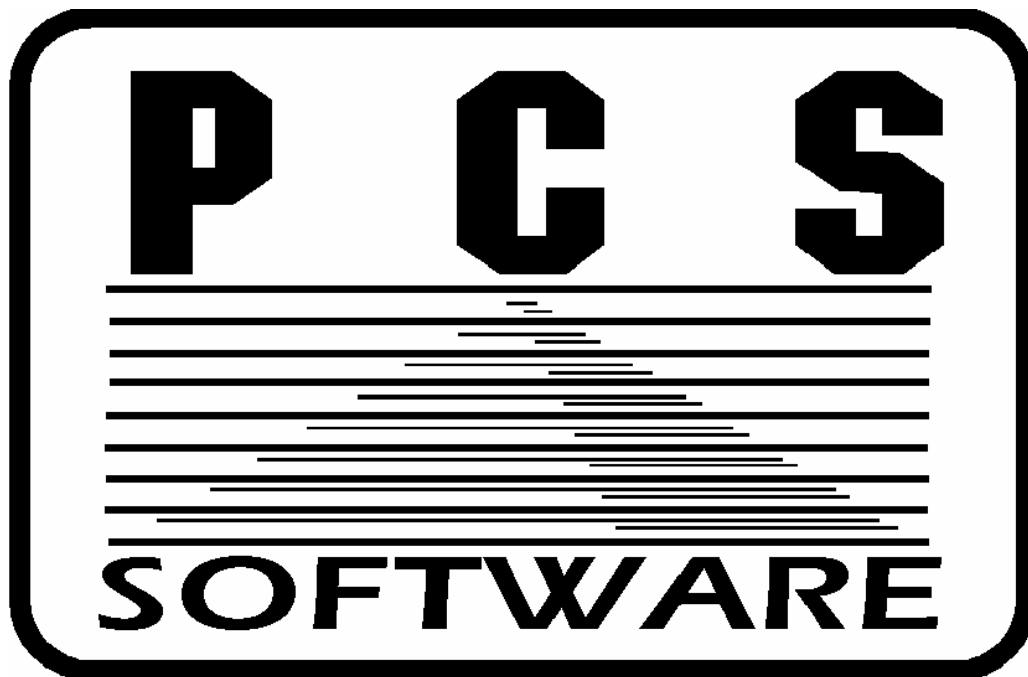


WINBID 2000

Version 4.68



December 2003

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Table of Contents



Chapter 1 - Installation

To install Winbid 2000, insert the disk into disk drive. Log on to that drive and follow the directions for installation.

Note for Network Users

PCS will be glad to assist in the installation of the software on a network site.

What's New



Chapter 2 - General Information

The purpose of the estimating system is to provide the user with fast, easy access to the benefits of microcomputer speed, organization and analytical process. This is accomplished by allowing the user to create an estimate by bid items and then applying the system activities and details to each item. Once the estimate is created, the user can utilize all the features of the system to evaluate the estimate components and perform analytical comparisons to determine the best possible bid proposal.

Key features of the estimating system include :

- 1) **Simplified Design.**
Individual work details provide the foundation to the program. Groups of details form Crews and Activities. Detail crews and activities are applied to each of the bid items. Bid items are grouped by schedules to complete the entire bid.
- 2) **User defined crew/worksheet configurations.**
Individual details of labor, equipment, material, transportation, sub-contract and other details are defined by the user. These details can be grouped and saved as standard crew/worksheet configurations to be used in other estimates.
- 3) **Integrated subcontractor entry.**
Subcontractor items are easily entered, updated, and recorded as part of the estimate file. Comparative prices are shown for all subcontractors.
- 4) **Integrated material entry.**
Prices for material can be entered in groups, and an instant comparison can be made so see which material vendor is lowest.
- 5) **Distributed item processing and Indirects.**
Single estimate items may be divided into separate work segments for evaluation.
- 6) **Mark Up / Round Off / Risk Analysis.**
This feature allows the user to assess, with immediate tabulation, components of Mark Up, Round Off and Contract Risk. The bid classifications can be evaluated as individual components or an average of all the components.
- 7) **Full scope of printing, including reports for bid items, bid details, bid prices and subcontracts.** Printing also includes reports for work activities.

The estimating system consists of two parts integrated into one complete module.

The first part deals with gathering all the cost component details of labor, equipment, material, sub/service, transportation, and other necessary information needed in estimating the cost of a specific item of work.

The second part deals with the bidding of a job or project with multiple items or parts. While the first part created cost this part deals with margin and price. The unparalleled speed and ease of bid price manipulation provides incredible power in optimizing profit potential.

Further, significant user defined components provide for a wide range of both calculated and refined cost. This approach permits this system to be used in a wide range of estimating situations.

