

BidTool Application Theory & Design

Companion Presentation to BidTool UsersGuide

Prepared By: Derek W. Johnson

Version: 1.0

Presentation Flow



- Introduction to BidTool
- Output Previews
- Template Layout
- Basic Concept & Definitions
- Worksheet Instructions
- Strengths & Limitations
- File Management



Why switch to BidTool from Trend/Bid Prep?

- Current lack of functionality
- Cost accuracy
- Rigid formatting
- Electronic file limitations



Customer Needs

- Consistent format that is easy to read and interpret
- Clear assumptions
 - Prevailing specifications
 - Vendors and lead times
 - Terms & Conditions
- Electronic format
 - Acrobat PDF output for emailing and archiving
- Future flexibility
 - Import/Export files



Sales Staff Needs

- Accurate Costs
- Integrated Take-offs and Bid/Quotes
 - Auditing capability
 - Count flow through into pricing
- Clean & consistent formatting
- Pricing flow-through & analysis
- Flexibility for importation into SXe at a later date



What will be expected of the sales staff?

Of Course any change from the status quo will require that the sales staff adapt and pick up new skills. A primary objective in developing this tool in Excel was that the user should be able to develop a bid with very basic experience in spreadsheets.

Knowledge of very basic Microsoft Excel functions

- Inserting/deleting rows and columns
- Simple equations

Standard MS Windows file management

Renaming files and transferring files

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Bid Output Previews



Page 2 of 5

Bid Cover

Page 1 of 5



Springfield Reclamation

Water & Sewer Improvement Springfield, co

Ouote: 12345678

Bid Date: Tuesday, February 01, 2005 3:00 PM

Bid Proposal Prepared For:

Barney Gumble, ESQ BARNEY GUMBLE EXCAVATING #10 DOWNING STREET SPRINGFIELD, CO 80204

Bid Prepared By:

Bid Lead: Bob Kalcevic Take-Off: Jason Garcia

Colorado Springs 104 West Cucharras Colorado Springs, CO 80903 P: 719.578.8733 P: 719.578.8428 Denver - Corporate 700 Alcott Denver, CO 80204 P: 303.623.6161 P: 303.623.1667 Pt. Collins 3701 Canal Drive Pt. Collins, CO 80524 Pt 970.482,3311 Pt 970.482,3389

Prepared: 1/5/2005 3:11 PM

Proposal Details

Proposal Details

This proposal has been prepared with the following assumptions:

Specifications

Springfield City specifications will prevail in this proposal.

Vendor

Material for this project will be provided by the following vendors:

Material	Vender	Load Times
hectile Pipe	. Browigen, Geet, Joyn. Pion. Comments	
oint Restraints	Star Pipe Products	
apper	Cambridge-Lee	
lydrania	Wateroug	
11 Pittings	Star Plow Products	
Ur Release Valves	Crispin Multiples	2-3 Weeks
actificie Preventers	WatteDimee	2-3 Weeks
React .	Ford Nater Box Company	Stock

Terms & Conditions

The following terms and conditions apply to this proposal:

Prices are valid for 30 days after the bid date.

Totals are for estimating purposes only. Unit prices prevail.

The materials specifications, sizes, and quantities listed are the interpretations of Dana Kepner Company, Inc. and are believed to be correct, but are not guaranteed.

Dana Kepner Company, Inc. is not responsible for manufacturers ability to ship pipe or hold prices.

Terms are net 30, and Quote is based on award of complete project.

Thank you for the opportunity to bid this project.

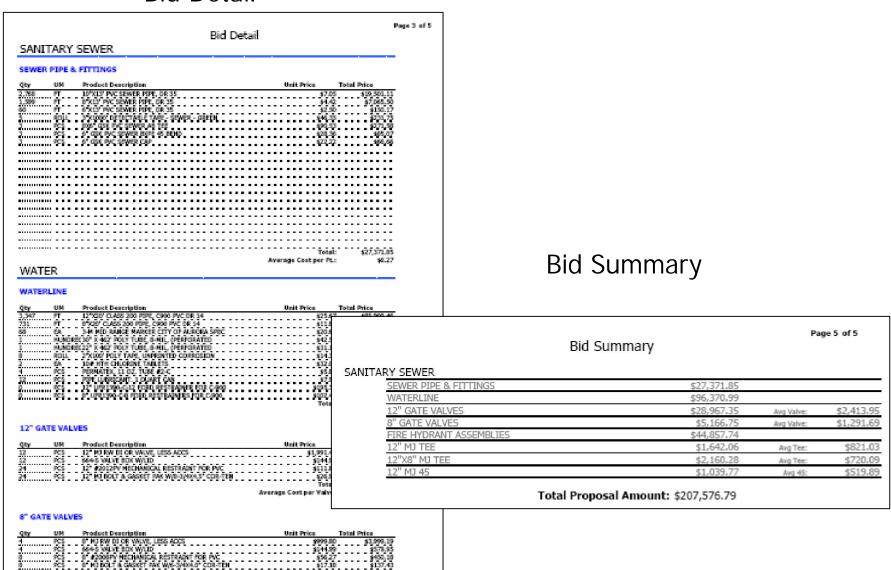
Prepared: 1/5/2005 3:11 PM

Bid Output Previews

KEPNER

Bid Detail

Prepared: 1/5/2005 3:11 PM



Quote Output Previews



Page 2 of 2

To: Barney Gumble, ESQ

BARNEY GUMBLE EXCAVATING #10 DOWNING STREET SPRINGFIELD PD 80204

Fax: 303.123, 67

From: Bob Kalcevic

Date: 12/30/2004 Quote: 12345678

> Springfield Reclamation Water & Sewer Improvement

Springfield, CO

Comments:

Terms & Conditions

The following terms and conditions apply to this quotation:

Prices are valid for 30 days after the quote date.

