**American Constructors Bidders List**

# Document History

10/29/08 (law) Initial document

# Overview

The basic idea of this program is to take the vendor information that already exists in Master Builder and extract it in a form appropriate to send out a bid request letter to a list of selected subcontractors. The subcontractors will be identified by the type of work that they do as well as geographical region and the appropriate sales person to contact for a bid.

From a flow perspective, all initial data will be kept in Master Builder and extracted as needed to an Excel spreadsheet that will be formatted for easy integration with MS Word mail merge.

Objectives of this program are:

1. Use the data in Master Builder for references (vendors, cost codes) but do not allow the project managers to change any of the data
2. Be able to provide additional information about a vendor that would not be kept in Master Builder such as additional sales people, additional cost codes the vendor can work in, and geographical regions the vendor can provide work.
3. Create a one-time list in Excel for a specific job that can then be maintained by the project manager independently of any other data in the system. Essentially, the list would be specific to the job and would not flow back into the master database.

# Program Flow from User Experience

This is the typical steps a project manager would take to create a bidders list for a specific job.

1. Open “Bidders List” program from their desktop
2. Select the cost codes required for the job, the region of the job
3. A list is generated to Excel with all vendors that fulfill the requirements selected in step 2 above.
4. The user makes any adjustments required to the list (remove any names they do not want, add any names if they don’t exist yet, etc.)
5. The user creates a bid request in MS Word and merges it with the Excel list.

# Detailed Program Flow

## Technical Information

Bidder list program will be a separate program that runs from the desktop of the user. It will read Master Builder data from the active Master Builder dataset, but will not write back any data to Master Builder.

## Set Up of Bidders List Program

1. Identify the MB database to read for vendor information
   1. Define the “main office” as the contact information in the vendor screen in Master Builder 4-4 screen.
   2. For each MB database, ancillary information data tables are created for the Bidders List
      1. Geographical Regions Covered by main office
         1. Region Name
         2. Region Description
      2. Cost Code list valid for this vendor main office
         1. Selected from current SMB cost code list (6-5 screen)
      3. Additional Sales People for vendors
         1. Additional Contact information (if different than address in Master Builder)
         2. Geographical regions covered by additional office/sales people
         3. Valid cost code list for additional office
2. Identify the MB vendor types to include in the bidders list
   1. Selected from MB vendor type list (4-4 screen)

## Primary Screen

1. Selection for Bidders List
   1. Select region of target job from list of valid geographical regions
   2. Select cost codes valid for target job
2. Generate Initial List of Vendors
   1. Generate list of matching vendors

## Edit Vendor Information

1. Read-only fields displayed for viewing only – these are all Master Builder fields and are considered the information for the vendor “main office”
   1. MB Vendor Number
   2. MB Vendor Name
   3. MB Contact Information
      1. Address
      2. Contact Name
      3. Phone Numbers
      4. Default cost code (if it exists)
2. User Entered Information for main office
   1. List of geographical regions the vendor can do work (selected from pick list)
   2. List of cost codes that the vendor can complete
3. List of Additional Contacts/Locations/Sales People – user can enter additional locations (unlimited) for a given vendor. Each location can be selected for the bidders list.
   1. Sales person (contact)
   2. Contact information
      1. Address
      2. Phone Numbers
   3. List of geographical regions the vendor office can do work (selected from pick list)
   4. List of cost codes that the vendor office complete

# Deliverables

1. Site license (unlimited users) for stand-alone “Bidders List” program that fulfills functionality defined above.
2. All required installation files for Bidders List program
3. User documentation for program
4. Procedure for users to use Mail Merge with Excel and Word
5. Example MS Word Mail Merge document