Estimating

The estimating portion of the program allows the user to develop large amounts of data that define cost components with an associated unit cost. While the units of measure will be different for these components, the process of storing, retrieving and manipulating the unit costs is the same. Some systems will try to unitize the final unit cost of an item of work when, in fact, many smaller components are actually required to accurately define the cost.

The estimating system allows for a hierarchy of detail. The different levels are:

Schedule - This is for bids with multiple schedules where the owner or agency may want sections of bids broken out separately with subtotals for each section.

Item - This is the specific item of work to be performed and is usually listed as a quantity of work in place.

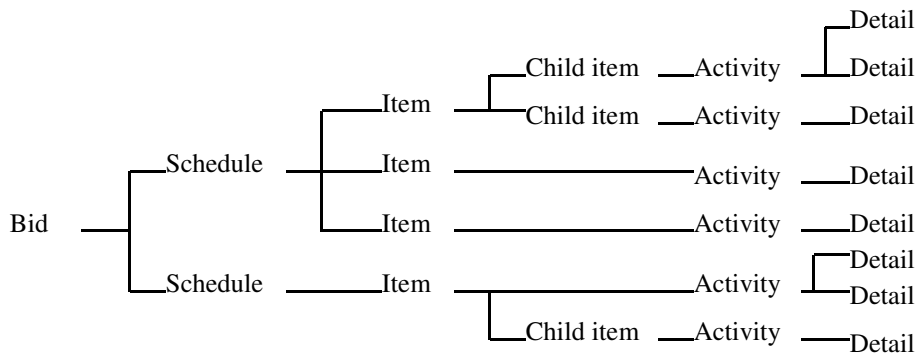
Child Items - Items may be comprised of an additional layer of items. Each child item has its own activities and details. The cost from these items are added to the cost of the regular item.

Alternate Items - Alternate bid items can be created and used to provide additional options to building a bid.

Activity - The activity describes the different operations required to perform the work. These activities can be any grouped classification of work to be performed.

Detail - This is the lowest level component in the system. Each detail will be used to build up activities or sub activities such as crews. At this level each detail will also be designated by type such as labor, equipment, material, transportation, sub/service, and other. This designation will be especially useful during the bidding process where markup may be evaluated on the basis of the different types of cost.

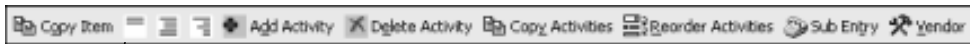
Another way to view the structure of a bid is like this:



Winbid 2000 allows the user to view the item screen in three levels of detail. At the most general level, the screen shows the bid items only. For each item, the unit price and total price are shown.

Click on this button to display to bid item level.

Top Toll Bar:



Sch	Item Cd	Descriptions	Quant	UoM	Unit Price	Total Price	EXIT
1	1	Mobilization	1.00	LS	161,725.55	161,726	
1	2	Curb & Gutter Type A-1	8,000.00	LF	45.88	367,840	
1	3	Curb & Gutter Type B-2	12,000.00	LF	11.57	138,840	
1	4	24" RCP Sub	4,500.00	LF	42.56	191,520	
1	5	36" RCP Sub	3,360.00	LF	50.01	168,034	
1	6	48" RCP Sub	1,500.00	LF	63.85	95,775	
1	6A	Header Cut	112,530.00	LF	0.31	34,884	
1	7	60" RCP Sub	900.00	LF	71.29	64,161	
1	8	Excavation	21,500.00	CY	46.30	995,450	
1	9	Aggregate Base	33,000.00	TN	11.93	393,690	
1	10	AC Base Course	7,000.00	TN	101.84	712,880	
1	11	Header Cut	112,530.00	LF	0.96	108,029	
1	12	Ac Surface Course	35,600.00	TN	53.35	1,899,260	
1	13	Adjust Manholes	142.00	EA	165.81	23,545	

Item	Actual	Cost per Unit	Total Cost	MU %	Markup	Price per Unit	Total Price
		11.214	370,068.60	6.38	23,621.92	11.93	393,690.00
	Estimate	11.214	370,068.08	6.38	23,621.92	11.93	393,690.00

Bid	Actual	Total Bid Cost	% Markup	\$ Markup	Total Bid Price	Balance
		\$11,584,136.82	6.40	\$741,439.62	\$12,325,576.44	
	Estimate	\$11,584,143.78	6.40	\$741,432.66	\$12,325,576.44	\$0.00

This screen also shows the unit price and total price of each bid item. The costs of the child items and alternates are added to the regular item cost and a mark up is added to determine the price.

