options>BidPro>BidPro

Configuration

Allow Multiple Exports of Templates/Estimates

Type-Can be Global, Assigned or User

With this option set to no, a Template or Estimate can be exported only one time.

Default Values

Exported line Status

Type-Can be Global, Assigned or User

This option determines what the default line status will be in exported order entry line.

Interface

Automatically open estimate browse on startup

Type-Can be Global, Assigned or User

If this is set to no, it will be necessary to go to *File>Estimates* first to get to the browse screen.

Automatically tag all lines when exporting to Order Entry

Type-Can be Global, Assigned or User

Set this option to yes if most of the time all lines are exported rather than just a few lines.

During Export and Append, Ignore price difference and average prices

Type-Can be Global, Assigned or User

Set this option to yes to allow overriding price differences on identical lines when exporting. The Average price will be used.

During Export combine and append to similar lines (Line Notes will be lost)

Type-Can be Global, Assigned or User

Set this option to yes to combine similar lines upon export. *Line notes will be lost when using this option.*

Export Custom Message to Orders

Type- Must be Global 🚫

Set defaults for the exporting of messages to Order Entry from an estimate. Set this option to yes to automatically export the estimate custom message to the ORDER custom message in Order Entry.

Export Custom Message to Work Orders

Type- Must be Global 

Set this option to yes to export the estimate custom message to the WORK ORDER custom message in Order Entry. The option "Use Work Orders" must be set in [Utilities>System Options>Order Entry>Work Orders>Use Work Orders](#)

Export estimate and line attachments to Order Entry

Type-Can be Global, Assigned or User

Set this option to yes to export the attachments from both the lines and the estimate.

Export Line Notes to Order Entry Lines

Type- Must be Global 

Set this option to yes to transfer line notes from the estimate to the lines on the customer order.

Export Line Notes to Work Order Lines

Type- Must be Global 

Set defaults for the exporting of notes to Order Entry from an estimate. Set this option to yes to automatically export all notes that were entered on the estimate lines to the WORK ORDER lines in Order Entry. The option "Use Work Orders" must be set in [Utilities>System Options>Order Entry>Work Orders>Use Work Orders](#)

Estimates/Templates

[Utilities>System Options>BidPro>Estimates/Templates](#)

Configuration

Allow unreferenced estimate lines always (override system settings)

Type-Can be Global, Assigned or User

Set this option to yes to allow unreferenced lines. This option must be set to yes to allow unreferenced lines in BidPro but not in Order Entry.

Auto Update Actual (By default, all estimate lines will be set to use actual figures only.)

Type- Must be Global 

Set this option to yes to auto copy the allowed figures into the actual figures if the actual figures are left blank.

These next two options work in tandem.

Automatically resolve sell quantities on a line by line basis

Type-Can be Global, Assigned or User

This option refers to the field found on the product record labeled "**Sell To Quantity**". With this option set to yes, if values are entered in that field and a selling amount is entered on the order that does not agree, the quantity will automatically be converted to the sell quantity.

If auto-resolve sell qty not set, prompt to resolve sell quantities

Type-Can be Global, Assigned or User

This option refers to the field found on the product record labeled "Sell To Quantity". With this option set to yes, if values are entered in that field and a selling amount is entered on the order that does not agree, a prompt will be given to round to the next logical selling quantity.

If neither option is set to yes, whenever a discrepancy occurs, the warning message will not appear and the system will not automatically make the correction leaving the quantity as it was entered.

Default Cost for Roll Goods

Type-Can be Global, Assigned or User

Choose either cut or roll cost.



Notes:

Changing this option can cause display issues on the estimate browse. The current real cost displayed will be based on this setting-if estimates were entered with the opposite setting, the cost may not match. For example, if the line was entered with a default cost of CUT then the option is changed to ROLL the cost comparison may not be valid.

Require Customers to be in Customer File

Type- Must be Global 🔒

Set this option to yes to require that the Estimate or Template customer be pulled from the RFMS Customer file.

With the Revised 11.2 update, Bidpro, now follows the system option in Order Entry to require a zip code on the customer information.

Require Line Area to be in Area file

Type- Must be Global 🔒

This check box requires that all areas must be imported from Order Entry Area file rather than typed in.

Require Overage Customers to be in Customer File

Type- Must be Global 🔒

Set this option to yes to require that the overage customer be pulled from the RFMS Customer file.

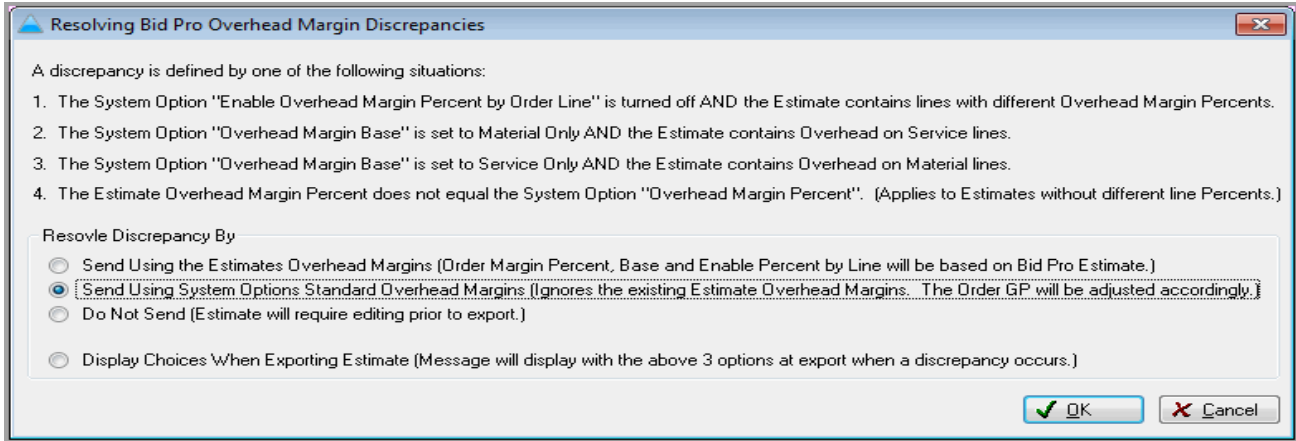
Require Project Customers to be in Customer File

Type- Must be Global 🔒

Set this option to yes to require that the project customer be pulled from the RFMS Customer file.

Resolving BidPro Overhead Margin Discrepancies

Type- Must be Global 🔒



If the Display Choices option is not selected then, a message will not be displayed when exporting to Order Entry.

Some BidPro Users run from Citrix or Terminal Server

Type- Must be Global

Set this option to yes for users on Citrix or Terminal Server. This prompts the system to address some display issues that these users may have with record selection.

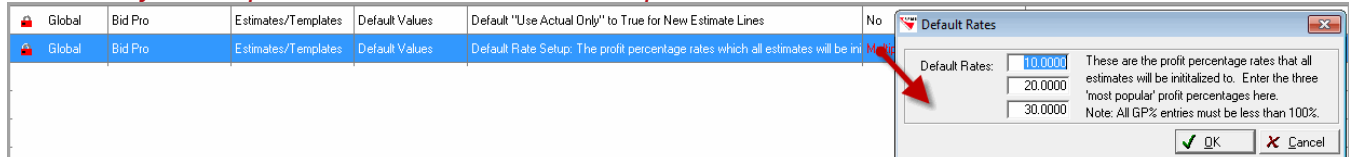
Use GST Inclusive Tax:

Type-Can be Global, Assigned or User

Set this option to yes if GST is included in product prices. This only applies to Sales Tax. This option is only available for Australian clients.

Default Values

Utilities>System Options>BidPro>Estimates/Templates>



Default "Use Actual Only" to True for New Estimate Lines

Type- Must be Global

Set this option to yes to default estimate lines to actual only. Override this setting on the line itself by un-checking the Actual Only box that is present on the line.



Notes:

If a bid is created by a user that does not have that option set it would display both actual and allowed even when opened by a user that does have the option set.

Default Rate Setup:

Type- Must be Global

When entering estimates or templates, three default profit percentages display. This is where those default rates are set. Click on one of the three rates to calculate profit for lines as they are entered. The rate can be manually changed on each line, these default rates should be the three most often used rates.

Display

Display unreferenced lines in red

Type-Can be Global, Assigned or User

If this option is set to yes, any unreferenced lines (ones not coming from Products or Inventory) will show in red.

Hide “Original Product Info” on line edit screen

Type-Can be Global, Assigned or User

This option was added in version 10.6.1 to hide the original information display on the edit line screen which was added in version 10.6.

Hide Cost

Type-Can be Global, Assigned or User

Setting this option to yes will hide the cost.

Hide Prices

Type-Can be Global, Assigned or User

Setting this option to yes will hide the prices.

Show Gross Profit on Estimate

Type- Must be Global 

Set this option to yes to display the gross profit on the estimate.



Notes:

Overhead percent is now calculated to 4 decimal places. Gross profit calculations have been changed to match the formula used in order entry. Previously, there may have been slight differences between the two modules when an estimate was exported to order entry. These changes may cause slight profit percentage changes in existing estimates.

Prompts

Job Number Prompt

Type-Can be Global, Assigned or User

Prints on the estimate; Used as a filter in Reports.

Model Prompt

Type-Can be Global, Assigned or User

Prints on the estimate; Used as a filter in Reports; Used as a filter for searches.

User definable Field Estimate Header

Type-Can be Global, Assigned or User

Shows on Estimate Browse Screen Display, can click on the heading and sort by these fields or use Ctrl-S and Search by these fields.

User definable Field Estimate Lines

Type-Can be Global, Assigned or User

Shows on Estimate Line Browse Screen Display, can click on the heading and sort by these fields or use Ctrl-S and Search by these fields.

Reporting

Default Estimate Printing Configuration

Type-Can be Global, Assigned or User

Use this only if for a custom Estimate. Click on the ellipsis Browse button. Select the file to use.

Don't prompt for configuration printer program

Type-Can be Global, Assigned or User

Select this option to have a default configuration program while printing. To have the system "prompt" to choose a configuration program, do not set this option to yes.

Estimate Name

Type- Must be Global 🚫

Prints on the estimate; Used as a filter in Reports.

Order Entry

Lock Order Entry Lines when Exporting from BidPro

Type-Global, Assigned or User

This system option give the ability to lock or not lock exported lines. The values to choose from are

- Never Lock,
- Always Lock Total
- Lock Total if BidPro Line Total Locked
- Always Lock Price
- Lock Price if BidPro Line Total Locked.

Utilities

Calclator F2Key

Utilities>Calclator

This functions the same as in order entry

Contract Pricing

Utilities>Contract Pricing

If this menu option is available, it takes the user to the contract pricing module.

RFMS Contract Pricing gives dealers the ability to set contractual prices for customers and properties.

Range Edit

Utilities>Range Edit or File>Range Edit

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

Edit Estimate

The screenshot shows the 'Edit Estimate' dialog box with the following elements:

- Tabbed Interface:** 'Edit Lines' and 'Edit Estimate' tabs.
- New Customer:** Input fields for name, Tele 1, and Tele 2.
- Change this field:** Radio buttons for Customer (selected), Project, Overage, Model, Salesperson 1, Salesperson 2, Job Name, Job Phone, Job #, Customer Tele 1, Customer Tele 2, and two user-definable header labels.
- Limit changes to the following Conditions:** Fields for Customer, Project, Starting Estimate Num, Ending Estimate Num, Estimate Date From, Est Date To, and Model.
- Only Stores:** A list box containing 032, 049, 065, and 075.
- Buttons:** 'Preview Estimates', 'OK', and 'Exit'.

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.

This screenshot shows the 'Change this field' section with 'Salesperson 1' selected. The 'Only for:' field is set to 'Old Salesperson 1' with the value 'BEN'. The 'New Salesperson 1' field is set to 'DON'. The 'Only Stores' list is visible on the right.

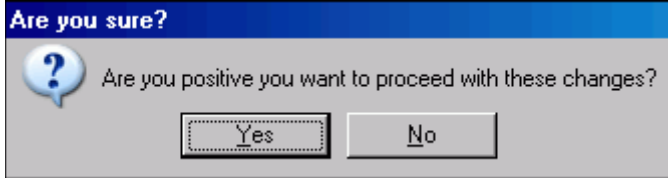
Figure: Range edit estimate change salesperson 1

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.

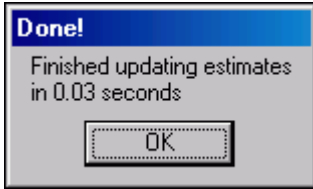
Click the **preview estimates** button to see a listing of estimates which will be changed.

Store	Estimate #	Sub	Date	Customer Name	Project Name	MODEL	JOB #	Telephone	Salesperson 1	Salesperson 2
032	JE100048	001	05/17/10	ALLEN, CHERYL	EDWARDS, JACKIE	CASE 4850			BEN	
032	JE100061	001	07/13/10	ALLEN, CHERYL		09854		205-556-2693	BEN	
032	JE100093	001	08/13/10	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.



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.

Update Contract Pricing

Utilities>Update Contract Pricing

The ability to update existing estimates to the current contract pricing for a customer can be found under the Utilities dropdown.

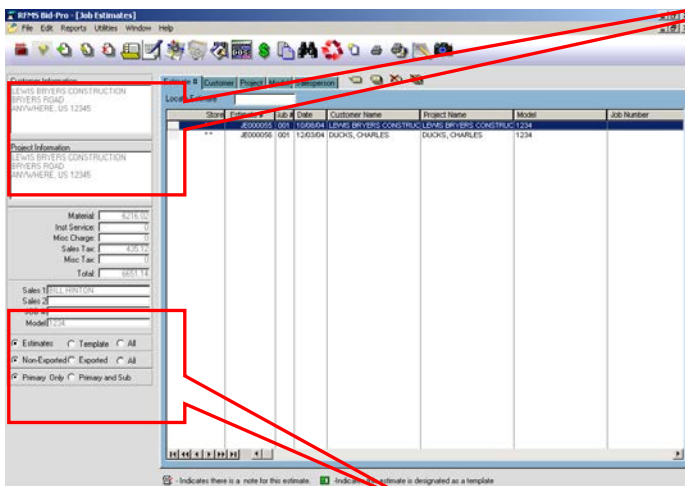
Estimates can be filtered for update by Estimate Date, Start Date, End Date, Templates, Locked Status and Exported Status.