Dana Kepner Company, Inc. is not responsible for manufacturers ability to ship pipe or hold prices.

Terms are net 30, and Quote is based on award of complete project.

Thank you for the opportunity to quote this project.

Colorado Springs 104 West Cucharras Colorado Springs, CO 80903 P: 719.578.8733 F: 719.578.8428

Denver - Corporate 700 Alcott Denver, CO 80204 P: 303.623.6161 F: 303.623.1667

Pt. Collins 3701 Canal Drive Pt. Collins. CO 80524 P: 970.482.3311 F: 970.482.3389

Page 1 of 2

Qty	UM	Product Description	Unit Price	Total Price
3	FT	6"X13' PVC SEWER PIPE, DR 35		
4	FĪ	8"X13' PVC SEWER PIPE, DR 35	\$4.42	\$17.67
5	FĪ	10"X13' PVC SEWER PIPE, DR 35		
6	PCS	8X6" GSK PVC SEWER AB TEE	\$90.53	
7	PCS	6" GSK PVC SEWER BXPE 45 BEND	\$28.36	\$198.49
8	PCS	6" GSK PVC SEWER CAP	\$22.22	\$177.76
9	FŢ	0 AZO I CL JZ FASTITE JOINT CEMENT LINED	\$13./9	3147,11
10	FT	8"X20' CLASS 200 PIPE, C900 PVC DR 14	\$11.89	\$118.86
11	FT	12"X20" CLASS 200 PIPE, C900 PVC DR 14	\$25.6/	\$282.34
3	PCS	6" MJ RW DI OR VALVE, LESS ACCS	\$628.74	\$1,886.21
4	PCS	8" MJ RW DI OR VALVE, LESS ACCS	\$999.80	\$3,999.19
5	PCS	12" MJ RW DI OR VALVE, LESS ACCS	\$1,991.43	\$9,957.13
6	PCS	664-S VALVE BOX W/LID	\$144.99	\$869.93
7	PCS	12X6" MJXSW TEE, CL, SSB DI, LESS ACCS	\$436.25	\$3,053.74
8	PCS	8X6" MJXMJXSW TEE, CL, SSB, DI, LESS ACCS	\$252.05	\$2,016.41
9	PCS	12" MJ TEE, CL, SSB, DI, LESS ACCS	\$404.73	\$3,642.57
10	PCS	12X8" MJ TEE, CL, SSB, DI, LESS ACCS	\$369.11	\$3,691.11
11	PCS	12" MJ 45 BEND, CL, SSB, DI, LESS ACCS	\$242.35	\$2,665.90
	PCS	8" MJ CAP, SSB, DI, LESS ACCS	\$59.38	\$0.00

The Quote consists of two sections; a Cover Sheet, and a Detail section. The Cover Sheet provides standard fax cover sheet information, along with comments, Terms & Conditions, and branch address and communications information.

The Detail section follows the same general format as that used in the Bid format.

Presentation Flow



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Template Layout



The flow of the Bid spreadsheet is from right to left, according to the steps of the bid process. Generally speaking, those steps are:

Define the Job – Who, What, Where, and When.

Define a Product List – Create a list of products to be used once, and use shorthand here on out.

TakeOff/Count – Go through the plans and record the quantities for each product. Four reports follow that analyze the takeoff information. Optional but Recommended.

Pricing – Work out pricing for each product with the knowledge of the takeoff counts and upto-date pricing. Price a product once and the unit pricing flows through to the Bid &/or Quote.

Bid – Create a clean and presentable proposal with highly customizable summaries for the entire bid and its subsections.

Quote - For less structured Bids, a clean and presentable quotation layout.

\Quote\Bid\Pricing\CR4\CR3\CR2\CR1\CountSheet\ProductList\JobSetUp\

Template Layout



Sheet Title	Description
JobSetup	Identify the customer and job information, and modify the spreadsheet layout based upon the project size. Job and Customer information carries over into the Bid and Pricing worksheets.
ProductList	Create a list of products to be used on the bid. Current costs and prices are gathered and a shorthand 'Prod ID' is created to save the user from having to repeatedly type in full product numbers.
CountSheet	Identify the Sections, Subsections and products that make up the takeoff, and then log your counts into this form.
CR1	A report created from the CountSheet that provides product totals at the Bid Item level. This may be useful in developing the Proposal.
CR2	A report created from the CountSheet that provides product totals at the Bid Item and Bid Subsection levels. This may be useful in developing the Proposal.
CR3	A report created from the CountSheet that provides product totals sorted by product number, with a breakdown by Bid Item. This may be useful in checking your takeoff totals.
CR4	A report created from the CountSheet that provides the product counts for an entire takeoff. This report is also used by the Pricing sheet.

Template Layout



Sheet Title	Description								
Pricing Price your products just one time and the unit price carries over to the sections you define in the proposal. A Bid Total is present at the top of the form as a guide for tweaking the total bid. Bid With the help of the CountReports, the user customizes a pre-built proposal format. Pricing flows through from the Pricing Sheet. A summary sheet is created at the end of the Bid as well. Quote A slimmed down version of the Bid for quotation purposes.									
Bid	Pricing flows through from the Pricing Sheet. A summary sheet is created at the end of								
Quote	A slimmed down version of the Bid for quotation purposes.								