Sch	Item Cd	Descriptions	Quant	UoM	Unit Price	Total Price	EXIT
1	1	Mobilization	1.00	LS	161,725.55	161,726	▲
1		1 Temporary Striping	1.00	LS			
1		1 Testing	25.00	EA			
1	2	Curb & Gutter Type A-1	8,000.00	LF	45.88	367,040	
1	3	Curb & Gutter Type B-2	12,000.00	LF	11.57	138,840	
1	4	24" RCP Sub	4,500.00	LF	42.56	191,520	
1	ALT4	(24" RCP)	4,500.00	LF	40.82	183,690	
1	5	36" RCP Sub	3,360.00	LF	50.01	168,034	
1	ALT5	(36" RCP)	3,360.00	LF	51.16	171,898	
1	6	48" RCP Sub	1,500.00	LF	63.85	95,775	
1	ALT6	(48" RCP)	1,500.00	LF	64.30	96,450	
1	6A	Header Cut	112,530.00	LF	0.31	34,884	
1	7	60" RCP Sub	900.00	LF	71.29	64,161	
1	ALT7	(60" RCP)	900.00	LF	72.95	65,655	▼

Click on the middle button to display all levels of items such as child items and alternate items.

Top Toll Bar:



Click on this button to show bid items, child items, alternate items and the activities associated with each of these items.

Sch	Item Cd	Descriptions	Quant	UoM	Unit Cost	Total Cost	EXIT
1	1	Mobilization	1.00	LS	151,983.41	151,983	▲
		U Job Trailer	1.00	LS	99,142.96	99,143	
		Place Base Large Crew	1.00	LS	24,778.49	24,778	
		Backfill Curb & Gutter	1.00	LS	1,245.82	1,246	
		Excavation W\Excavator	1.00	LS	25,316.14	25,316	
1		1 Temporary Striping	1.00	LS	1,500.00	1,500	
		S Striping Sub.	1.00	LS	1,500.00	1,500	
1		1 Testing	25.00	EA	0.00	0	
1	2	Curb & Gutter Type A-1	8,000.00	LF	43.11	344,917	
		Medium Grading Operation	8,000.00	LF	31.18	249,445	
		Forming	8,000.00	LF	2.18	17,404	
		Curb & Gutter Pour	8,000.00	LF	6.42	51,334	
		Backfill Curb & Gutter	8,000.00	LF	1.63	13,044	
1	3	Curb & Gutter Type B-2	12,000.00	LF	10.88	130,512	▼

Bidding

After the estimate is substantially complete the next process is to prepare the bid. This of course is more than just adding up the total cost and applying a markup. The estimate will automatically feed the unit cost for each item to the bid program along with the components of cost such as labor and equipment.

The bid program essentially offers a spreadsheet approach accompanied by some analytical tools and the ability to do a wide variety of item pricing. The key features are:

1. **Risk Analysis** - This subject has filled many text books and we will not try to deal in depth with it here. The general concept allows the evaluation of different components to be evaluated according to risk involved with each component. For example, some estimators might consider labor a higher risk component than say a relatively low risk item like material. In the bidding process an estimator should be able to mark up his bid based on different types of cost or different groups of items. Manually this would be very difficult, however, a computer greatly simplifies this task.
2. **Subcontract/Material Evaluation** - The purpose is to group items by subcontractor or material type and then accept several bids for the group and let the computer evaluate and update the items with the chosen subcontractor or material vendor.
3. **Bid Manipulation** - This feature allows unbalancing and last minute bid adjustments. If you have closed an item or written it in your bid and then received a last minute change then you can enter this change and have it updated instantly.

There are many other features that are included but this gives you a general idea of some of the functions of the bid program.

Building an Estimate - General Overview

The first step in building an estimate is to enter the individual bid items. This is done immediately after entering the basic job information. The system has the flexibility to change items after they have been entered. Each item is numbered consecutively along with an item description and quantity. Lump sum items are indicated as a quantity of one.

You may also enter items using the Simple Bid method. A minimum of information is required to describe the bid, then pre-defined items and activities can be used to develop the bid simply by picking and choosing among them.

The items in a bid can be assigned to categories to group like bid item types together . For example, INT might be used for all internal work, or SELC for sub-contracted electrical work.

After all the bid items are entered, the item cost is built. This is done through activities. Activity costs are built as details of labor, equipment, material, transportation, sub/service and other. The activity details may be filled in using standard crew codes.

Once the activities are created for the items, various mark up techniques can be used to generate a final price.