Figure Update Contract Pricing Filter Screen


Estimate Browse Screen

The system can be set to automatically go to the browse screen by setting *Utilities>System Options>BidPro>BidPro>automatically open estimate browse on startup* to yes or go to *File>Estimates*.

This screen displays estimates, sub-estimates and templates. It is where most of the processing in Bid-Pro occurs. The top area of the screen is the toolbar that allows access to specific functions. The middle section is a listing of current estimates and templates. The far right area of the screen displays information about the currently highlighted estimate.



To the right of the estimate listings, buttons are available that allow controlling the types of estimates or templates that will appear in the list (without applying a custom filter). Click on one of the buttons to apply. View estimates only or templates only. Only estimates that have been exported to Order Entry

can be displayed, or view only primary estimates, hiding all sub-estimates. Whenever one of these options is set to filter out information the find button on the tool bar will turn blue. 

Browse Column Headings and Tabs



Store	Estimate #	Sub	Date	Customer Name	Project Name	Model	Job Number	Telephone	Salesperson 1	Salesperson 2	Estimate Total	User 1	User 2
100	090623	001	06/24/09	LAW, JOHN	LAW, JOHN	MODEL		4125559854	SALLY JONES		\$0.00		
200	JE000001	001	06/24/09	JONES, BOB	JONES, BOB	A		2095556384	SALLY JONES		\$2,704.83		
200		002	06/24/09	JONES, BOB	JONES, BOB	A		2095556384	SALLY JONES		\$2,704.83		
200		003	06/24/09	JONES, BOB	JONES, BOB	A		2095556384	SALLY JONES		\$2,704.83		
100	JE000003	001	06/25/09	JONES, BOB	JONES, BOB	A		2095556384	SALLY JONES		\$0.00		
100	JE000004	001	06/30/09	LAW, JOHN	LAW, JOHN	MODEL		1111	SALLY JONES		\$0.00		
100	JE000002	001	06/25/09	APPLEBEES	APPLEBEES	MODEL		3335658777	SALLY JONES	NANCY REGAN	\$5,827.50		


Tabs

Clicking on one of the tabs first sorts the list by that tab and allows entering information in the blank and search by that field.

Browse Estimate Fields

Indicator Icons

 - Indicates there is a Note for this Estimate.  - Indicates this Estimate is designated as a Template

 Indicates there is a file attached to that estimate.

Estimate

This field displays the estimate or template number.

Sub

This field displays the sub-estimate number. The primary estimate or template will show the estimate number and sub # as 001, i.e., JE49899 001

An estimate or template with sub-estimates will display like this:

- JE49899 001 (original)
- 002 (sub-estimate)
- 003 (sub-estimate)

Date Estimate Date

The labels for these column headings are user defined in system options.

- Model
- Job Number
- User 1
- User 2

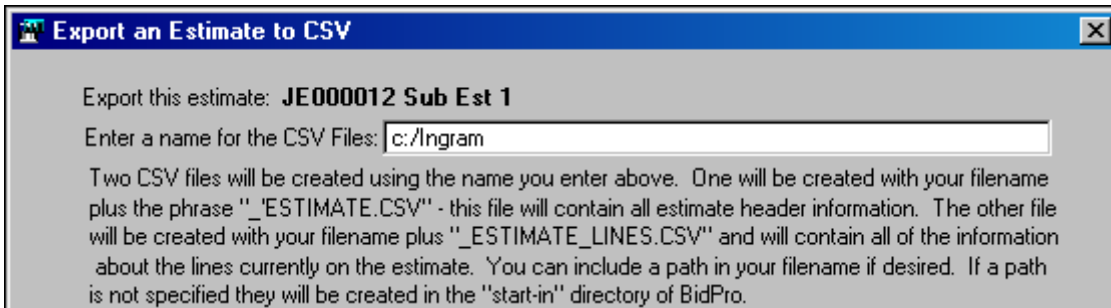
All other information is pulled from the estimate.

Export to .CSV

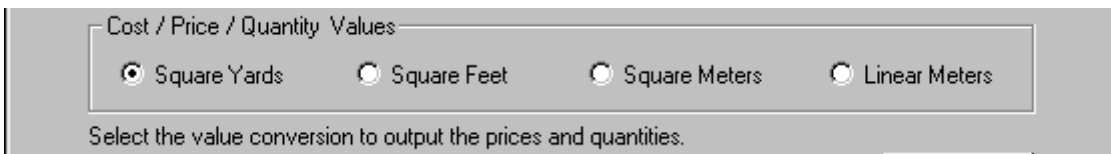
BidPro has the ability to export an estimate or multiple estimates to a .csv file to allow customized bid formatting. From the BidPro browse list, **tag** the estimate(s) to export. Then click the **export** button.



This brings up the Export dialog box. Enter the name of the .csv file. The location for saving the file can also be entered. The file below will be saved to the "C" drive.



Select the value conversions to output the prices and quantities.



Then click export.

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







One has the estimate header information and the other has the line information.

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

The Estimate Toolbar

	Exit	Exits the Estimate Browse screen.
	Select	Activates or selects the highlighted record.
	Insert	Adds a new customer estimate.
	Edit	Allows changes to the highlighted estimate or template.
	Delete	Deletes the highlighted estimate or template.
	Tag One	Tags a single estimate at a time
	Tag All	Tags all estimates at one time
	Un-Tag One	Un-tags a single estimate at a time
	Un-Tag All	Un-tags all estimates at one time
	View Lines	Displays all lines on the highlighted estimate or template.
	Notes	Estimate Notes

	Designate as Template	Allows saving highlighted estimate as a template.
	Copy Utilities	Allows estimates to be copied to new estimates or to sub-estimates. Also, Export Templates.
	Export to Order Entry	Creates a customer order in Order Entry using the information from the highlighted estimate or template.
	Export to csv	Exports the highlighted bid to two .csv files.
	Purge Bids	A maintenance routine to remove estimates.
	Update Costs	Updates Product or Service costs and load from the corresponding Product record for the estimates or templates that are currently tagged.
	Print Estimate	Prints the highlighted estimate.
	Print Groupings	Allows estimates to be printed using pre-defined groups.
	Cover Page Edit	Can be used to creates a RTF cover page and signature line for estimates.

	Attachment	Attach files to lines or entire estimates.
	Find	Allows the estimate display screen to be customized for viewing using specific search criteria.
	Clear Find	Resets the estimate display back to viewing all estimates and templates.
	RFMS Interoffice Mail	Access the RFMS interoffice mail system
	Client Management	Accesses the RFMS CMM module
	Tracking	Click to view the tracking record created when entering or appending an estimate or sub-estimate If gray, no records are present.

Order Tracking

Bidpro>Tracking button 

When an estimate or sub-estimate is created or appended, a tracking record is created. Click the **tracking** button to see the details.

If an estimate is exported to a new order with a new overage, then 3 tracking records will be created. Export BidPro to New Order, Export BidPro Overage to New Overage Order, Create New Overage for Order.

If an estimate is exported to an existing order and a new overage is created for the existing order then 3 tracking records will be created. Export BidPro to Existing Order, Export BidPro Overage to New Overage Order, Create New Overage for Order.

If an estimate is exported to an existing order and to an existing overage, then 2 tracking records will be created. Export BidPro to Existing Order, Export BidPro Overage to Existing Overage Order.

Insert/Edit Estimate or Template

To get here either add a new estimate/template or edit an existing estimate/template. From here, lines of products can be added to the estimate/template, gross profit percentages changed and more.

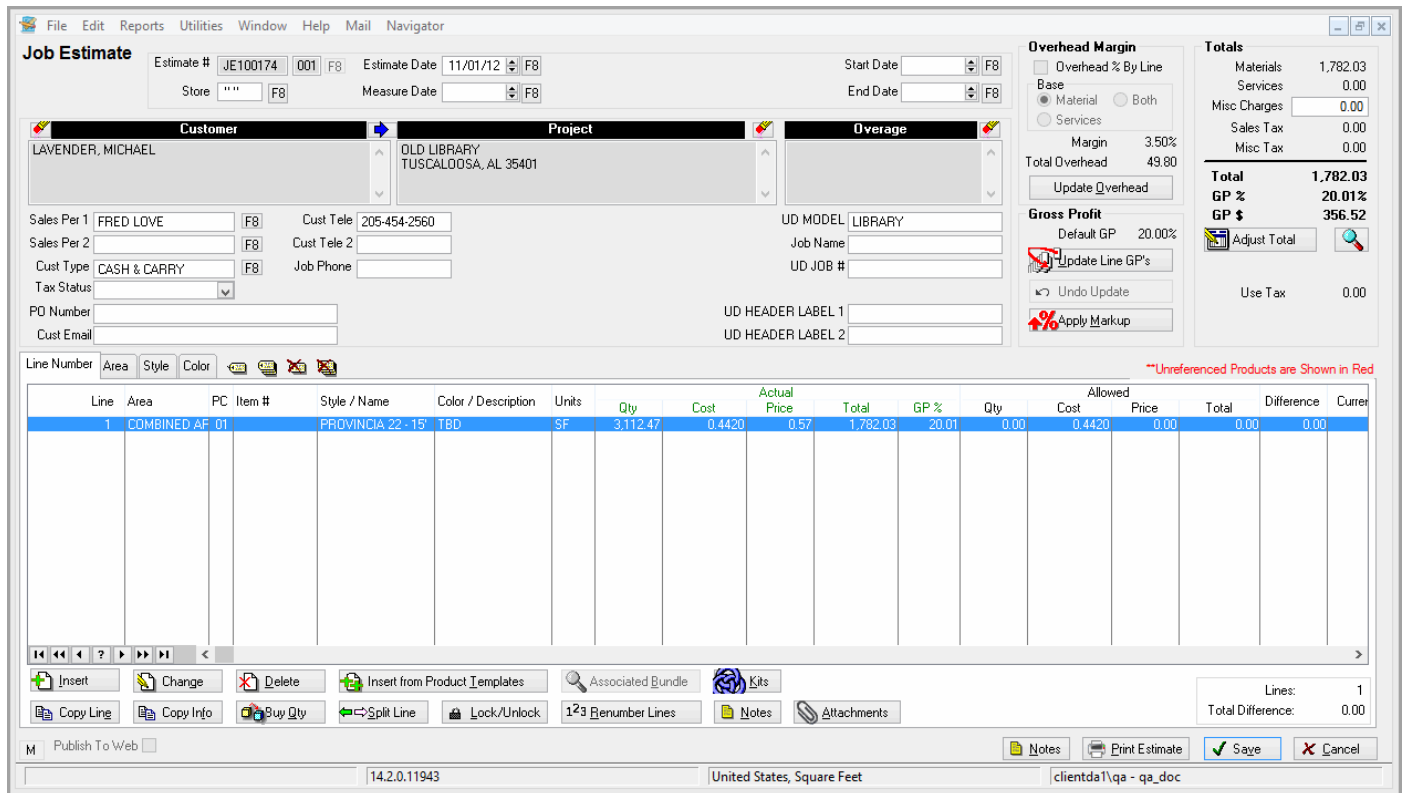
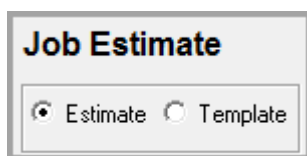


Figure BidPro Estimate Screen

First click in the circle next to either Estimate or Template.



The following field explanations detail each area of the estimate:

Estimate Number (Required)

Tab or Press F8 for a computer generated number, or type in a number. One suggestion is to use alphabetical characters in the number for easy identification of quotes, i.e., subdivision name followed by number (WS100 for Windsong).



Notes:

In RFMS Order Entry, if the option is set (in system options) to only use Computer Generated invoices numbers; only computer generated estimate/template numbers may be used in Bid-Pro.

Lock

Version 17.0



This applies to templates only. A template can be locked so that changes cannot be made. A copy must be made first to allow edits to be made.

Dates

Estimate Date (Required)

Enter the estimate date. Press D for today's date, or press **F8** to select a date from the On-Line calendar. (See details below) This date is used as framing parameters for the Salesperson Estimate Analysis report and is used for aging on the Bid Aging Analysis report.

The next three dates are not required.

Start Date

Enter the date the job would begin.

Completion Date

Enter the date the job is estimated to be completed. The completion date must be equal to or later than the Start date.

Measure Date

The date that is set for the room/rooms to be measured.

On-Line Calendar

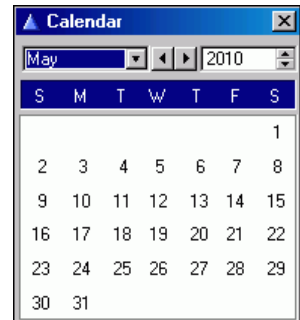
The on-line calendar allows easily entering dates. Pressing the **F8** key at date fields throughout the program accesses the calendar.

Using the calendar:

Month: Click the down arrow to change the month.

Year: Click the up or down arrow to change the year.

Day: Click a day of the month to select. The system date will be shown in red. Clicking on a day will insert that date into the field.



Store Number (Required)

Press **F8** to select a store code. Store codes may not be modified here. To add or change a store code, go to [Order Entry>Utilities>Set Up>Stores](#)

Customer Name & Address (Required)

Single clicking in this field will display the customer Information screen. Customer information can be typed directly into the fields, but this will not add them into the RFMS customer list.

The screenshot shows the 'BidPro Customer Import' window. It has a 'Customer Information' tab. The 'Sold To' section includes fields for Customer # (dropdown with 'N/A'), First Name, Last Name (with an 'F8' key indicator), Address #1, Address #2, City (with an 'F8' key indicator), State, Zip, and County. The 'Ship To' section includes fields for First Name, Last Name (with an 'F8' key indicator), Address #1, Address #2, City (with an 'F8' key indicator), State, Zip (with a 'Clear' button), and County (with a 'Copy' button). At the bottom are 'Export', 'OK', and 'Cancel' buttons.

Customer Lookup

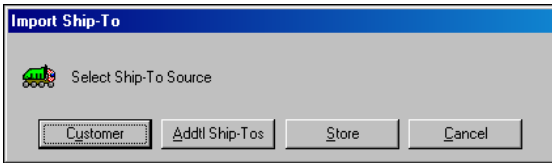
Hit the F8 key in the sold to information to bring up the RFMS customer list showing the existing customer records in the file. Search for customers by typing in a few characters of the last name and press the **TAB** key. Double-click a customer name to export the name into the estimate.

Also click on the insert button to add a new customer into the customer list and then import it into the bid. The Customer Ship To information if listed will be pulled into the Bidpro Project information.