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Basic Concept & Definitions



Prod ID – Not to be confused with the product number, the Prod ID is shorthand for a Dana Kepner product number. The user assigns a product number to a Prod ID and uses that Prod ID for the rest of the Bid.

	А	В	С	D	Е	F	G	J
	Prod							
1	ID	NS	Cat	Product	Description	Bid UM	Conv	Std Cost
2	1		03	03065120	6" X 20'1" CL51 FASTITE JOINT CEMENT LINED	FT	20.08	8.35
3	2		18	18L0611	6" MJ 11-1/4 BEND, CL, SSB, DI, LESS ACCS	PCS	1	35.26
4	3		18	18L06T	6" MJ TEE, CL, SSB, DI, LESS ACCS	PCS	1	53.30
5	4		18	18L06CT2	6X2" MJ TAPPED CAP, SSB, DI, LESS ACSS	PCS	1	25.42
6	5		88	88TAPE	2"X100" POLY TAPE, UNPRINTED CORROSION	ROLL	1	2.50
7	6		09	09075100	3/4" X 100' TYPE K SOFT COPPER TUBING	FT	100	1.47
8	7	Х	09	0907550NS	User provided description, UM, Conversion, and Cost	FT	50	1.47
9	8							

Basic Concept & Definitions



Bid I tem – The highest level of organization within the bid. For instance, if the bid is to be broken down into two categories, 'Water' and 'Sewer', the user would use these two classes as Bid I tems.

Bid SubSection – As the name implies, the SubSection would be a component of a larger bid section.

Price/Cost Updating – For technical reasons, product costs and pricing are maintained on each file. As a result the accuracy of the information goes down the older the file gets. Templates for each branch will be updated as price increases come across. Always use a template to start a new bid!

Basic Concept & Definitions

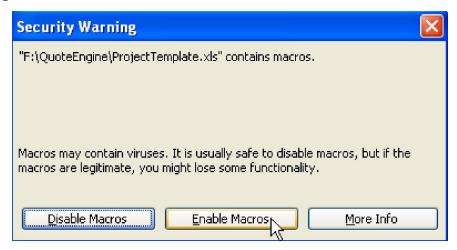


File Portability

- Because the pricing and costs are available in each file, it is possible to take a copy of the template with you when not on the network.
- Save a copy back to the network folder at the next available time. This is critical in our need for managerial review and in maintaining a history.

Macros

- Some of the more complex, and/or repetitious, functionality in the spreadsheet has been automated using special programming known as Macros.
- Accept the macros by clicking on the 'Enable Macros' button.



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Customer & Job Information

In the sample below, a customer number is entered manually into cell B1. Excel then looks up the information on that customer and displays them elsewhere in column B. No information is known on the job, so the user must provide that detail in the boxed cells in column F.

This information flows through to the Bid and Quote formats, and certain pieces are used in pricing.

	Α	В	С	D	E	F
1		Customer Number:	12345678			
2		Customer Name:	BARNEY GUMBLE EXCAVATING	The price type d	i efaults to the customer's	current price type. You
3		Price Type:	101 ()		ne price type by entering	
4		Whse:	1		_	
5		Sales Rep ID:	19 - BOB KALCEVIC			
6						
7						
8		Customer			Job	
9		Address:	#10 DOWNING STREET		Project Name:	Springfield Reclamation
10		City:	SPRINGFIELD,		Description:	Water & Sewer Improvement
11		State:	co		Governing Specs:	Springfield City
12		Zip:	80204		Location:	Springfield, CO
13		Prepared For:	Barney Gumble, ESQ		Bid Date:	2/1/2005
14		Fax:	303.123.4567		Bid Time:	3:00 PM
15					Begin Date:	3/15/05
16					Quote #:	12345678
17					Take-Off Prep:	Jason Garcia
18					Bid/Quote Lead:	Bob Kalcevic



Vendors

The Primary Vendors section of JobSetUp allows the user to identify the vendors and lead times that relate to the Bid. A list of vendors and materials are provided (and may be modified) for use when constructing the Bid.

Best Practices

üProvide lead times whenever possible.

ülf a common vendor/material combination is not available, let Derek Johnson know and that combination will be added to the master template.

üExtra ID's have been provided at the end of the vendor list for additional vendor/material additions.

	Α	В	С	D		
19	Prim	ary Vendors	ndors			
20	ID	Material	Vendor	Lead Times		
21	1	Air Release Valves	Crispin Multiplex	2-3 Weeks		
22	2	Air Release Valves	Val-Matic			
23	3	Air Release Valves	Watts/Ames			
24	4	Backflow Preventers	Watts/Ames	2-3 Weeks		
25	5	Backflow Preventers	Wilkins	Stock		
26	6	Brass	Ford Meter Box Company	Stock		



Terms & Conditions

A basic list of Terms & Conditions have been assembled for use within the Bid and Quote formats. As with the Vendors, an ID is used to call up the T& C text within the output formats.

	Α	В	С	D	Е	F
97	ID	Text				
98	4	Dana Kepner Compan	y, Inc. is not responsible for the mar	nufacturers inabil	ity to ship pipe or hol	d prices.
99	5	Terms are net 30, and	d Quote is based on award of compl	ete project.		
100	2	Totals are for estimat	ing purposes only. Unit prices preva	ail.		
101			days after the bid date.			
102	6	Thank you for the opp	ortunity to bid this project.			
103	3	The materials specific	ations, sizes, and quantities listed a	re the interpretat	ions of Dana Kepner ا	Company, Inc. and are believed
104	7					
105	8					
106	9					
107	10					

Best Practices

ülf a common T&C notation is not available, let Derek Johnson know and that notation will be added to the master template.