The following screen shows how all the elements of the cost for an activity are defined:

Schedule: 1 Item: 9 Aggregate Base Quantity: 33000 TN

Act Code: GRDL Description: Large Grading Operation Act Qty: 542,700.00 [SF] EXIT

Crew Code: None Crew Desc: ActQtyDesc: Acctg Code: GRDL

Labor/Equipment | Material / Other | Transportation/Sub | ALL

LABOR	Detail	Description	Qty	Hrs	Days	\$ Rate	\$ Total	Plu
	OFOR	Foreman, Operator	1.00	8.00	9.0	41.00	2,9E2	<input type="checkbox"/>
	LGCU	General Cleanup Laborer G-1	1.00	8.00	9.0	36.91	2,6E7	<input type="checkbox"/>
	OROL	Roller Operator G-5	1.00	8.00	9.0	41.00	2,9E2	<input type="checkbox"/>
	LGC	Labor Guitea Chaser	1.00	8.00	9.0	36.91	2,6E7	<input type="checkbox"/>
	OBLD	Operator Blade	2.00	8.00	9.0	41.00	5,9C3	<input type="checkbox"/>
	TMSTR	Teamster	1.00	8.00	9.0	36.35	2,617	<input type="checkbox"/>

Hours: 8 Days: 9
 Labor: 8 9
 Equip: 8 9
 Both: 8 9
 Rate/Day: 60,000.00
 Rate/Hr: 7,500.00

Total Labor Cost: \$19,738.08

EQUIPMENT	Detail	Description	Qty	Hrs	Days	\$ Rate	\$ Total	Plu	RntRt
	RGRDV	Roller Grade Vibratory	1.00	8.00	9.0	45.0	3,240	<input type="checkbox"/>	<input type="checkbox"/>
	RWT35	Rent Water Truck 3500 Ga	1.00	8.00	9.0	75.0	5,400	<input type="checkbox"/>	<input type="checkbox"/>
	SCR15	615 Scraper	1.00	8.00	9.0	78.0	5,616	<input type="checkbox"/>	<input type="checkbox"/>
	B140	Cat 140 Blade	2.00	8.00	9.0	55.0	7,920	<input type="checkbox"/>	<input type="checkbox"/>
			0.00	0.00	0.0	0.0	0	<input type="checkbox"/>	<input type="checkbox"/>

Labor Daily: \$2,193.12
 Labor/ActUnit: \$0.04
 Equip Daily: \$2,464.00
 Equip/Act Unit: \$0.04

Total Equipment Cost: \$22,176.00

Save Crew to Master Show All Crew Type: Regular

The activity is Large Grading Operation, with an activity code of GRDL. It is defined by the crew GRDL, Large Grading Operation. The activity's quantity is 542,700 square feet. The details for labor and equipment are shown. There are other screens for Material and Other, Transportation and Subcontractor, and a screen that combines all costs for the activity. The additional screens are accessed by either clicking on the tabs or using page up and page down



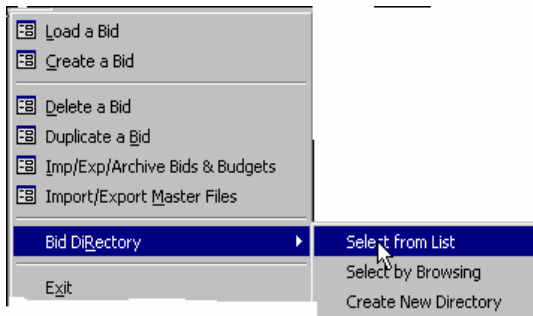
Chapter 3 - Building the Data Files

The fundamental concept for building the data files is that the work details establish the basic foundation for the program. Activities are simply groups of details. As a short-cut to entering details, crews (detail groups) can be created and saved. These crews can then be assigned to an activity to allow the details to be loaded whenever the activity is referenced.

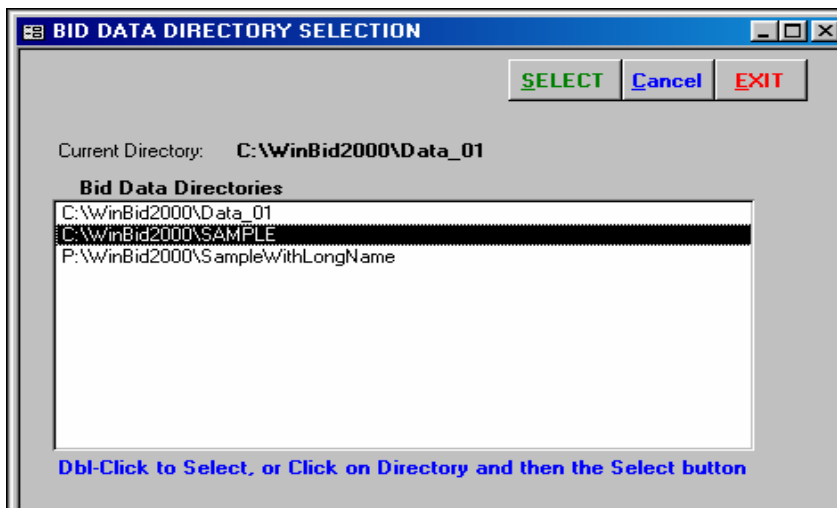
Setting the Bid Directory

The program is supplied with sample data to give you some idea as to what a completed bid will look like. This information is stored in the SAMPLE directory. If you wish to store the details you create in another directory, you can store them in the DATA_01 directory which is already set up in Winbid 2000 or you can create another bid directory.