The screenshot shows the 'Browse the Customer File' window. It has a search bar for 'Customer Name' and a 'Filter: Inactive' button. A list of customers is shown with columns for 'Customer Name' and 'Telephone'. The 'Sold To' and 'Ship To' fields are populated with information for 'A CARPET COMPANY'. The 'Work' and 'Cell' phone numbers are also visible.

Customer Name	Telephone
A CARPET COMPANY	222-222-222
ACME HOME BUILDERS	555-445-876
ACME PROPERTIES	222-222-222
ATLANTIC PROPERTY MGMT	555-554-897
BETTER HOMES CONSTRUCTION	205-555-905
BRANCH ONE, JERRY JACKSON	
BRANCH THREE, JERRY JACKSON	
BRANCH TWO, JERRY JACKSON	
CASH & CARRY	
Cauchon	
CHANEL, BRUCE	454-545-877
COCHRAN, MARSHA	555-555-555
DAVIDSON, DAVID	
DESIGNER, JANET	
DESIGNS BY EM	
DOUGH, JANE	111-111-111
GREEN, AMANDA	
JACKSON, JERRY	555-555-454
JOHNSON BUILDERS	555-555-555
JOHNSON, ABIGAIL	555-654-888

To use the Additional Ship to File Hit the F8 Key in the Ship To section and you will receive a box prompting you to choose a location for the Ship to address:



Customer: Pulls from the RFMS Customer file.

Additional Ship Tos: allows you to pull the address from Additional Ship to Addresses you have added to customer records. For example, the sold to may be a builder, with the main ship to the sub-division information and an Additional Ship to for each lot.

Store: Pulls from the list of stores, you might use this option on an order where a customer is purchasing from one store location and picking the material up from another store location.

You can enter a bid for prospects from CMM without having to make that prospect a customer.

Add the Quote or order as normal, then at the Customer List Browse click the Filter Icon .

On the custom filter screen check the box which says include CM Prospects.

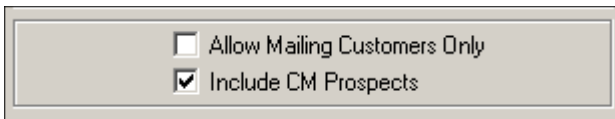



Figure Include CM Prospects

Prospects from CMM will now be included in the list and will be marked with a “P”.

HIGH CHALET			325-894-7824	22		Standalone	HIGH CHALET	100
INGRAM, JOSH		P		9	MCDONALDS RESTAURANT	Standalone	INGRAM, JOSH	100
JAMES, GERALD			987-555-5555	7	VANTAGE ARCHITECTS	Standalone	JAMES, GERALD	100
JONES, BOB			205-555-6984	17	DREAMLAND BBQ	Standalone	JONES, BOB	100

Figure Browse the Customer File

Project Name & Address (Required)

If the project name and address are not the same as the customer ship to name and address, single click in the project name area to add project name and address information for this quote. You can click on the eraser  to clear the information. The project information is not kept in a master list; it is specific to this quote only.

Overage Information

The Overage Info button allows entering Overage Customer Name and address while entering the estimate. Enter the appropriate Overage Customer Information.

Customer Telephone 1 & 2

This pulls from the customer file, but you can manually overwrite this information. This does not print on the estimate

Model (Required)

This label is user definable. The model field can contain up to 30 alphanumeric characters and is a **required** field. Search for an estimate using the Model field. The Model data prints on the estimate. This information is exported to order entry.

Salespeople

Up to two salespeople can be entered for the estimate. Click on the **F8** button to select a salesperson from the Sales Representative file that is used in Order Entry. If the customer name has an assigned salesperson entered in the customer file, that name will be displayed.

Customer Type

This information is required and is pulled from the RFMS Customer Type list.

Job Supervisor Name & Phone Number

Enter the name and phone number for the job supervisor, if applicable. These are not required fields and are not used in either reporting or searching.

Job Number

This label is user definable. A job number can be up to 30 alphanumeric characters and is optional. The job number will print on the estimate.

User Header Labels

These show here and on the estimate browse screen. Define what they are called in *Utilities>System Options>BidPro>Estimates/Templates> User definable field Estimate Header #1 and User definable field Estimate Header #2.*

Tax Status

This drop down menu includes Taxable, Exempt and Resale.



Notes:

The following choices have been added for Canada

- GST Exempt
- PST Exempt
- All Exempt

Estimate line entry screen for tax exempt estimates shows what the use tax would be if the estimate was not tax exempt. Note that this is NOT included in the cost calculated for that estimate and is only present for informational purposes.

PO Number

The purchase order number being used for this job.

Customer Email

Not required

Publish to Web

Customer's draft options for Property Connect are initially created as a BidPro estimate or sub-estimate, optionally using contract pricing. A draft is made available for web ordering by checking the **publish to web** box. This option is not available if the customer is not pulled from the customer file.

Gross Profit Percentages

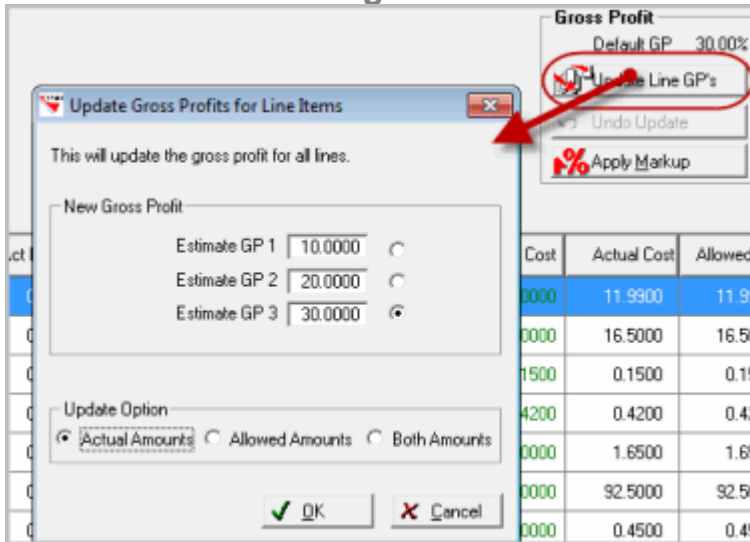


Figure: Update Line GP%

Up to three profit percentages can be used to calculate profit for each estimate. Default percentages are entered on the **general options** screen found in **system settings**. Click the option next to one of the percentages shown to select it for this estimate, or click inside one of the percentage fields and manually enter an alternative percentage amount. Manual changes apply to this estimate only and are not carried over to other estimates.

The feature allows applying the selected gross profit percentage that is selected on the estimate to all existing lines or only those lines that are tagged. This function would be helpful if, for example, a different percentage rate was entered for all of the lines. Then, it was decided to apply the same percentage rate to all of the lines. Instead of editing each line individually, click on the Apply button to change the GP% rate on all lines to the rate that is selected on the estimate.

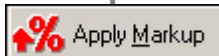
Opt to change the Actual, Allowed or both. This will not update Locked Allowed or Actual. The Lock/Unlock Tool can be used to unlock all lines first.

Some clients opt to leave prices set at 0 then apply a gross profit percent when a price quote is needed.

Undo Update

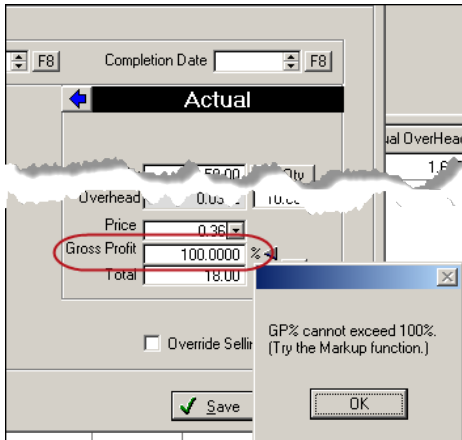
Once an update has been applied the Undo Update button becomes available. This will undo the change for the tagged lines only.

Markup



Many people confuse the concepts of Margin and Mark up in calculating prices. A 100% Margin can only happen with a cost of zero.

BidPro no longer allows entering 100% or greater to in the Gross Profit field on individual lines or the total job. A cost of zero is not allowed at least .001 must be entered.



Tag the lines to mark up, click the **apply markup** button. This allows specifying a percentage to apply markup to which can go beyond 100.

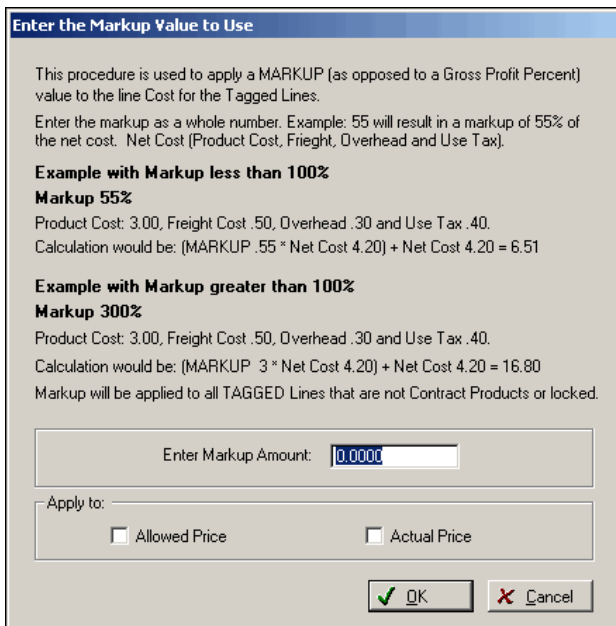


Figure: Enter Markup Value Screen

Type in the markup amount and then check to apply to **allowed** price, **actual** price or both.

Misc Charge

Version 17.0

This is an amount manually entered for a charge that is not going to be a line on the estimate. If services are not used, the installation amount could be entered here or a charge such as a measure fee could be entered here.

Sales Tax

In BidPro when an order is entered, select the ship to city, but change the zip, BidPro calculates the tax by store code because some larger cities have multiple tax rates within the same city depending on the zip code. To keep from defaulting back to the store code tax rate, make sure all zip codes for a particular city are entered in the city list.

Total

GP

Adjust Total



A function was added in version 10.5.6, to allow entering a new total for an estimate and the actual line amounts (and possibly misc charges) will be adjusted proportionally to force the estimate to match the desired estimate total. 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. This feature is made for making small adjustments to the total and is not a replacement for adding pricing to the bid ie leaving cost = price then adjusting the total to match the desired profit percentage.

As of version 12.1(Spring 2013), this tool allows taking locked lines into account.

An option is given to adjust allowed amounts or only actual amounts.

An option is given to adjust locked lines. If not chosen the changes will be applied to only unlocked lines.

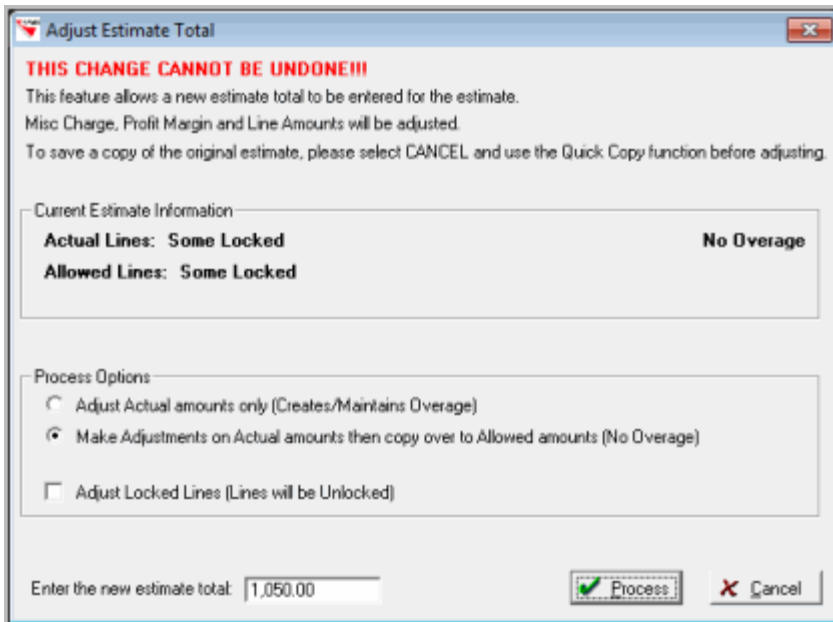


Figure: Adjust Estimate Total Tool

Example:
Estimate Before
Version 17.0

Line Item Will be Changed (090623)

Product Code: 01 F8 CARPET
 Style: ANNIVERSARY F8
 Color: APPLEWOOD
 Unit: SY
 Supplier: BEAULIEU F8

Actual Only Use Tax Line
 Update Allowed Costs
 Update Actual Costs

Allowed		Actual	
Width	12.00	Width	12.00
Length	50.00	Length	50.00
Quantity	66.67	Quantity	66.67
Cost	10.1500 F8	Cost	10.1500 F8
Use Tax	0.0000 (0.0000)	Use Tax	0.0000 (0.0000)
Freight	0.35	Freight	0.35
Load	0.0000	Load	0.0000
Overhead	0.2071 2.0000 %	Overhead	0.2071 2.0000 %
Price	10.71	Price	10.71
Gross Profit	0.00 %	Gross Profit	0.00 %
Total	714.04	Total	714.04

Materials:	714.04
Install Service:	0.00
Misc Charge:	0.00
Sales Tax:	35.70
Misc Tax:	0.00
Total:	749.74
Gross Profit:	0.03%

Adjusted Total to \$775.00

Estimate After

Line Item Will be Changed (090623)

Product Code: 01 F8 CARPET
 Style: ANNIVERSARY F8
 Color: APPLEWOOD
 Unit: SY
 Supplier: BEAULIEU F8

Actual Only Use Tax Line
 Update Allowed Costs
 Update Actual Costs

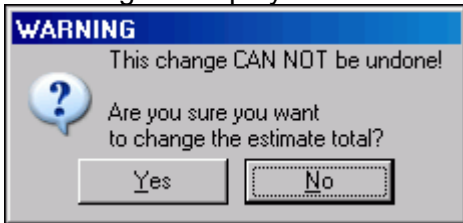
Allowed		Actual	
Width	12.00	Width	12.00
Length	50.00	Length	50.00
Quantity	66.67	Quantity	66.67
Cost	10.1500 F8	Cost	10.1500 F8
Use Tax	0.0000 (0.0000)	Use Tax	0.0000 (0.0000)
Freight	0.35	Freight	0.35
Load	0.0000	Load	0.0000
Overhead	0.2071 2.0000 %	Overhead	0.2071 2.0000 %
Price	11.07	Price	11.07
Gross Profit	3.29 %	Gross Profit	3.29 %
Total	738.09	Total	738.09

Materials:	738.09
Install Service:	0.00
Misc Charge:	0.01
Sales Tax:	36.90
Misc Tax:	0.00
Total:	775.00
Gross Profit:	3.29%

Version 17.0

This change is not reversible so a [copy of the estimate](#) should be made to go back to the original numbers.