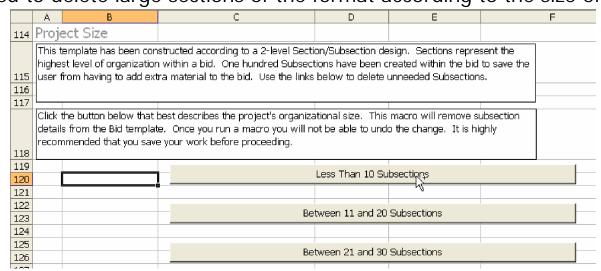
üExtra ID's have been provided at the end of the vendor list for additional T&C notations.



Project Size

The Bid format has been overbuilt to insure that the user never runs out of room. As a result, there quite possibly could be many more detail sections of the Bid format than are needed. Macros have been created to delete large sections of the format according to the size of the

project.



- ü Save the file before running these macros. It is not possible to undo these changes!
- Use the macros before you insert or delete rows with the Bid format. The macros are hard coded to row numbers and could delete information that you would prefer not to be deleted.
- U If you are not using the Bid Format, run the 'Less Than 10 Subsections' macro to reduce the file size.

Worksheet Instructions - ProductList



Dana Kepner product numbers are entered just one time through this process, and only on the ProductList page. Once entered, a ProdID shorthand is used through the rest of the template.

- 1. Enter the Dana Kepner product number into column D. The category, description, bid unit of measure, and cost will auto fill. If an error occurs with the cost, the product either does not exist for the warehouse, or the customer has not been identified on the JobSetUp page.
- 2. If the product is a Nonstock, please provide a description, unit of measure, and cost.

	Α	В	С	D	E	F	G	J
	Prod							
1	ID	NS	Cat	Product	Description	Bid UM	Conv	Std Cost
2	1		03	03065120	6" X 20'1" CL51 FASTITE JOINT CEMENT LINED	FT	20.08	8.35
3	2 (~	18	18L0611	6" MJ 11-1/4 BEND, CL, SSB, DI, LESS ACCS	PCS	1	35.26
4	3		18	18L06T	6" MJ TEE, CL, SSB, DI, LESS ACCS	PCS	1	53.30
5	4		18	18L06CT2	6X2" MJ TAPPED CAP, SSB, DI, LESS ACSS	PCS	1	25.42
6	5		88	88TAPE	2"X100" POLY TAPE, UNPRINTED CORROSION	ROLL	1	2.50
7	6		09	09075100	3/4" X 100' TYPE K SOFT COPPER TUBING	FT	100	1.47
8	7	×	09	0907550NS	User provided description, UM, Conversion, and Cost	FT	50	1.47

- ü Make sure that no errors exist before moving on.
- ü Enter all product and cost information here.

Worksheet Instructions - CountSheet



The CountSheet is the takeoff tool of the spreadsheet. After defining the Bid Item, Subsection, and product, counts are entered for each physical sheet of the plans.

- 1. Enter Bid Item and Bid Subsection titles in columns A&B.
- 2. Enter ProdID in column C.
- 3. Enter product counts by physical sheet number in column H through BE (50 columns).
- 4. Automated totals appear in column F

- ü Renumber sheets in row 3 to match physical plans.
- ü Copy Bid Item and Subsection titles. Avoid retyping.
- ü Delete extra page columns and rows. This removes blank pages from the print area.

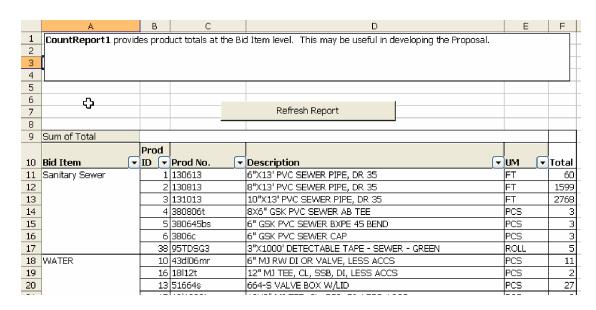
	Α	В	С	D	Е	F	G	Н	I	J	K	L
1												
2								Sheet Totals				
3	Bid Item	Bid Subsection	Prod ID	Prod No.	Description	Total	UM	1	2	3	4	5
4	Water Material	1	1	03065120	6" X 20'1" CL51 FASTITE JOINT CEMENT LINED		3 FT	1	2			
5	Water Material	1	2	18L0611	6" MJ 11-1/4 BEND, CL, SSB, DI, LESS ACCS		6 PCS	2	4			
6	Water Material] 3	18L06T	6" MJ TEE, CL, SSB, DI, LESS ACCS		9 PCS	3	6			
- 7	Water Material	2] 4	18L06CT2	6X2" MJ TAPPED CAP, SSB, DI, LESS ACSS	1	2 PCS	4	8			
8	Water Material	1	5	88TAPE	2"X100" POLY TAPE, UNPRINTED CORROSION	1	5 ROLL	5	10			
9	Water Material	2	1	03065120	6" X 20"1" CL51 FASTITE JOINT CEMENT LINED	1	8 FT	6	12			
10	Water Material	2	2	18L0611	6" MJ 11-1/4 BEND, CL, SSB, DI, LESS ACCS	2	1 PCS	7	14			
11	Water Material	2	3 Դու	18L06T	6" MJ TEE, CL, SSB, DI, LESS ACCS	2	4 PCS	8	16			
12	Water Material	2	4,574	18L06CT2	6X2" MJ TAPPED CAP, SSB, DI, LESS ACSS	2	7 PCS	9	18	·		
13	Water Material	1	6	09075100	3/4" X 100' TYPE K SOFT COPPER TUBING	3	0 FT	10	20			

Worksheet Instructions - CountReports



Four reports have been created to analyze the takeoff. Use these reports to review the takeoff counts and then build the proposal.