To access the DATA_01 or the SAMPLE directory, click on Bids, highlight Bid Directory and then choose Select from List or Select by Browsing. The menu will look like this:

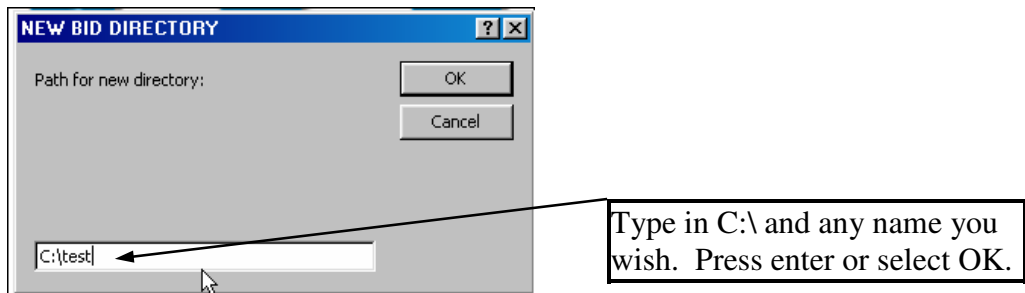


If you choose Select from List, then the following screen will appear:



Highlight the directory you wish to choose and click the Select button or Double Click on the directory.

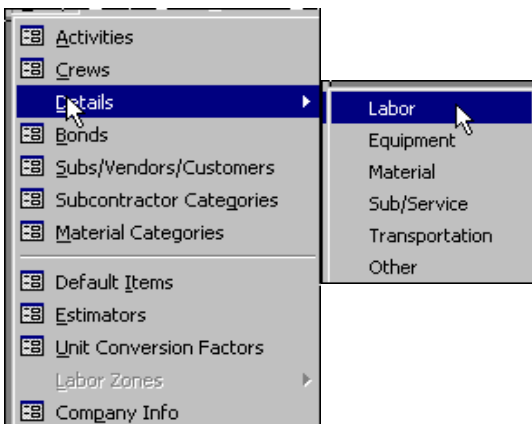
To create a new directory, choose Create a New Directory from the Bid Directory Menu. The following screen will appear:



The new directory automatically becomes the current directory. All new information will be saved in the current directory.

Setting Up Details

Details are the building blocks of estimating. The details that make up activities determine the cost of an item. Since you'll be using details to create activities and crews, it is a good idea to start by creating details. There are six categories of details: Labor, Equipment, Materials, Transportation, Sub/Service, and Other. From the Setup menu, highlight Details. A list of the six detail types will be displayed. Click on the detail type you want to work with.



We will use labor as an example. After you click on the Labor cost type, you will see the following screen:

The screenshot shows a software window titled "DETAILS". At the top, there are buttons for "New Record", "Delete Detail", "Cancel", and "EXIT". Below these is a table with columns for Detail Code, Description, and Unit Cost. The table contains several entries, with "LAS Asphalt Shoveler Laborer G-2" highlighted. To the right of the table is a "Type" pull-down menu with "Labor" selected. Below the table, there are fields for "Detail Code", "Unit Cost", "Fixed Overhead", "Accounting Code", and "Category". At the bottom, there is a table with columns for "Zone", "Unit Cost", "Fixed OH", and "Variable OH".

Detail Code	Description	Unit Cost
CA	Lay Out C...	32.87
GFOR	General Foreman	42.75
GRDCH	Grade Checker	40
LAB	Laborer	35
LABLA	Laborer Landscape	34.65
LANTEN	Landscape Tender	23.8
LAR	Asphalt Raker Laborer G-4	36.90
LAS	Asphalt Shoveler Laborer G-2	36.90

The pull-down menu allows you to choose a detail code that you set up previously.

To enter a new detail code, click on New Record and enter a new code into the Detail Code field. You can use up to 6 characters for the Detail Code. It must not be used by any other detail. The program will tell you if you accidentally put in a duplicate Detail Code.

Note:
Use detail codes that mean something. Give thought to your code structure before you start, then stick with your conventions throughout.