A warning will display before the final changes are posted.

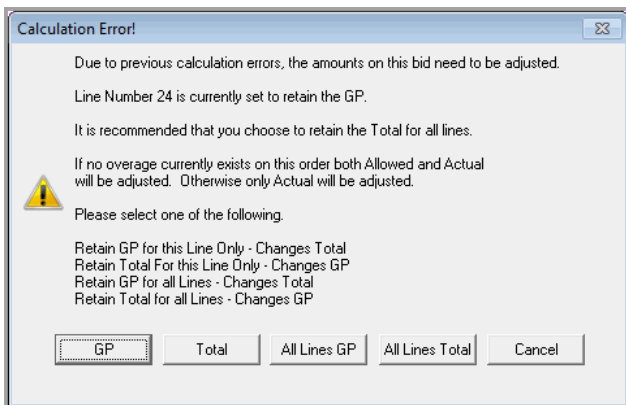


Notes:

When Exporting to Order Entry, the line total lock will always pick up the actual total lock setting from the BidPro Estimate Lines.

Calculation Error Message

Some calculation errors were discovered in the past code. If an estimate or template is opened that was affected by an error, a warning box will display and allow the calculations to be corrected.



The options are:

GP: Retain GP for the listed line only and change the total

Total: Retain the total for the listed line only and change the GP

All Lines GP: Retain GP for all lines only and change the total

All Lines Total: Retain the total for all lines only and change the GP

Cancel: Exit and make no changes

Informational Section

The screenshot shows a software toolbar with several buttons: Copy, Copy Info, Notes, Attachments, Insert, B, Print Estimate, Save, and Cancel. A red circle highlights the 'B' button, and another red circle highlights the status bar which displays 'Lines: 2 Total Difference: 0.00'.

Origin Indicator

The small letter here indicates the origin of this estimate. Some options are

B-Originated here in Bidpro

M-Originated in Measure

C-Converted from DOS Estimates

Lines

Number of lines

Total Difference

If the allowed and actual do not equal; this number is the amount of the overage that will be created.

Adding Estimate Lines



Lines can be added as a new line or can be created from an existing line (Copy Lines). To add a new estimate line, open the main estimate. Click on the Insert icon that is located at the bottom of the Job Estimate Screen. The Add Lines screen appears.

The screenshot shows the 'Estimate Line' screen. It has a header 'Estimate Line' and a sub-header 'Original Product Info'. Below this are several input fields: Line # (1), Area (BR 1), Start Date, Completion Date, Product Code (07), Item Name (DARDENE - 5"), Item Num (21674), Desc (SEDONA), SERIAL #, Unit (SF), and Supplier (MANNINGTON). There are also checkboxes for 'Actual Only', 'Update Allowed Costs', 'Update Actual Costs', and 'Use Tax Line'. A small 'B' button is visible. At the bottom, there are fields for 'User Line Label 1' and 'User Line Label 2', and a checkbox for 'Override Selling price'. A table compares 'Allowed' and 'Actual' values for various metrics: Quantity (210.00), Cost (3.9900), Use Tax (0.0000), Freight (0.0000), Load (0.0000), Overhead (0.4433), Price (9.96), Gross Profit (55.4743%), and Total (2,090.91).

Figure: Line Screen

Line Number

The line number is incremented automatically.

Area

Entering a line will automatically bring up the Select Area screen. This screen allows finding and selecting a specific area for the estimate. These areas are user-defined. It is possible to create additional areas from this screen. Click on the green plus sign and enter up to 15 alphanumeric

characters to describe the room(s), etc. for this product. You can sort estimate lines by the area name by clicking on the area **TAB** found on top of the line area window. In addition, you can sub-total by area when printing the estimate. Area is a mandatory field.

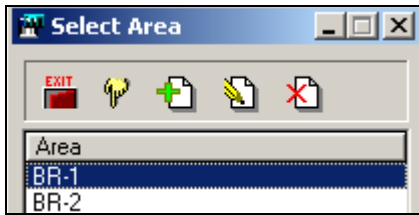


Figure: Select area screen



Using the area field to describe the material type or the area of installation will allow printing a work order and picking ticket from RFMS with each of these values.

Start Date

Enter the date this line item would be installed, picked up, etc. The Start Date entered on the main estimate is inserted here automatically.

Completion Date

Enter the date this line is estimated to be completed. The completion date must be equal to or later than the **start** date. The completion date entered on the main estimate is inserted here automatically.



Selecting all lines from products or inventory rather than manually entering them is recommended. By doing so all the data is kept consistent and will allow updating cost and availability information especially if using an electronic product catalog.

Product Code

Press the **F8** button to access the product code list. Search for product codes by the name by clicking inside the Filter field. Or, you can click on the up and down arrows next to the Search Product Code field to search by number.

Double-click to select a product code and export it back to the estimate line.

After selecting the product code, the Products file automatically appears. Use this method if you are unsure of the product code and / or the product name and numbers. If you have good descriptive information, type in the product code and press **TAB** to move to the next fields.

Style, Color, Item #, Description, Units

These fields allow assigning or picking the product for this estimate line. Press **F8** to assign specific products to this estimate line from the Products or Inventory file from Style Name (with rolls) or Item Number (with items).

Searching

Click on one of the search tabs at the top of the screen to find product or inventory records based on the **TAB** description. Click inside the search field (the name of the search field changes depending upon the **TAB** selected) and enter a few characters and press **TAB** to begin the search.

After finding the correct style or item, double-click on a color or description located in the lower left portion of the screen.

Supplier

This would be used with an unreferenced line.

Check Boxes

Actual Only

Now decide if you want to enter Actual costs and Allowed costs. The Allowed costs are what the builder/contractor will allow for this product. The Actual costs are what the builder allows plus any upgrades selected by the customer. To enter the Allowed figures, click in the box next to "Actual Costs Only" to remove the checkmark. Deselecting this box, will display the Allowed costs box.

Update Allowed Costs

If Update Allowed Costs is checked and the Allowed column has been left blank, when you click OK, the Allowed will be filled in with the Actual amounts.

If you do not want the Allowed costs to change if the product selection changes, leave this box blank. Normally, the Allowed costs would probably not change, even if the product selection (and subsequent costs) changes.

Update Actual Costs

If Update Actual costs is checked, and the Actual column has been left blank, when you click OK, the Actual will be filled in with the Allowed amounts.

If you change the product selection on the line and that product has a different cost than the one previously assigned, the costs for the new product will replace the old costs if this box is checked. You probably would want to check this box to ensure that you are always working with the correct costs as the customer changes their mind about styles and items.

Use Tax Line

Use tax selection is only available if the store code assigned on the estimate is set to LINE tax. If line tax is used, you have the option of applying a use tax to this line. If so, click inside the box to check it. Use tax will be computed for all lines marked in this manner and totaled for the entire estimate.

User Line Labels

These show here and on the estimate line browse screen. Define what they are called in *Utilities>System Options>BidPro>Estimates/Templates>User definable field Estimate Line #1 and User definable field Estimate Line #2.*

Actual vs Allowed Fields

In a builder or commercial scenario, BidPro allows tracking the product/amount bid vs what was used. This feature can be used to create overages in order entry.

Actual

The Actual cost box appears for each line automatically. For the Allowed cost box to appear, click in the Actual Only box to deselect it. The Actual costs would be what the customer or bidding actually decided upon. To copy the Actual costs to the Allowed cost box, click on the BLUE (left pointing) arrow.

Allowed

The Allowed costs are what the builder / contract will allow for this product. The Allows Cost box only appears if the Actual Only box is NOT checked. To copy the Allowed costs to the Actual cost box, click on the BLUE (right pointing) arrow.

Actual and Allowed Data Fields

Width - for carpet this defaults to the width on the Product record.

Length - enter the length or press **TAB** to enter the Quantity.

Quantity - if you did not enter the Length, enter the square yards.



The quantity can be left at zero to facilitate using this bid as a template.

Cost - if a cost was present on the Products record, it will be inserted here. You can accept that cost or press **F8** to choose another from the cost list. (The cost list is entered from the Products record). Or, you can override both and enter a cost.

Click on the **F8** button next to the cost field in the Actual or Allowed costs boxes, and the following screen will display the regular roll and cut costs. Click on either the Roll or Cut cost to select a cost.

Products Costs	
Product Record	
Product Code 01 CARPET	
Supplier D&S	
Style: BEAUTIFUL	
Cost Type	
<input type="radio"/> Roll Cost: \$0.43	<input type="radio"/> Special Roll Cost: \$0.00
<input checked="" type="radio"/> Cut Cost: \$0.49	<input type="radio"/> Special Cut Cost: \$0.00
Ok Cancel	

If you click on the other cost when selecting the Product, the Roll and Cut costs are not shown at the top of this box. To select a cost, click on one of the costs shown in the list.

Use Tax - if the store or city list entered for this estimate is set to Use Tax, the tax amount is calculated and shown in this field. If the store or city is set to line tax, and you want use tax calculated for this line, check the box labeled "Use Tax Line". Otherwise, you can leave this field blank.

Freight - enter a freight amount as a dollar amount, if applicable.


Load-

Freight and load can be a part of the product record making no manual entry necessary.

Overhead Percentage - enter an overhead percentage, if applicable.

An **overhead** factor can be entered in *Utilities>System Options>System Wide>Order Entry>Standard Overhead Margin Set Up* making no manual entry necessary.

As BidPro allows entering a margin on both material and service lines, when an estimate is exported to order entry it has the overhead margin base of Material + labor regardless of the setting in Standard Overhead Margin Set Up.

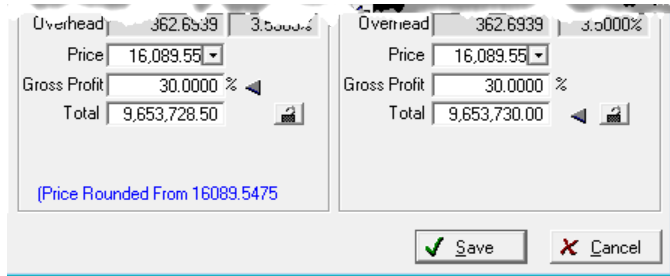
An arrow  indicates which of the three factors (Price, Gross Profit Percentage, or Total) is key for this bid. (I.e. which of these 3 fields was edited last and is therefore controlling the calculations.)

Price - The price is calculated automatically based on the cost and the gross profit percentage you selected for the line. If you want to enter a different selling price, you can down arrow to the right of this field to pick one from the Products record, or manually enter one. This allows you to "play" with the GP%.

Gross Profit Percentage - recall the three percentage amounts entered on this estimate? The percentage selected as the default is displayed here on the estimate line. Either keep the default, or enter another percentage amount as needed. If you select a selling price from the Products record, the default GP% is replaced with a new calculation based on the selling price you selected. You may also enter a GP% to "play" with the selling price.

Total - the total here is the **selling** price for the line. If you opted to show **Actual** costs, click on the Blue arrow to copy the Allowed figures into the Actual column.

If the Unit Price has been rounded to a two digit number which seemingly does not calculate to the total, a note will display showing the Unit Price used for calculations.



Line Browse List

Line Number	Area	Style	Color											
01	1	SANCTUARY	BEIGE MIS	19.01	0.00	12.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	14.9100
06	2	BATH 1	BRUSHED	51.10	0.00	-----	0.00	0.00	0.00	0.00	0.00	0.00	0.00	41.3900
81	3	ALL CPT AREA		0.36	N/A	-----	0.00	50.00	0.36	18.00	0.00	0.00	0.2900	

Actual Cost	Allowed Cost	Actual Frit	Actual Load	Actual OverHead	Actual OH%	Actual GP%	Actual Use Tax	User
14.9100	14.9100	0.5400	0.0000	1.6567	10.0000	0.0000	0.0000	
41.3900	41.3900	0.0000	0.0000	4.5989	10.0000	0.0000	0.0000	
0.2900	0.2900	0.0000	0.0000	0.0322	10.0000	10.0000	0.0000	

Line information Displayed

Besides the information described above, the line also displays the following fields:

Product Sequence Number (a non-editable system generated number).

Color Sequence Number (a non-editable system generated number).

Cost Changes on Lines

Some companies choose to routinely update the costs on all estimates. The person who entered the estimate may not know that a cost adjustment has been made. 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 option *Utilities>System Options>BidPro>Estimates/Templates>Display Unreferenced Lines in Red* 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	Item #	Style/Name	Color/Description	Allow Price	Difference	Current Cost	Overage Cost	Allowed Cost
06	1	CERAMIC FLO	GEN13	GENDA 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			654.89	0.00	0.0000	500.0000	500.0000

Figure: BidPro Lines

Line Tools



Copying Estimate Lines

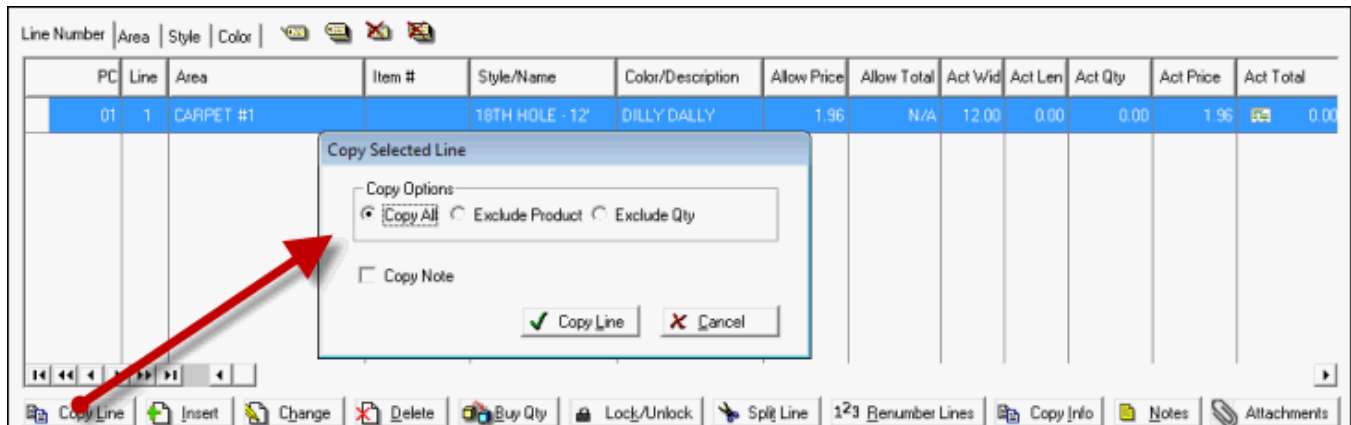


Figure: Copy Line

To copy a line:


1. Highlight (not tag) the line to be copied.
2. Click the **copy line** button.
3. Select a copy mode by clicking the appropriate button.