Report	Description
CR1	Provides product totals at the Bid Item level. This may be useful in developing the Proposal.
CR2	Provides product totals at the Bid Item and Bid Subsection levels. This may be useful in developing the Proposal.
CR3	Provides product totals sorted by product number, with a breakdown by Bid Item. This may be useful in checking your takeoff totals.
CR4	Provides the product counts for an entire takeoff. This report is also used by the Pricing sheet.



After entering counts into the CountSheet, click the 'Refresh Report' button on each CR page.

If you are using the CountSheets, CR's 1-3 are optional. CR4 will automatically provide counts to the Pricing Sheet.

Worksheet Instructions - Pricing



The Pricing sheet allows the sales rep and management to analyze and adjust pricing in one location with flow through to the Bid and Quote pages. The Pricing sheet takes the list of products created on the ProductList and presents them along with contract/matrix pricing for analysis.

Bid Unit Price (Column H)

The Bid Unit Price is the price that will flow through to the Bid and Quote sheets. The spreadsheet looks first for special contract pricing for the customer and that specific product. If a contract price is not available, the spreadsheet then calculates a matrix price based upon the customer price type (shown on the JobSetUp page) and product category.

	A	В	C	D	E		F	G	Н	I	J	L	M	N	0	P	Q	R	
1	Custo	omei	r:	Barney Gumble Exc.	avating / 12345678	Drodus	t Sort Asc												
2	Proje	et N	lame:	Springfield Reclama	tion	1 10000	1 3011 130	_											
3	Location: Springfield, CO				Proc	IID Sort		Total Bid:	\$208,265.50										
4	Proje	ct S	tart:	March 15, 2005		I Cala Ala	-l., -: - 1400 az												
5	Bid D	ate:		Tuesday, February 0	1, 2005	Hide An	alysis/100 %	_ 1	Total Cost:	\$107,664.05									
6	Bid Time: 3:00 PM		Unhide A	de Analysis/75 % Margin: \$100,601.45		\$100,601.45	48.3%			Sales Price Analysis									
7																Target Margin		Target Price	
	Prod	N					E	3id	Bid Unit	Product	Extended	Std			Margin			Margin	
8	ID	S	Cat	Product	Description		UM G	ìnty	Price	Margin %	Bid Price	Cost	Contract	Matrix	2	Price	Price	ž	
9	1		13	130613	6"X13" PVC SEWER PIPE, DR 35		FT 6	0	\$2,50	46.86%	\$150.17	\$ 1.33		\$ 2.50					
0	2		13	130813	8"X13" PVC SEWER PIPE, DR 35		FT 15	599	\$4.42	46.59%	\$7,065.50	\$ 2.36		\$ 4.42					
	3		13	131013	10"X13" PVC SEWER PIPE, DR 35		FT 2	768	\$7.05	47.48%	\$19,501.11	\$ 3.70		\$ 7.05				d a	
11			38	380806t	8X6" GSK PVC SEWER ABITEE		PCS 3		\$C_1 53	81.80%	\$271.58	\$ 16.48		\$ 30.53					
	4										405.03	4 5 40		* 00.0c	Production of the second		100000000000000000000000000000000000000		
11 12 13			38	380645bs	6" GSK PVC SEWER BXPE 45 BEND		PCS 3		\$28.36	80.74%	\$85.07	\$ 5.46		\$ 28.36	50,03	\$ 10.92	\$ 18,00	00.1	
12	5			380645bs 3806c	6" GSK PVC SEWER BXPE 45 BEND 6" GSK PVC SEWER CAP		PCS 3		\$28.36 \$22.22	80.74% 83.48%		-	\$ 22.22	-	50,03	\$ 10.92	\$ 18,00	69.7	

Worksheet Instructions - Pricing



Sales Price Analysis

If the user determines that the default sales price is not appropriate, calculators are provided to calculate a sales price given a target margin, or for a given sales price what the margin would be. The user activates the calculators by typing in a value into the shaded columns. For example, the user enters 50% into column O for 38080645bs product, and a sales price of \$10.32 is suggested. If the user would like to sell the same product for \$18, they would then be selling at a 69.7% margin.

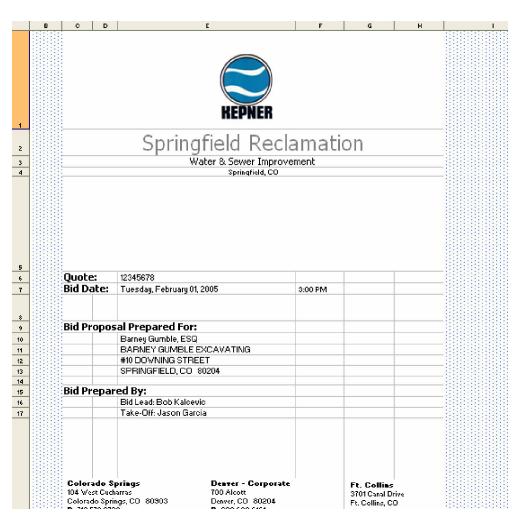
- ü A lot of information is presented on this sheet. If the Sales Price Analysis is not needed, you may hide those columns and zoom in for a clearer display. Use the buttons at the top of the screen to zoom in and out.
- ü Nonstock pricing is obviously not included and will show as a 'NA#' in column H. The user must enter a sales price here.
- ü Once a Bid Unit Price has been overwritten, the price lookup can be reestablished by copying a formula from another product.