Once a valid Detail Code is entered, type in a Detail Description. Use up to 30 characters to describe the detail.

The Unit Cost of the item is entered next, then Units of Measure. A total rate is automatically computed and displayed in the Rate field.

If you are entering a Material, Transportation, Sub/Service, or Other field, then the Fixed Overhead and Variable Overhead fields will not appear since they don't apply.

The next field on the screen is the Code for the Accounting System. If you are going to upload budgets into a cost accounting system, this field should be entered with the detail cost to use during the upload. For example, you may have three types of general laborers in the estimating system, but the accounting system may only use one code to reference a general laborer. For each of the three general laborer codes, you can specify the same code for the accounting system. This will pass the single general laborer code into the cost accounting system.

The last field is Category. Categories allow for the grouping of similar details. Examples are Subcontractor and Internal. See further explanation under **Setting Up Categories**.

When all of the fields are filled out, press <EXIT> and the detail will be saved.

Deleting a Detail

To delete a detail, click on the Delete Detail button. Once deleted, the detail can not be recovered.

Changing Cost Type

You can change the cost type while in a detail entry screen by using the pull down menu on the right-hand side of the screen.

You cannot have two details with the same code but different cost types; all detail codes must be unique.

The screenshot shows a software window titled "DETAILS". At the top, there is a "Detail Selection:" dropdown menu and a row of buttons: "New Record", "Delete Detail", "Cancel", and "EXIT". Below this is a "Cost Type" dropdown menu currently set to "Labor".

The main form area contains the following fields:

- Detail Code:** A text box containing "02".
- Description:** A text box containing "Lay Out Carpenters Grade 5".
- Unit Cost:** A text box containing "\$18.560".
- Units of Measure:** A text box containing "HR".
- Fixed Overhead:** A text box containing "\$8.75".
- Variable Overhead:** A text box containing "30.00".
- Total Cost:** A text box containing "\$32.88".
- Accounting Code:** A text box containing "CA".
- Category:** A text box containing "CAR".

At the bottom of the window is a table with the following data:

	Zone	Unit Cost	Fixed OH	Variable OH
▶	NoCA	18.56	8.75	30.00
	SoCal	18.56	8.75	30.00
*		0.00	0.00	0.00

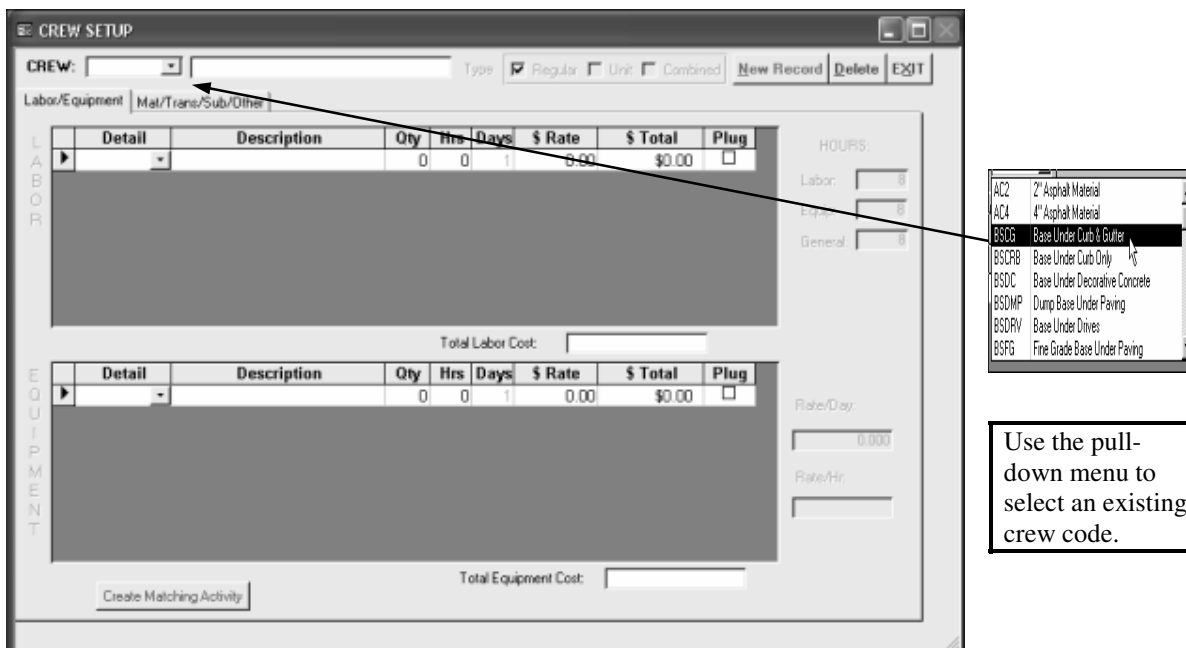
Setting Up Crews

A crew is a shortcut way of entering details. If you are building a worksheet with an activity that has two laborers and a skip loader, you can enter the details one at a time. The next time you want to put together the same activity on a different worksheet, you once again enter the details one at a time. In order to make this process more efficient, a crew can be assembled with two laborers and a skip loader. The crew code is entered at the worksheet and all the details for the crew will be pulled into the activity.