Copy All - this selection copies all information from the highlighted line to the new line.

Exclude Product - Exclude Product Information. This selection copies everything except for the Style/Color or Item Number/Description to the line. Use this option when entering multiple lines of the same quantity to speed up data entry.

Exclude Quantity - This selection copies everything except for the quantity/length amounts to the new line. Use this option when entering multiple lines of the same product but with different amounts for different areas, rooms.

Copy Note – check to copy line note from the current line to the new line.

4. Click on the Insert button (Which has now has changed to Copy  Copy).

Enter the new Area Name and any other information needed.

Change Line



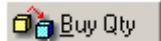
Clicking this button allows changing the highlighted line. BidPro now stores on the estimate line the product information assigned to a new line and displays it as 'Original Product' on the line edit screen. This information will not change even when product information is edited on the line. The original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

Delete Line



Clicking this button allows deleting the highlighted line.

Buy Quantity



Use this option to change the quantity to match the buy quantity. If a buy/sell quantity is set on the product record, set the option Automatically Resolve Buy In Quantities and Sell In Quantities to

yes to automatically on the estimate line or to no to allow changing these buy/sell quantities manually. This may be done with multiple lines or on a line-by-line basis depending on how the options 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.

Locking Lines

Estimate Line

Original Product Info

Line # F8 Area F8 Start Date F8 Completion Date F8

Product Code F8 HARDWOOD

Item Name F8

Item Num

Desc

SERIAL #

Unit 5" X 0"

Supplier F8

Original Actual Cost:

Actual Only Use Tax Line

Update Allowed Costs

Update Actual Costs

Override Selling price

Allowed		Actual	
Quantity	<input type="text" value="210.00"/>	Quantity	<input type="text" value="210.00"/> Bill Qty
Cost	<input type="text" value="3.9900"/> F8	Cost	<input type="text" value="3.9900"/> F8
Use Tax	<input type="text" value="0.0000"/> (0)	Use Tax	<input type="text" value="0.0000"/> (0)
Freight	<input type="text" value="0.0000"/>	Freight	<input type="text" value="0.0000"/>
Load	<input type="text" value="0.0000"/>	Load	<input type="text" value="0.0000"/>
Overhead	<input type="text" value="0.4433"/> 10.0000 %	Overhead	<input type="text" value="0.4433"/> 10.0000 %
Price	<input type="text" value="9.96"/>	Price	<input type="text" value="9.96"/>
Gross Profit	<input type="text" value="55.4743"/> %	Gross Profit	<input type="text" value="55.4743"/> %
Total	<input type="text" value="2,090.91"/>	Total	<input type="text" value="2,090.91"/>

User Line Label 1

User Line Label 2

Click the padlock to lock the lines on either allowed, actual or both. Unlock the line by clicking the button again.

Locking has the following effects:

Price and **GP%** fields will be disabled and cannot be edited.

Unit price will be approximated based on the locked total. Because of this, price * qty may not precisely match the locked total.

Locked lines are not affected by the **green dollar sign**, **markup**, **apply GP%**, or **Adjust Total**.

Note: Contract lines cannot be locked unless "override contract price" is checked (lock button is disabled). If a non-contract line was locked first, then later became part of a contract, the line should be treated as a contract product, so the line should receive updated contract prices at the appropriate times. This means that you should ignore lock status when updating contract line prices.

In addition to the lock on individual lines, a tool has been added to Lock or Unlock all lines at once. The tool allows setting the allowed and actual lines separately In the case of estimates created by importing from measure all the lines are brought in locked.

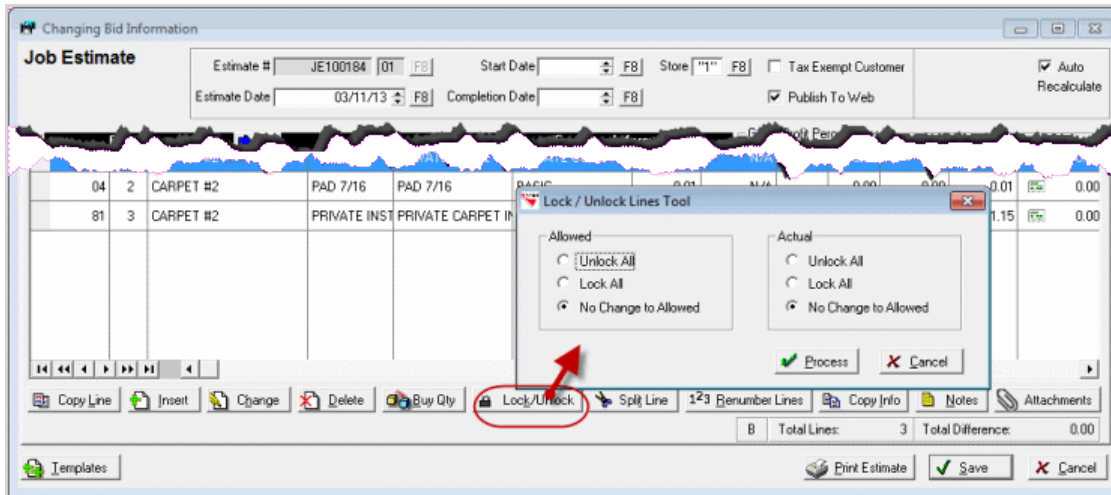


Figure Line Lock Tool

Splitting Lines



This feature allows a line to be broken up into one or more lines.

To split a line:

1. Single click on the line to be split to highlight it.
2. Click on the **Split Line** button.
3. A small screen appears to enter the new area name and quantity or length for the NEW line.

Area

Enter the area description for the NEW line. The original line will retain the area name already entered.

Length or Quantity

Enter the length or quantity that should be transferred to the NEW line. This amount will be subtracted from the original line. The new line plus the modified original line will equal the total of the original line before the split.

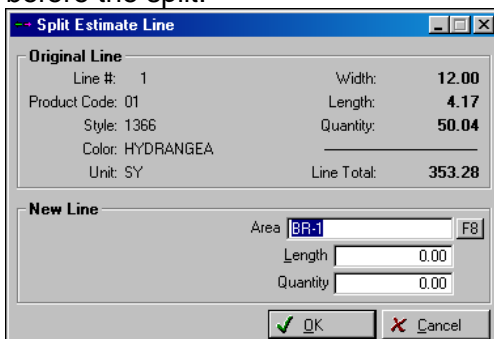



Figure: Split Estimate Line Screen

Renumbering Lines

 This option allows quickly renumbering lines so that all lines on an estimate are in sequential order. For instance, an estimate has 4 lines and to create a template based on this estimate but only wish to use lines 1, 2 and 4. When you create this new template, the lines will appear on the new estimate as lines 1, 2 and 4. If to reorder these to read 1, 2 and 3, click the renumber lines button.

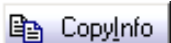


Notes:

Lines with notes cannot be renumbered.

To insert space between lines, edit a line and use F8 to increment it to the next available line number. This will leave a space in the numbering to insert a line.

Copy Info (Copy Line Info)

 This option allows copying information onto all tagged or specified 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.

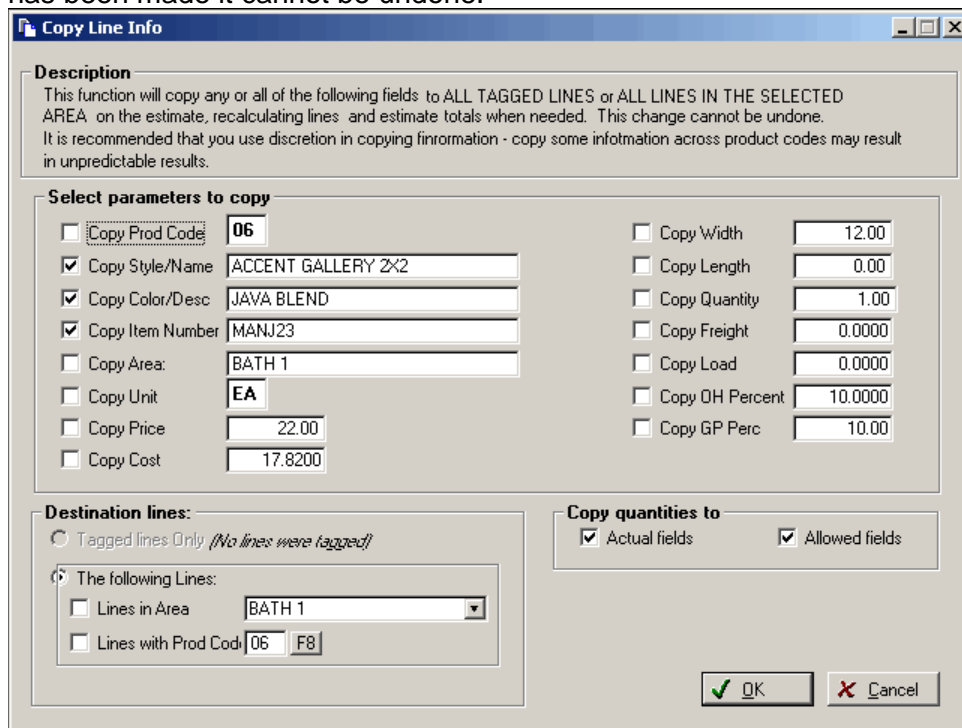


Figure: Copy Line Screen

Select Parameters to copy

The Information will be pulled in from the highlighted line, but can be edited.

Destination lines


Either tag lines to be changed or select lines of a certain area or product code or use a combination.

Copy Quantities to

Select either Actual, Allowed or both.

Notes



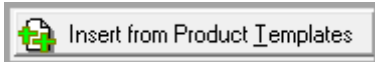
Clicking this button allows you to add a note to the highlighted line. The line now has a small note icon in the far left-hand column. 

Attachment



This allows you to attaching files to the individual lines. The steps for doing this are the same as for attaching files to the bid.

Product Templates

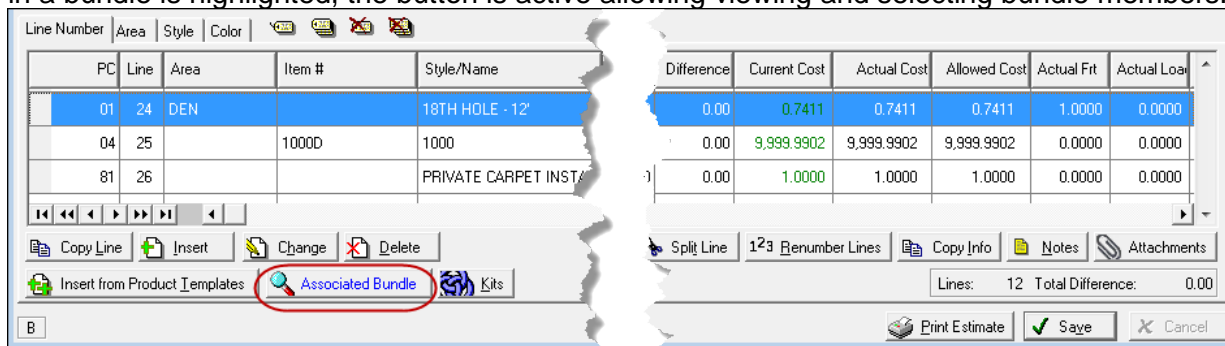


As of version 10.6.1, BidPro has the capability of using Product Templates which previously had been available only in order entry.

Associated Product Bundles

As of version 10.6.1, BidPro has the capability of using Associated Product Bundles.

An Associated Product Bundle Button has been added to the add/edit screen. When the main product in a bundle is highlighted, the button is active allowing viewing and selecting bundle members.



The screenshot shows a software interface with a table of product lines and a toolbar. The table has columns for Line Number, Area, Style, Color, Item #, Style/Name, Difference, Current Cost, Actual Cost, Allowed Cost, Actual Frt, and Actual Loa. The first row is highlighted in blue. The toolbar contains buttons for Copy Line, Insert, Change, Delete, Insert from Product Templates, Associated Bundle (circled in red), and Kits. At the bottom, there are buttons for Print Estimate, Save, and Cancel.

Line Number	Area	Style	Color	Item #	Style/Name	Difference	Current Cost	Actual Cost	Allowed Cost	Actual Frt	Actual Loa
01	24	DEN			18TH HOLE - 12'	0.00	0.7411	0.7411	0.7411	1.0000	0.0000
04	25			1000D	1000	0.00	9,999.9902	9,999.9902	9,999.9902	0.0000	0.0000
81	26				PRIVATE CARPET INSTA	0.00	1.0000	1.0000	1.0000	0.0000	0.0000

A member of the bundle can also be a main product of another bundle which will cause it to highlight the button.

[Click here for details.](#)

Kits

Kits are a function of the Property Connect module used for placing property management orders online.

[Click here for information on that module.](#)

Print Estimate

The same directions apply here as they do for printing from the estimates browse screen. See [directions.](#)

Save or Cancel



Save or Cancel the changes made and exit back to the Estimate Browse Screen.

Save Estimate as a Template



Templates can be created and then exported to an estimate or directly to Order Entry.

To create a template from an estimate:

1. Create an estimate following the instructions given in the previous section.
2. Highlight the estimate and click on the Template icon  located on the toolbar.
3. The estimate is now considered a template, indicated by the Template icon in the far left-hand column of the list screen. 



Notes:

- You can only create one template at a time from an existing estimate.
- You can export lines from different templates to one estimate.
- You can export templates directly to order entry, without creating an estimate.
- You can create estimates from existing templates by clicking on the Create New

Estimate icon.