	Α	в	С	D	E		F	G	Н	I	J	L	M	N	0	Р	Q	l B
1	Customer: Project Name:			Barney Gumble Exca	Dradust	Sort Asc												
2			ıme:	Springfield Reclamat	Troduct	30K M30	-											
3	3 Location:			Springfield, CO	Prodl	D Sort		Total Bid:	\$208,265.50									
4	4 Project Start:		art:	March 15, 2005	I lide Acel	 : 100 az												
5	Bid Date:			Tuesday, February 01	Hide Anai	lysis/100 %	_ т	otal Cost:	\$107,664.05									
6	Bid Time:			3:00 PM		Unhide Analysis/75 %			Margin:	\$100,601.45	48.3%		Sales Pr		Price Ai	rice Analysis		
7													_	et Margin	Targe	t Price		
	Prod	N					В	id	Bid Unit	Product	Extended	Std			Marg	in		Margin
8	ID	S	Cat	Product	Description	l	UM Q	nty	Price	Margin %	Bid Price	Cost	Contract	Matriz	2	Price	Price	2
9	1		13	130613	6"X13" PVC SEWER PIPE, DR 35	F	ਜ 60)	\$2,50	46.86%	\$150.17	\$ 1.33		\$ 2.	50			
0	2		13	130813	8"X13" PVC SEWER PIPE, DR 35	F	-T 15	99	\$4.42	46.59%	\$7,065.50	\$ 2.36		\$ 4.	12	HH		
1	3		13	131013	10"X13" PVC SEWER PIPE, DR 35	F	-T 21	768	\$7:05	47.48%	\$19,501.11	\$ 3.70		\$ 7.	05			
12	4		38	380806t	8X6" GSK PVC SEWER ABITEE	F	PCS 3		\$ ⊑ 5 3	81.80%	\$271.58	\$ 16.48		\$ 90.	53			
	5	- :	38	3806 4 5bs	6" GSK PVC SEWER BXPE 45 BEND	F	PCS 3		\$28.36	80.74%	\$85.07	\$ 5.46		\$ 28.	36 50	0% \$ 10.92	\$ 18,00	69.7%
13																4 T 4 T	- 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1	
1	6	:	38	3806c	6" GSK PVC SEWER CAP	F	PCS 3		\$22.22	83.48%	\$66.66	\$ 3.67	\$ 22.22	\$ 20.	19 🗀 🖂	타다		



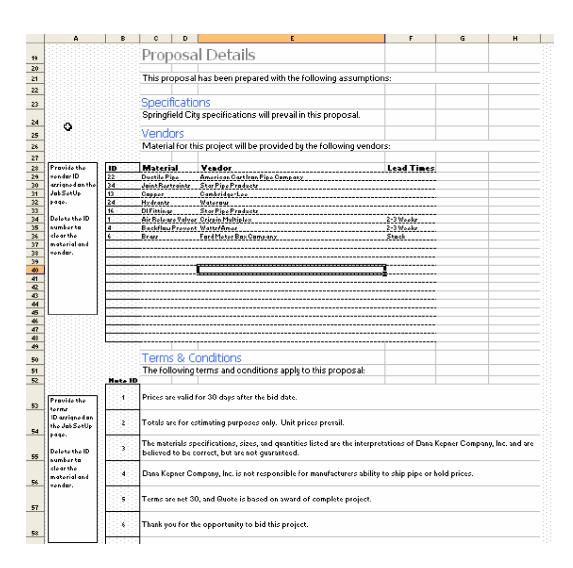
Cover Sheet

JobSetUp information flows through and is automatically formatted.





Specs, Vendors, Terms & Conditions



Use ID's from the JobSetUp page to identify which vendors and terms and conditions apply to this specific proposal.



Bid Detail

The Bid Detail portion of the Bid consists of one hundred identical sections of 20 product rows. A sample section is presented below.

Bid Section Title –Cell C61 – The highest level of organization within the Bid, identify the title by entering a value here.

Bid SubSection Title – Cell C63 – The second level of organization, identify the subsection title here. This title carries over to the Summary section.

ProdID – Cells B66 through B85 – Enter the ProdID assigned on the ProductList to pull description and unit price for each line of the SubSection.

	A	В	С	D	E	F	G	Н	I
0					Bid Detail				
1			SANT	ΓΔRY	SEWER				Delete Section Title row if
2			JANT	- CIXI					not used.
\neg		-	CEMIED	DIDE 9	FITTINGS				—:∥
$\overline{}$	Units/Section:	Ft. 4367	DEWEK	PIPE 6	FITTINGS				Delete extra rows as
5	Total Units:	ProdID	lQtq	UM	Product Description	Unit Price	Total Price		needed.
6	Enter ProdID	3		FT	10"X13" PVC SEVER PIPE, DR 35	\$7.05	\$19,501,11		Manually enter product
7	values from the	9	2,768 1,599	- <u></u>	8"X13" PVC SEWER PIPE, DR 35	\$4.42	\$7,065,50		quantities into column C.
8	ProductList into		60	FT	6"X13" PVC SEVER PIPE, DR 35	\$2.50	\$150.17		
9	column B. Pricing	38	5	ROLL	3"X1000" DETECTABLE TAPE - SEVER - GREEN	\$46.35	\$231.75		—!! !
Ö	and descriptions	4	3	PCS	8X6" GSK PVC SEVER AB TEE	\$90.53	\$271.58		—::::::::::::::::::::::::::::::::::::::
ĭ	flow from the list.	5	3	PCS	6" GSK PVC SEWER BXPE 45 BEND	\$28.36	\$85.07		—::::::::::::::::::::::::::::::::::::::
2		6	3	PCS	6" GSK PVC SEWER CAP	\$22.22	\$66.66		
3			:		V 4011 1002 121101 II				
4				-J.L.					
5									
6			:						
7									
8									
9			:						
0			:						
1									
2			:						
3									
4									
5			:						
6						Total:	\$27,371.85		
7					Ave	erage Cost per Ft.:	\$6.27		