You also specify what the production rate of the crew is, and the number of hours per day the crew will work.

When you retrieve a saved crew, the details are pulled out of the detail database so that the detail used in the worksheet will always be current.

To assemble a crew, click Setup on the main menu bar and choose Crews from the pull-down menu. The following screen will appear:



Use the pull-down menu to select an existing crew code.

In order to enter or change details of labor, equipment, materials etc., first you must enter a crew code or select one from the existing crew codes by using the pull down menu. You can also type one or two letters of an existing crew code and the code will automatically appear. Press <ENTER> and the details for the existing crew will be displayed. Once you have done this, you can move among the details by clicking on the tabs (Labor/ Equipment or Mat/ Trans/Sub/Other).

To create a new crew, simply type in a crew code and press <ENTER>. If the crew exists, then it will be pulled up and displayed on the screen. If the crew does not exist, then the cursor will move to the Description field and wait for you to type in a Crew Description. It can be up to 30 characters long.

Once a Crew Description is entered, the cursor will highlight the first cell under the Labor category. If you know the detail codes you want to enter, type them in and they will be pulled up and displayed. If you don't know the detail codes, you can view a list of the details by using the pull-down menu and selecting the detail to insert into the crew .

Continue pulling in details into the various categories and assigning quantities to them to assemble the crew. You should note that you cannot enter the same detail code twice.

Plug Details

A plug detail is a detail with unknown costs. For instance, the cost of asphalt concrete usually changes from job to job. In order to quickly recognize if you have filled in a cost for these types of details, you can flag them in the crew as having a token cost. When you fill in the cost for the detail, you can unflag it as having been completed. If you enter the cost of a material detail through material entry, it will automatically make the detail normal for you.

When entering details, the last column is 'PLUG.' Click on the box to designate the detail a PLUG. If a bid item has a plug detail in one of its activities, the word 'PLUG' will appear above the unit cost field on the main bid screen. This will tell you at a glance if there is a detail without a proper cost behind the item. Double-clicking on the button will bring up the detail that has the plug. To make the detail normal, click on the box again to uncheck it.

Labor Costs

You can change the labor cost by changing the number of hours in a day or the number of people needed on the crew. For instance, if the crew only works for six hours per day, click on the Hours field and enter a 6 here.

Saving a Crew

When you are done and wish to save the crew, Click on the Exit button and answer yes to the question asking to save the crew. If you answer no, all changes will be lost.

Deleting a Crew or Crew Details

To delete a crew, type in its code at the Crew field and press <ENTER>. If the crew exists, it will be loaded into the worksheets. Press the Delete button.. This will delete the crew. If you delete a crew it cannot be recovered, so be sure this is what you want to do.

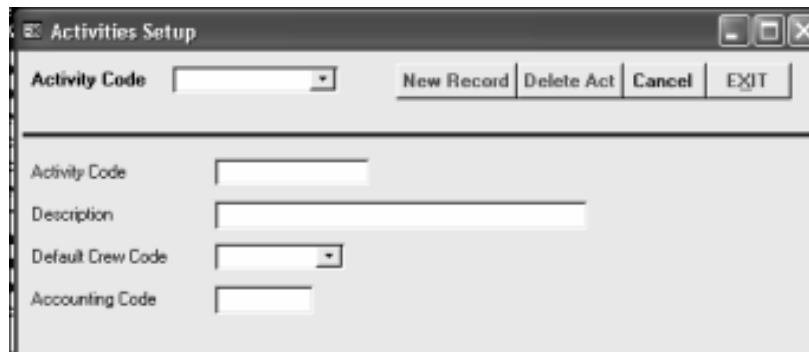
If you want to delete a detail from a crew, delete the detail code. A box will appear and ask you whether you want to delete that detail. Click Yes or No. If you delete a detail, it is still stored in the detail database so you can enter the detail code again and it will be pulled into the crew.

If you would like to create an activity with the same code, description, and details as the crew, click on **Create Matching Activity**.

Setting Up Activities

Eventually a bid item will have one or more activities or tasks associated with it, but first you must build a list of the activities before you can fill in a worksheet or start building an item's cost.