Template Export to an Estimate

Click the Template Export icon that is located on the Estimate Browse Screen.



This screen allows you to create a new estimate from a template.

Remember that once the export is done, the template exported will not appear on the Job Estimate screen. You must click on the right hand buttons that displays Templates or All and Exported or All on the Job Estimate screen in order to view any items that have been exported to order entry. Bid-Pro does not default to show those items.

Export Options


Export entire template to a new estimate - creates a new estimate using all information from this template, including all lines and customer information.

Export template header information and selected lines to a new estimate - creates a new estimate using the customer information and only the tagged lines.

Export selected lines only to an existing estimate or template - adds the tagged line information to an existing estimate or template. If you leave the estimate number field blank, you will be prompted to specify an existing estimate number on the Estimate Lookup screen. Clicking F8 will allow you to see a listing of existing estimates and templates

You must click on the Export button to complete this process. Once this is done, a message box will appear to let you know whether or not the export attempt was successful.

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You can click on close  to exit without exporting

Delete Estimate/Template



Clicking this icon allows deleting the highlighted estimate or the tagged estimate.

Note: If an estimate with sub-estimates is deleted the sub-estimates will be deleted also.

Tagging Options



Select (tag) and unselect (untag) estimates singularly or all with these icons. Estimates can also be tagged and untagged by right clicking next to them in the browse estimates list.

Viewing Estimate/Template Lines



This screen displays all lines entered on the highlighted estimate.

To view lines:

1. From the Estimate listing screen, single click on the estimate to highlight it.
2. Click on the View Lines icon located on the toolbar.
3. The lines entered for the estimate display.
4. Use the up and down arrow keys to scroll through multiple lines.

Estimate/Template Notes



If a note exists there will be a note icon next to the record.

Clicking this button allows adding or editing notes on the Estimate. The note to process box will come up allowing a choice of which type of note to enter or edit. If a note exists the words on the note to process box will appear in red indicating the type of note.

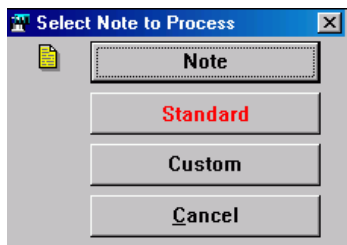


Figure: Note to process box

The note options are the same as in order entry.

Additional Information Tab

This tab contains Ad Source, Contract Type, Order Type and Service Offering marketing fields. The Customer Email, Publish To Web, and Origination Code are also on this screen.

Figure Additional Information Tab

Export or Append to Order Entry



This screen allows specifying certain information when exporting estimates or templates to Order Entry.



Best Practice: Password protect this button allowing someone in a management position to review the data before it is exported.



Notes: As of version 10.6, **model** will automatically be exported to order entry.

Figure: Export to order entry screen

Order Number

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Press the **F8** key for a computer generated number, or enter one (only if the option "Only Allow Computer Generated Invoices and Quotes" is not set to yes).

To append estimate lines to an existing order, type in an existing invoice number. The exported lines will be added to that order.

Order Date

Enter the date to use for the Order Date. Order date defaults to today's date.

Customer Type

Click on the **F8** button to display the Customer Type pick list. Double-click on a customer type to select it. The customer type will default as it was set in order entry. This field displays a customer description.

Estimated Delivery Date

Enter the estimated delivery date. Click on the **F8** button for an on-line calendar or press "D" for today's date.

If the Auto post Estimated Delivery Date is **not** set to yes (*>Utilities>System Options>Order Entry>Order Entry>Automatically Post Estimated Delivery Dates in Order Header and Lines*), when exporting a bid to Order Entry if the Estimated Delivery Date (this is a user definable label from *>Utilities>System Options>System Wide>Order Entry >Estimate Delivery Date Prompt*) is earlier than the order date then the quote cannot be exported. A message will give the reason.



Also if the Estimated Delivery Date is blank and require Estimated Delivery Date option is set to yes then also warn user and stop export. This could happen when option was set after the quote was created

If Auto post is checked, Estimated Delivery date on the order automatically populates with the line estimated delivery date.

Customer PO #

Enter up to 12 alphanumeric characters for the customer purchase order.

Tag Lines

To tag all lines on the template or estimate, click on the tag-all icon . To tag individual lines, click in the far-left column or the single tag icon  while that line is highlighted

Export Custom Note to Order

Click here to automatically export the estimate custom note to the ORDER custom note in Order Entry

Export Custom Note to Work Order

Click here to automatically export the estimate custom note to the WORK ORDER custom note in Order Entry.

Export Internal Note to Order

Click here to automatically export the estimate Internal note to the ORDER custom note in Order Entry

Export Line Notes to Work Order Lines

Click here to automatically export all notes that were entered on the estimate lines to the WORK ORDER lines in Order Entry.

Export Line Notes to Order Lines

Click here to transfer line notes from the estimate to the lines on the customer order. If this option is checked, similar lines will not be combined in Order Entry.

Combine and append to similar lines (line notes will be lost when this option is enabled).

Selecting this option will combine all similar lines on the customer order. The lines will be combined for the creation of the customer order, but not the work order

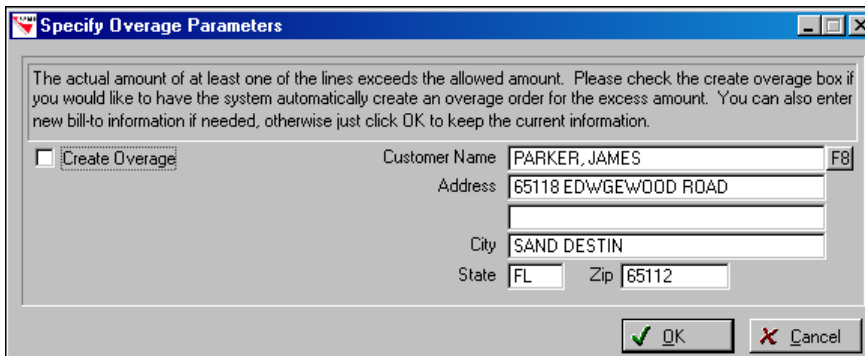
Do Not Export Prices & Totals (Price and Totals will be set to 0)

If this box is checked the prices and totals will go over as 0. If checked, overage will not be allowed.

When exporting an Estimate with an Overage

When an estimate is exported to order entry and there is an overage attached, the following dialog box will appear. Read the text carefully and click Create Overage if that is what to do. If you elect to create an overage, you can specify a different customer name to be used for the overage. That way, you can have an original order that is billed to one company or person, and have the additional amounts billed to a second company or person (builder upgrades, for example). You also have the option to cancel the export. This will give you a chance to make sure the difference was intentional.

If you do not opt to create an overage, the entire Actual Costs amount will be exported to the order.



The actual amount of at least one of the lines exceeds the allowed amount. Please check the create overage box if you would like to have the system automatically create an overage order for the excess amount. You can also enter new bill-to information if needed, otherwise just click OK to keep the current information.

Create Overage

Customer Name: PARKER, JAMES F8

Address: 65118 EDWGEWOOD ROAD

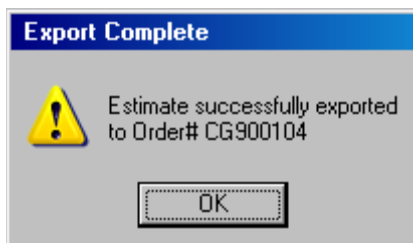
City: SAND DESTIN

State: FL Zip: 65112

OK Cancel

If you choose to create an overage, it will automatically be added and associated with the main order.

Then, a message box will confirm if the export attempt was successful.





After the export is complete, it may appear on the Job Estimates screen as if the exported estimate has been removed completely from Bid-Pro, however no estimates are deleted. Make sure to adjust the right hand display buttons accordingly. Only non-exported estimates are defaulted to appear on the Job Estimate screen. Remember to click on the **all** button to view all estimates.

With Version 10.5.3 BCOE was adjusted so that freight, overhead and load are separated in order lines on a per unit amount. Bids exported to Order Entry as of Version 10.5.4 automatically break out freight and load to be exported appropriately into Order Entry.

Enter Item Color

To choose the color of material at the time of exporting, leave the item number as a **?** or a **blank**. A prompt will allow choosing the color before exporting to order entry.

Area	PC	Item Number	Supplier	Style	Color	Quantity	Price	Total
001A	06	?	BP-BORAL BRICKS-BOURBON		[F8]	311.46	11.75	3,653.66

Use this Color for ALL subsequent lines with '?' as their Color

OK

Entering a check in the box on the bottom right of the screen will use the color entered for all the other lines in the estimate with **?** or **blank** as the color.

Importing RFMS DOS Estimates (Not available with version 10)



This feature imports estimates from the RFMS Legacy (DOS) program based upon the selection criteria entered.

Import What

Estimates - import only Legacy estimates

Templates - import only Legacy templates

Starting and Ending Dates

Enter the framing dates to import. These two dates refer to the estimate or template date. The dates can be left blank to import all records.

Customer Name

Press **F8** to select a customer name from the customer list. The customer name can be left blank to import records for more than one customer at a time.

Model

This field allows typing in a model description to import only records with the same model entry. Otherwise, leave Model blank to select from all records.

Omit Duplicates

If you do not want to import estimates from Legacy that share the same estimate number as an estimate in Bid-Pro, click in this box. The Import Options would not apply; the import would simply ignore those estimates with duplicate numbers.

Stores

Select the appropriate stores by tagging.

Build List

After you have entered the selection criteria and Import Options, click on the Build List button. The qualified records will be displayed in the list area on this screen. From there, either tag individual estimates to import or tag all estimates to import.

Import Options

If using Bid-Pro and have entered estimates and templates prior to importing from Legacy, estimate numbers may be the same. If a duplicate is found during the import, you can:

Skip the import - do not import estimates with duplicate numbers.

Replace the existing estimate with the imported one.

Re-number the imported estimate - creates a new estimate in Bid-Pro using the imported estimate.

Prompt for action each time a duplicate is encountered - decide as you go.

Import Selected Estimates Button

After building the import list and tagging estimates, click on this button to begin the import process.

Then, a message box will confirm if the import attempt was successful.

Selection Criteria Estimates Templates

Start Date: 01/01/80 F8 End Date: 12/06/04 F8
Customer Name: F8
Model: F8
 Omit duplicates

Stores

Import Options Action when an estimate being imported has the same number as an existing estimate:

- Skip the estimate and do not import it
- Replace the existing estimate with the imported one
- Re-number the imported estimate (effectively creating a new estimate based on the DOS estimate)
- Prompt for action each time a duplicate is encountered

By Estimate Number	by Estimate Date	by Job Number	by Customer Name	by Project Name		
Estimate	Est. Date	Sto	Job Number	Customer Name	Customer City	Projn

Buttons: Build, Import, Close

Updating Estimate/Template Line Costs

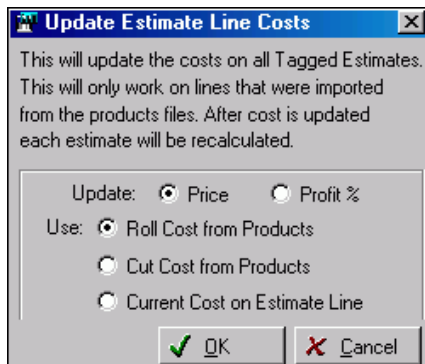


This selection allows updating the selling price or profit margin on estimate lines if the costs of products or services change. It is an easy way to ensure the estimates are up to date when price modifications are received from suppliers or manufacturers. This feature is especially useful if electronic product update files are received regularly.

This feature can also be used to change the cost selection on lines. For example, when entering the estimate lines, roll costs were used. Later, it is decided that rolls will not be feasible and the lines need to be adjusted to use the cut cost factors. Highlight the affected estimates and click **Update Costs** and select cut cost as the cost to use. All tagged estimate lines would then be adjusted by replacing the cost for each product with the cut cost.

To update selling prices:

1. First, decide on updating all estimates or only individual estimates. To update all estimates, tag-all records and continue on to step 2. To update specific estimates, highlight the correct estimate and single click in the far left-hand column. A tag icon appears. The record is now tagged. Continue until all estimates to be updated have been tagged.
2. From the estimate-listing screen click the **Update Costs** button from the toolbar.
3. The Update Estimate Line Costs screen appears:



Update

Decide whether the estimate will reflect any cost increases or decreases. The choices are to adjust the selling price (pass it along) or adjust the profit percentage (don't pass it along and make less or more profit).

Price

The selling price on the estimate line will be changed to reflect the change in cost. If the cost went up, the selling price will go up and vice versa. To not change the selling price to the customer, select Profit % instead of Price.

Profit %

The profit percentage on the estimate will be changed to reflect the change in cost. If cost went up, profit percentage will go down and vice versa.

Use

Roll Cost from Products: Cut Cost from Products:

Select one. The selected cost will be inserted into the Cost field on the estimate line.

Current Cost on Estimate Line: Does not pull new pricing from the products file.

When finished the **number of lines updated** screen will show:

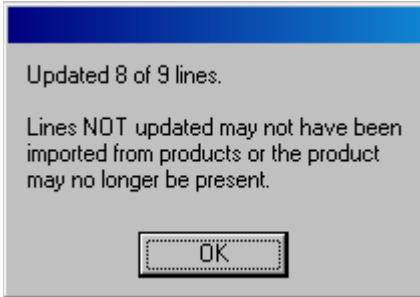
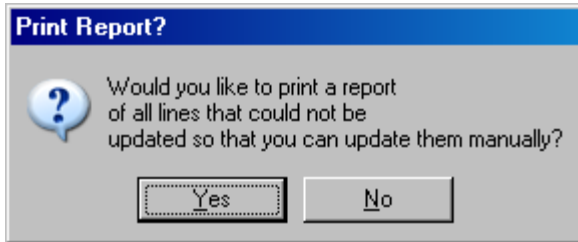


Figure: Number of lines updated screen

If lines are present which were unable to be updated, this screen will display.



Here is a sample report.

7/17/2009

3:58 PM

Unreferenced or Un-Updated Estimate Lines BidPro Cost Update Utility

Estimate-Sub #	Line #	Area	Supplier	Manufacturer
JE000003	1	3 BR-1	BEAULIEU	
PC 01		Style:ARUBA	Num:	Desc:ARUBA
				Cost: \$6.390
JE000003	1	4 BR-2		
PC 01		Style:STUFF	Num:	Desc:OTHER
				Cost: \$5.000

If updates are made to lines, this will be indicated on the individual lines as well. For details on this see [Cost Changes on Lines](#).