Bid Detail (continued...)

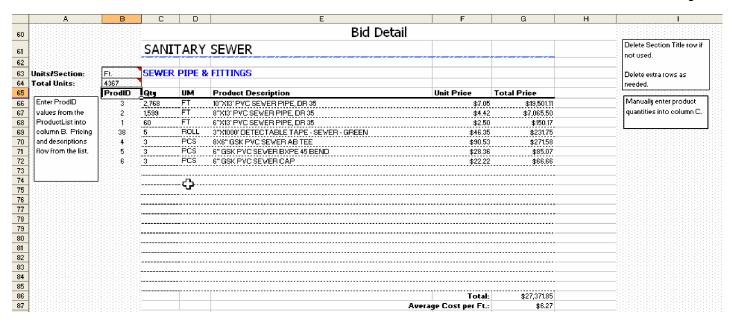
Qty – Cells C66 through C85 – Enter the quantity of the product to extend the line item price.

Total – Cell G86 – The total of all line items for this specific SubSection. This value carries over to the Summary section.

Units/Section – Cell B63 – If an average is to be calculated for this Subsection, enter the units (ie. Ft., Each, Hydrant Assembly) here. This value automatically is incorporated into the average description in Cell F87.

Total Units – Cell B64 – The value by which the SubSection average will be calculated.

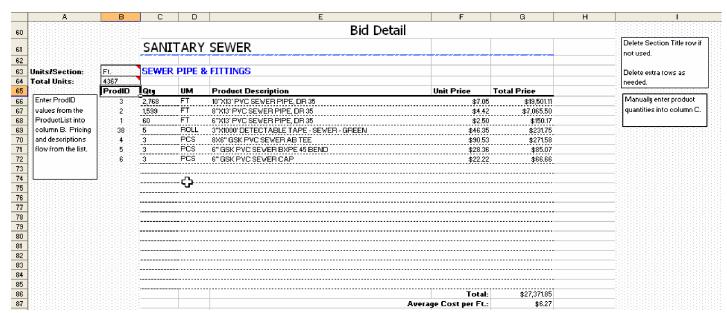
Average Cost – Cell G87 – If an average is to be calculated, the SubSection Total is divided by the Total Units value entered in Cell B64. This value carries over to the Summary section.





Bid Detail (continued...)

- ü Remove excess rows (rows 73 through 85 in the sample above) as the last step in formatting. Hiding rows and sections allows for the ability to add to the form at the last minute.
- ü Remove excess sections once the Bid has been constructed. Use the macros on JobSetUp to remove large sections, but not after rows have been added/removed from the Bid sheet.
- ü Do not manually change pricing on the Bid sheet. Do so on the Pricing sheet.
- ü If a Section title is not used, either delete the text or remove the row.
- ü Do not remove the SubSection title.





Bid Summary

The Bid Summary pulls information from the SubSections for a consolidated view of the Bid Details.

	Α	В	С	D		E	F	G	Н	
179									:	
180						Bid Summar	у			
181										
182			SANITA	RY SEW	/ER					
183				SEWER	PIPE & FITTINGS		\$27,371.85			
184				WATER	LINE		\$96,370.99			
185	This section autopopulates			12" GA	TE VALVES		\$28,967.35	Avg Valve:	\$2,413.95	
100	based upon the information			8" GAT	E VALVES		\$5,166.75	Avg Valve:	\$1,291.69	
40.77	entered above.			FIRE HY	'DRANT ASSEMBLIES		\$44,857.74			
188				12" MJ	TEE		\$1,642.06	Avg Tee:	\$821.03	
189				12"X8"	MJ TEE		\$2,160.28	Avg Tee:	\$720.09	
190				12" MJ	45		\$1,039.77	Avg 45:	\$519.89	
191									:	
192						Total Proposal Amou	unt: \$207,576.79			

- ü Not all Subsections will be used, so rows will need to be hidden/deleted from the Bid Summary.
- ü Only the first Section Title is pulled over from the Bid Detail. Additional titles must be manually added through the entry of new lines.
- ü If an average is not used, an error will be apparent in columns G & H. Delete the individual cells contents to fix.
- ü The user may add sub-totals to the Bid Summary, but beware. The 'Total Proposal Amount' is calculated by adding up all column F values in the Bid Summary section of the Bid sheet.