Quick Copy Estimate/Template

Edit>Copy Utilities or 

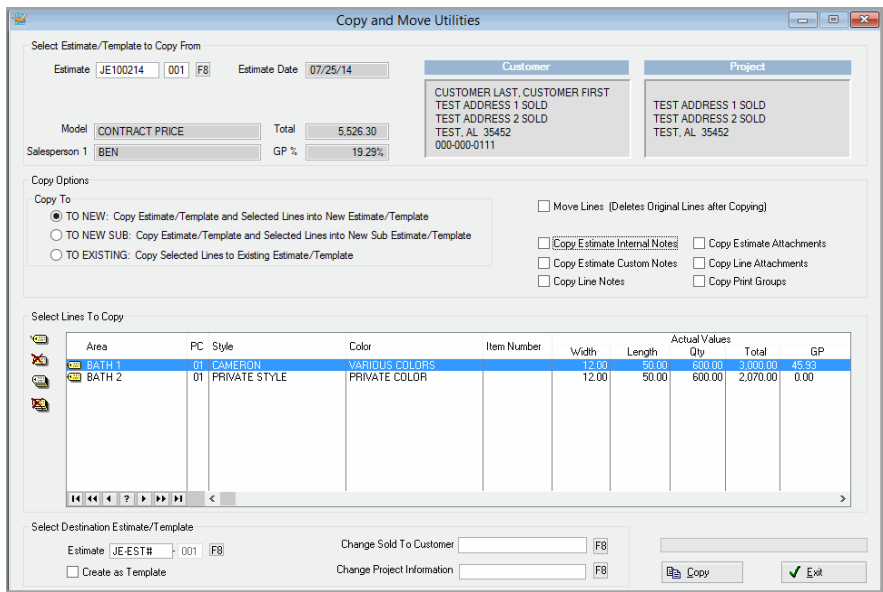


Figure: Quick Copy Screen

This option allows copying the selected estimate to create a new estimate or a sub-estimate. A sub-estimate is connected to the original estimate but does not affect the original estimate in any way.

For example, an estimate has been created that has many lines of product for a specific job. The customer decides that they would like to see what the price would be if they put ceramic tile in the kitchen instead of the vinyl that is on the original estimate. Instead of modifying the original estimate, create a sub-estimate and enter the ceramic information without changing anything on the original.

A sub-estimate has the same estimate number as the original with an additional three-digit number assigned in sequential order (002, 003, 004, etc.) The sub-estimate numbers can be seen on the estimate list screen.

Copy Options

Copy to New Estimate: creates an entirely new estimate. Press **F8** at the New Estimate Number field to assign a new estimate number, or type one in manually.

Create Sub-Estimate: creates an estimate that is linked to the original estimate. A sub-estimate uses the original estimate number, and a three-digit sequential number to designate it as a sub-estimate.

Create Sub-Template: creates a template that is linked to the original template. A sub-template uses the original estimate number, and a three-digit sequential number to designate it as a sub-template. This option is only available when copying a template or sub-template. (Added in version 10.6.2)

Select Lines to Copy

When copying estimates to either a new estimate or to a sub-estimate, choose to copy all lines or copy individual lines. All lines default to being tagged, by un-tagging lines, those will not be copied.

Check to **Copy Estimate Notes/Custom Message**

Check to **Copy Line Notes**

Check to **Copy Estimate Attachments**

Check to **Copy Print Groups**

Check to **Copy Line Attachments**

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New Estimate Number

Enter the new number before proceeding by clicking F8 or typing in a number.

Click on the Copy button to complete the process or exit to abandon the process.

Area	PC	Style	Color	Item Number	Act Width	Act Length	Act Total	Act Gross Profit
1/2 BATH	06	MESA VERDE	TBD	13131P	12.00	0.00	253.85	23.21
1/2 BATH	07	MONTANA PLANK	TBD	MP	12.00	17.08	316.84	23.23
BATH 1	06	MESA VERDE	TBD	13131P	12.00	0.00	674.36	82.21
BATH MBR	06	MESA VERDE	TBD	13131P	12.00	0.00	630.50	82.21
BR 2	01	UNINVITED I	TBD	7U356	12.00	20.83	531.83	5.14
BR 2	07	MONTANA PLANK	TBD	MP	12.00	0.00	2,133.83	42.76
BR 3	01	UNINVITED I	TBD	7U356	12.00	18.75	478.32	5.06
BR 3	07	MONTANA PLANK	TBD	MP	12.00	0.00	1,973.52	44.29
BR 4	01	UNINVITED I	TBD	7U356	12.00	17.08	435.13	4.93
BR 4	07	MONTANA PLANK	TBD	MP	12.00	0.00	1,787.93	45.34
CLBR2	01	UNINVITED I	TBD	7U356	12.00	1.92	48.35	3.82
CLBR3	01	UNINVITED I	TBD	7U356	12.00	1.58	38.38	0.27
CLBR4	01	UNINVITED I	TBD	7U356	12.00	2.17	54.15	2.95

Figure: Quick copy estimate screen.



This is a great way to make a master estimate that contains standard items. Then for each unique project copy and edit as needed.

Sub-estimates can be used for Property Management and New Home Construction with multiple floor plans for the same development.

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. 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.

Define Custom Filter

Custom filters are useful for limiting the display to only those records you need at any given time. However, 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. 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.

Customer: F8

Customer Zip:

Project: F8

Project Zip:

Model:

First Salesman: F8

Second Salesman: F8

Beginning Estimate Date F8 (Note: if a date is entered for filtering, estimates with blank corresponding dates will be filtered out)

Beginning Estimate Date F8

Beginning Estimated Start Date F8

Ending Estimated Start Date F8

Beginning Estimated Completion Date F8

Ending Estimated Completion Date F8

Filter by store F8

Fields you can filter by:

Customer Name - click on **F8** to select a customer from the customer list.

Customer Zip - zip code (not maintained in a list).

Project - click **F8** to select a project from the customer name/project as 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 the on-line calendar. These are the dates as entered on the estimate.



Notes:

If you filter using a date an estimate with a blank date will not be included.

Store - enter an existing store code or press **F8** to select from the store code list.

Some Filter Uses:

You want 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.

You want 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.

As of version 10.5.6, the filter in Bidpro has the ability to use fuzzy searches. You can perform a 'fuzzy' search 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'.

To Reset the Filter



Click on the Reset icon to clear the custom filter and display all records in the file.

Purging Bids



This option allows you to delete estimates that are no longer needed. **Before purging any data files, be sure to have a valid, current backup.** Purging records speeds up the processing and performance of the program. To purge records, you must specify which records to delete by filling in the selection fields. The fields can be filled using any combination. For example, to delete all bids from before 2005 for the project Windsong, you would type in **Estimate Date** from 01/01/80 and to 12/31/04 and select Windsong in the **Project Name** field.



Notes:

If you leave all the fields blank, all records will be available for deletion.

To purge records:

1. Click on the Purge Bids icon from the toolbar.
 2. Fill in the selection criteria, as described above.
 3. After filling in the selection fields click on the **Build List** button. Bid-Pro will go through the entire database of records and display the ones that meet the criteria. From there, you have a second opportunity to pick and choose which estimates and/or template to purge from the file. To select all records, click on the Tag All button. To select individual records, click in the far left-hand column. The line will change color to indicate that it has been selected.
 4. When you tag an estimate with sub-estimates they are selected also.
 5. You can either print the list of bids to be purged or export the list to a .csv file.
 6. When all records have been selected and you have list saved as you wish, click on the **Purge** button to purge the records from the file.
 7. Click on the close button to go back to the Estimate browse screen.
-

Printing Estimates/Templates



An estimate can be printed from two places in Bid-Pro.

1. From the Estimate Browse screen, highlight the correct estimate and click the Printer button located on the toolbar at the top of the screen.
2. Or, while in the Add/Edit Estimate screen and click on the Print Estimate button.

Either way the **Print Estimate** screen displays.

Figure: Print Parameters Screen

Field Explanations

[Click here](#)

Print Groupings

BidPro>Print Group Button



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 subtotaling fields. This screen also displays areas of assigned and unassigned estimate lines.

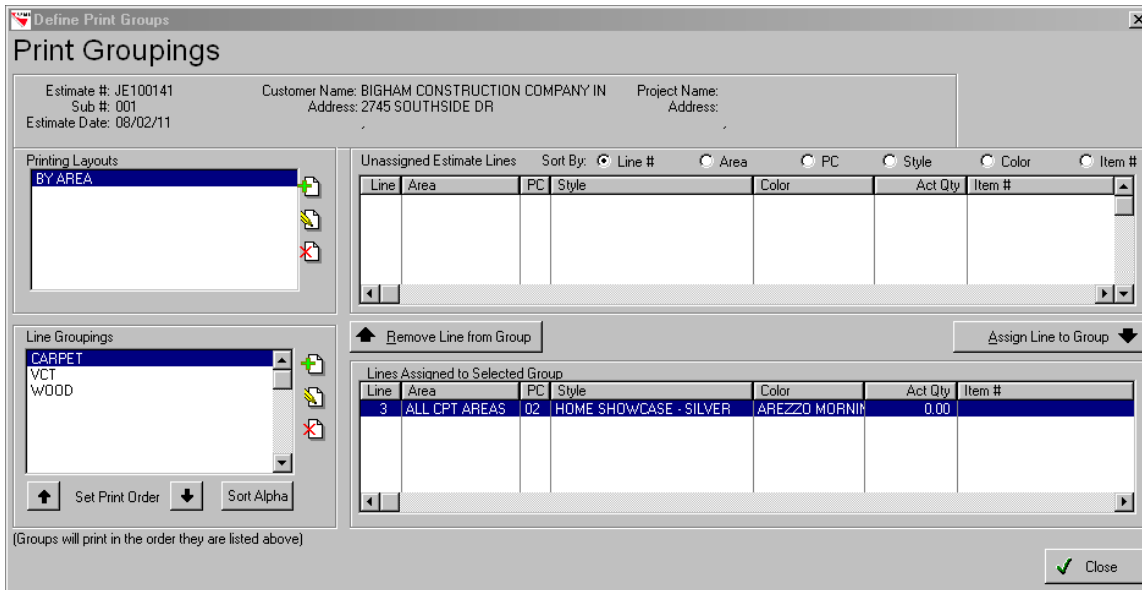
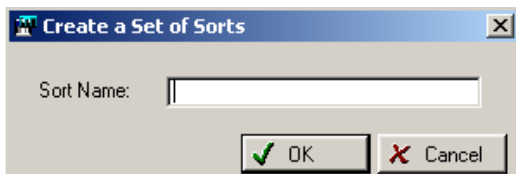


Figure: Define Print Groupings

Group-Layouts

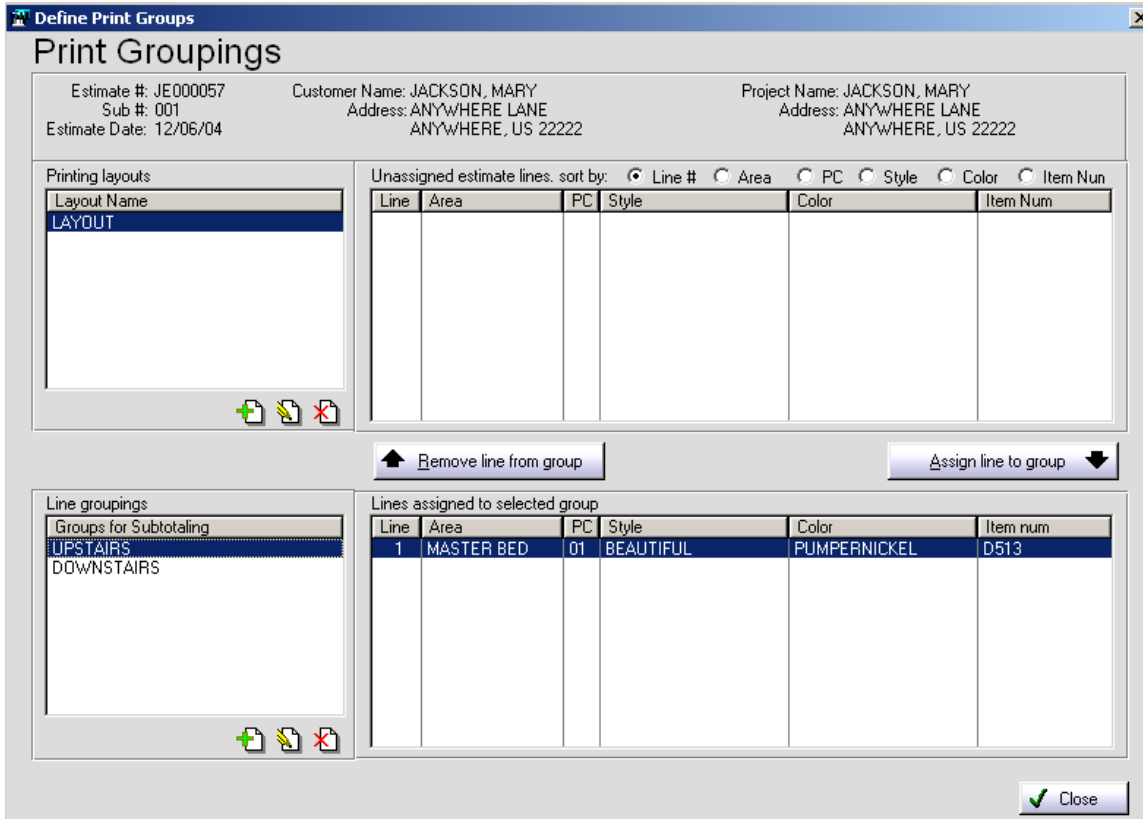


Click on the Insert button to create a new set of sorts (Layout). This option allows you to customize the user-defined areas for printing. You may also change or delete a previously existing LAYOUT name. By setting up these sorts, you will have the option to print a more specific estimate. You may enter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

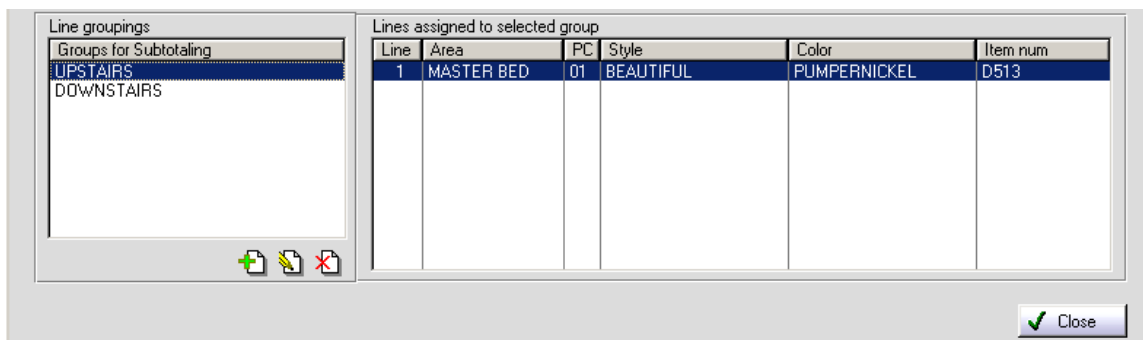


Groups

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.



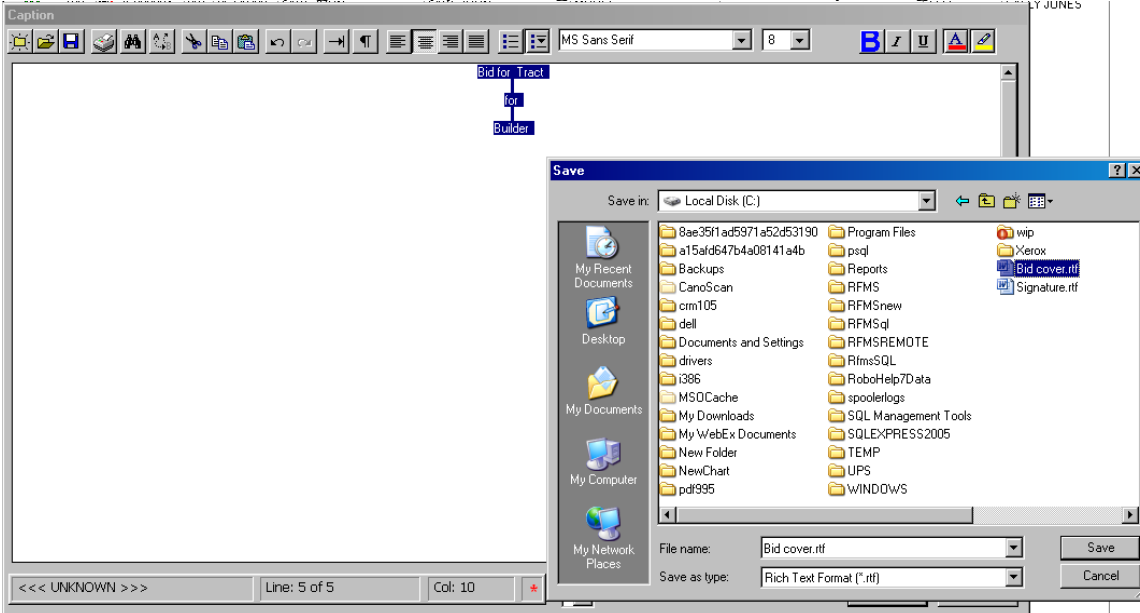
For example, on LAYOUT 1, if you wish to group all material into two different Groups for Subtotaling called; Upstairs and Downstairs, select the areas that correspond with that part of the house and assign them to a group. In the example above you can see that the Den and the Study are together under 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 in order to create more diverse and user defined estimates. The ability to set line group sorting was added in version 11.1, before they printed only in alphabetical order. This is still an option. To change the order of a line grouping, highlight it in the line group box and click either the up or down arrow.



Coverpage/Signature Creator



Use to create a cover page and approval signature for use while printing the Bid



Reports

Bidpro>Reports

Estimates Report

Bidpro>Reports>Estimates Report

Based on the parameters chosen, a variety of reports can be created from the estimates and templates.

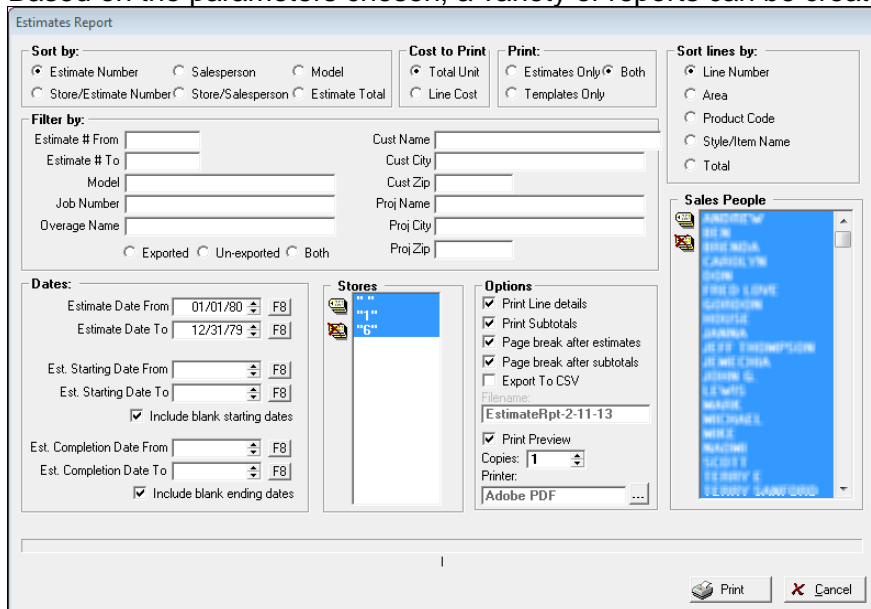


Figure: Estimates Report Options

Cost to Print

Total Unit = Unit Cost + 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

Line Cost = (Unit Cost + Overhead) x 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



Notes:

A bug was fixed in this report in version 10.6, to correct that with the system set to square feet the overhead amount was not calculating correctly. This is fixed only for estimates entered after loading this update. Past estimates will have the defect.

Estimates Profitability Report

[Bidpro>Reports>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
	Proj Zip

Exported Un-exported Both

Dates:

Estimate Date From: 01/01/80 F8

Estimate Date To: 12/31/79 F8

Est. Starting Date From: F8

Est. Starting Date To: F8

Include blank starting dates

Est. Completion Date From: F8

Est. Completion Date To: F8

Include blank ending dates

Stores

- "1"
- "6"

Options

Print Line details

Print Subtotals

Page break after estimates

Page break after subtotals

Export To CSV

Filename: EstProfitRpt-2-11-13

Print Preview

Copies: 1

Printer: Adobe PDF

Sales People

- ANDREW W...
- BOB W...
- CAROL Y...
- CHOW
- FRED D...
- GORDON
- HERRICK
- JUANITA
- JEFF THOMPSON
- JIM W...
- JIMMY G...
- JIMMY S...
- KEVIN
- MICHAEL
- MIKE
- NATHAN
- NICKIE E...
- ROBERT E...
- TERRY L...

Information

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

Page 1		Estimate Profitability Report				9/28/2011									
Estimate #		Store		Customer Information		Project Information		Contract Information		Misc					
CONTRACT# 1		A.R.C.		A.R.C.		705 SABLE LANE		TUSC		Estimate					
10/18/10		7135 OLD BIRMINGHAM HWY		7135 OLD BIRMINGHAM HWY		NORTHPORT		AL		TYPE NEW CONTRACT					
Start Date		COTTONDALE		COTTONDALE		3543		3543		SABE					
Completion Date		3543		3543		NORTHPORT		3543		FPED LOVE					
Estimate Total		\$1,035.55		Misc Charges		\$0.00		Last Exported On:		User Header Label 1					
Material Cost		983.38		Sales Tax		\$5.50		Times Exported:		0					
Service Cost		0.00		Misc Tax		\$0.00		Customer Type:		COMMERCIAL					
COST: 100%		PROFIT: 0%													
Line #	Area	PC	SubItem	Color Desc	Line Total	Total Line Cost	Material S	Qty	Total Freight	Total Labor	Total OH	OH%	GP%	Over	
1	ALL OPT AREAS	01	AVONDALE - IZ	KEY WEST	ALLOWED: \$56.65	\$83.38	\$83.38	66.67	0.000	0.000	0.00	0.00	0.000	-100.00	0.00
	User Line Label 1		Color Change	User Line Label 2	ACTUAL: \$56.65	\$83.38	\$83.38	66.67	0.000	0.000	0.00	0.00	0.000	-100.00	0.00
Line total:					1 Lines	ALLOWED: \$56.65	\$83.38								\$0.00
						ACTUAL: \$56.65	\$83.38								\$0.00
JE10042-001		ANDERSON MGMT. CO.		WILLOW TRACE		705 SABLE LANE		TUSC		Estimate					
06/06/10		WILLOW TRACE APTS		WILLOW TRACE		NORTHPORT		AL		TYPE					
Start Date		2800 MC FARLAND BLVD. E.		TUSCALOOSA		35405		35405		FPED LOVE					
Completion Date		AL		35405		NORTHPORT		35405		SABE					
Estimate Total		\$1,124.88		Misc Charges		\$0.00		Last Exported On:		User Header Label 1					
Material Cost		994.20		Sales Tax		\$2.88		Times Exported:		0					
Service Cost		0.00		Misc Tax		\$0.00		Customer Type:		REDO APARTMENTS					
GP Percent		0.17 % =		\$34.68											
COST: 99.83%		PROFIT: 0.17%													
Line #	Area	PC	SubItem	Color Desc	Line Total	Total Line Cost	Material S	Qty	Total Freight	Total Labor	Total OH	OH%	GP%	Over	
1	ALL OPT AREAS	01	ABANDON - IZ	BOULDER	ALLOWED: 1,032.00	1,030.20	994.20	66.67	36.000	0.000	0.00	0.00	0.000	-100.00	0.00
	User Line Label 1		COLOR CHANGE	User Line Label 2	ACTUAL: 1,032.00	1,030.20	994.20	66.67	36.000	0.000	0.00	0.00	0.000	-100.00	0.00
Line total:					1 Lines	ALLOWED: 1,032.00	1,030.20								\$0.00
						ACTUAL: 1,032.00	1,030.20								\$0.00

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

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: F8
 Export Date To: F8
 Estimate Date From: F8
 Estimate Date To: F8

Stores:

" " "
 " " "
 " " "

Options:

Print Line details
 Print Subtotals
 Page break after subtotals
 Export To CSV
 Filename:
 Print Preview Copies:
 Printer:

Sales People:

ANDERSON M
 BIR
 BIR
 CARROLL W
 CHAM
 FRED LOPE
 GARDNER
 HARRIS
 JARVINA
 JEFF THOMPSON
 JIMMIE
 JIMMIE G
 LUTWIS
 MARIE
 MICHAEL
 MIKE
 RICHARD
 TERRY E

NOTE: Export history is only available from version 10.6.x forward

Overage Analysis

[Bidpro>Reports>Overage Analysis](#)

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 Version 17.0

when product information is edited on the line. The original product information and original cost are now printed on the Overage Analysis report.

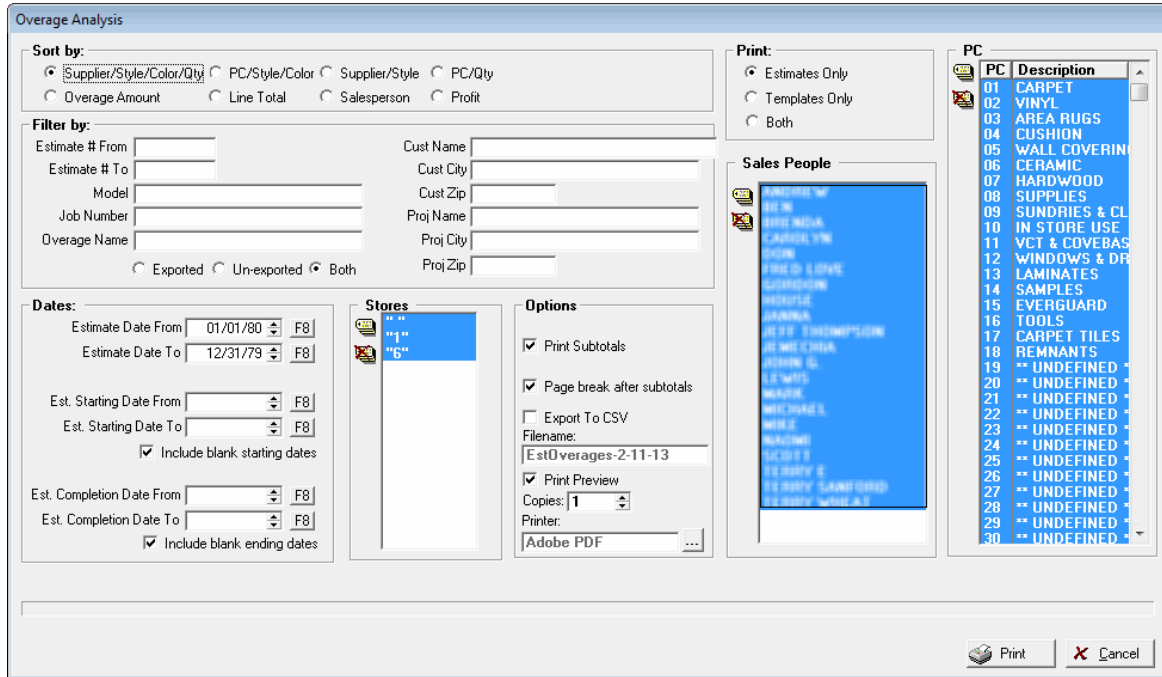


Figure: Estimate Overage Analysis Options

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	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	08		TERRY E	17.00	18.53	4.00	-1.53		
					24.76	18.53	4.00	6.23	25.20	7.76
<u>Cust Name:</u> KYSER CONSTRUCTION			<u>Overage Name:</u>	<u>Proj Name:</u> ***CREDIT HOLD***	<u>Model:</u> CAFETORIUM RENOVATIONS CA FREE					
<u>Supplier:</u>					Subtotal total number of lines:		1	Subtotal overage profit:		25.20
<u>Style :</u>					Subtotal allowed line totals:		17.00	Subtotal average line GP%:		25.20
<u>Color :</u>					Subtotal actual line totals:		24.76	Subtotal overage amount:		7.76

Figure: Estimate Overage Analysis Sample

Help

An online help file is available from this menu option or by Pressing F1.