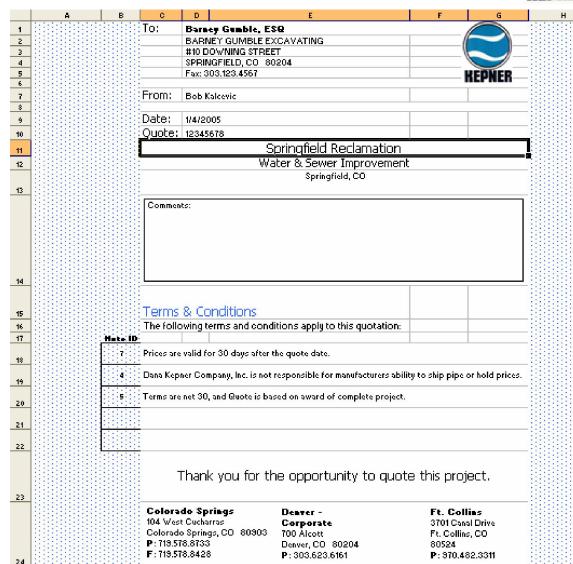
Worksheet Instructions – Quote



The Quote format is a scaled down version of the Bid that more closely fits the needs of the standard quote. The format consists of just two sections, a Cover Sheet and a Detail section.

Cover Sheet

The cover sheet has been designed to act as a fax cover. The information on this sheet auto fills from information given on the JobSetUp sheet.



Worksheet Instructions – Quote



The Quote format has been designed with just one level of organization and a total of 50 lines for individual products. A LongQuote format has also been developed that consists of alternating 100 and 50 product line sections.

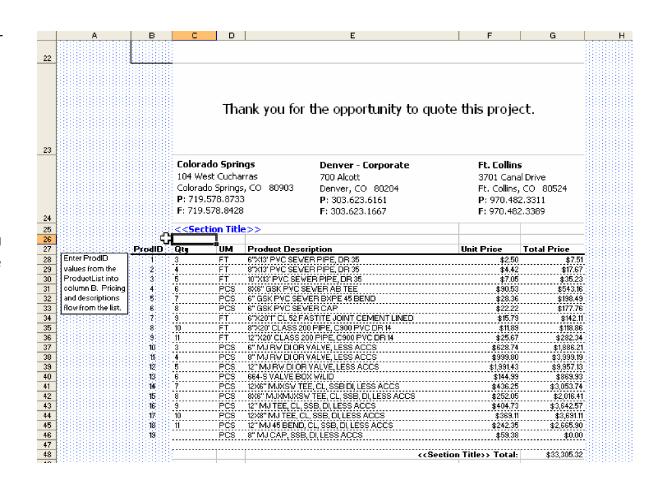
In this example:

Section Title – Cell C25 – Enter a descriptive title here. This title will automatically be incorporated into the Total description that appears in Cell F48.

ProdID – Cells B28 through B47 – Enter the ProdID assigned on the ProductList to pull description and unit price for each line of the SubSection.

Qty – Cells C28 through C47 – Enter the quantity of the product to extend the line item price.

Total – Cell G48 – The total of all line items for this specific SubSection. This value carries over to the Summary section.



Worksheet Instructions – Quote



- ü Remove excess rows as the last step in formatting.
- ü Remove excess sections once the Quote has been constructed.
- ü Do not manually change pricing on the Quote sheet. Do so on the Pricing sheet.



Presentation Flow



- Introduction to BidTool
- Output Previews
- Template Layout
- Basic Concept & Definitions
- Worksheet Instructions
- Strengths & Limitations
- File Management



Flexible Spreadsheet Format

Strength: Infinitely customizable

Strength: Formatting and Print Regions already designed

Strength: Can quickly be modified to fit needs of the business

Strength: Much cleaner output over Bid Prep

Strength: Advanced pivot reporting for take-offs

Strength: Integrated take-offs and Bid/Quote preparation

Strength: Provides the company future flexibility in creating data files for customers



Flexible Spreadsheet Format

Limitation: Some Microsoft Excel knowledge necessary

Limitation: Can be tempting to take shortcuts that prove time consuming in the long run

Limitation: Onscreen display changes from screen to screen

Limitation: Last minute insertions may cause pre-built functionality to break

Limitation: Business process organization will not be kind to those who like to skip steps



Price & Cost Information Available in the Spreadsheet

Strength: Portable file – Does not need to be on the network to work

Strength: Expected improved accuracy over Bid Prep

Limitation: Must continually be updated to reflect changes in Trend/SXe

Limitation: Does not possess all of the pricing functionality present within

Trend/SXe

Limitation: Large contributor to 7MB file size

Limitation: Information accuracy goes down the older the file gets

ProdID Shorthand

Strength: Time saving in developing the Bid and Quote layout

Limitation: ProductList grows throughout the takeoff

Limitation: ProdID's change from Bid to Bid



Pricing All Products from One Sheet

Strength: Change the price once and it flows to every use in the Bid or Quote

Strength: The user can see real time how changing a price will affect the Bid Total and Margin

Strength: Target margin and sales price calculators available on the sheet

Limitation: Sorry no limitations here!

Lacking Functionality

Customer & Product Lookups

Presentation Flow



- Introduction to BidTool
- Output Previews
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- Basic Concept & Definitions
- Worksheet Instructions
- Strengths & Limitations
- File Management

File Management



Saving Files

- -All files must be saved to the Quotes folder for archiving and managerial review
- -Save output as Acrobat files if possible. Excel files will be archived periodically.
- -Files are too large (~7M) for emailing
- -All files are proprietary and may not be shared outside the company

File Archiving

Due to the size of the files, they will periodically be archived to tape or CD/DVD. Because Acrobat files are relatively small, they will not be archived.

File Management



Naming Conventions

IIMMDDYY_Cust_Proj.xls

Where:

II = User Initials

MMDDYY = Month, Day, Year

Cust = Customer short name

Proj = Project short name

.xls for Excel and .pdf for Adobe Acrobat output