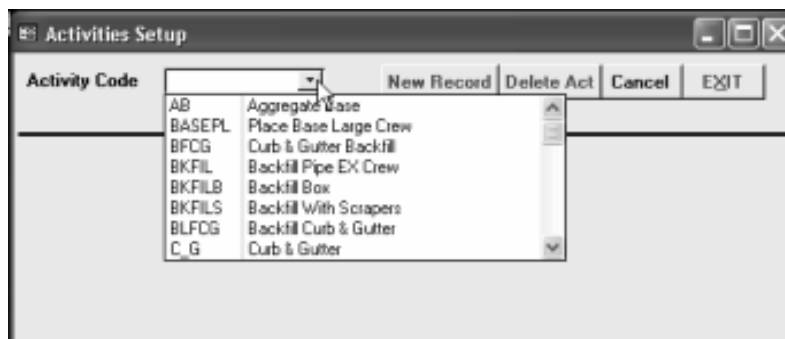
To set up activities, click on Setup from the main menu. Highlight Activities, and you will see the following screen:



At this point, the program is waiting for you to type in a new activity code. Up to 6 characters can be entered for an activity code. It must not be used by any other activity, and the program will tell you if a duplicate activity code is entered.

Once a valid activity code is entered, the cursor will be on Activity Description. The description can be up to 30 characters long.

To select an existing Activity Code, use the pull down menu, as follows:



To have a crew loaded whenever you specify this activity on a worksheet, you can fill in the Default Crew Code field. If the crew code specified does not exist, you must create a new crew. See **Setting Up Crews**.

If you want to view a list of all the crew codes in the database, use the Crew Code pull down menu.

Note:

Frequently you will find it helpful to have the activity code and the crew code the same.

Click on the <EXIT> button to save the activity.

To change an activity, click on the field to change. If you change the Activity Code, a new activity will be created with the new Activity Code, and the old activity will be left unchanged. In this way you can create one activity, modify it with a new Activity Code, and create other activities.

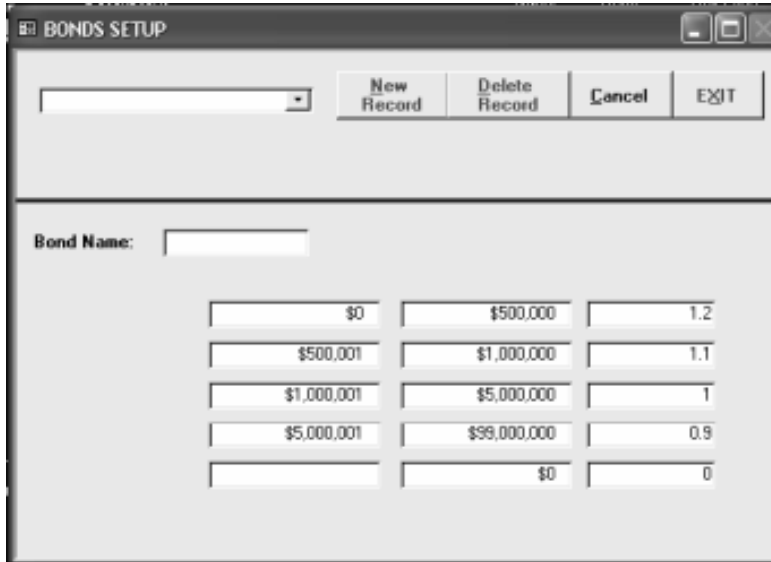
The last field on the screen is the Code for the Accounting System. If you are going to upload budgets into a cost accounting system, fill in this field with the code to use for this activity during the upload. For example, you may have three types of paving activities in the estimating system, but the accounting system may only use one code to reference a paving activity. For each of the three paving activity codes, you can specify the same code for the accounting system. This will pass the single paving activity code into the cost accounting system.

Pressing <EXIT> will save the Activity to the hard disk. If, however, the Activity Code or Description is left blank, the program will ask you to enter it before you are allowed to exit. The Default Crew Code and Code for the Accounting System do not have to be filled in to exit.

To delete an activity, use the pull-down menu to select the activity to be deleted and press the Delete Act button. The program will ask if you want to delete this activity, and if you answer yes, the activity will be deleted. There is no way to recover a deleted activity, so make sure this is what you really want to do.

Setting Up Bonds

The program will allow you to spread a bond cost to items you select based on bond percentages you specify. The system will store up to five different bond rates, which you can view or change by highlighting Bonds from the Setup menu.



The pull-down menu will display a list of the bonds in the system. To view or change one of the bond definitions, highlight it and the related information will be displayed. The 'From' amounts are listed on the left, the 'To' amounts in the middle, and the percentage is on the right. The from amounts are filled in automatically, and the percentages are listed to four decimal places.

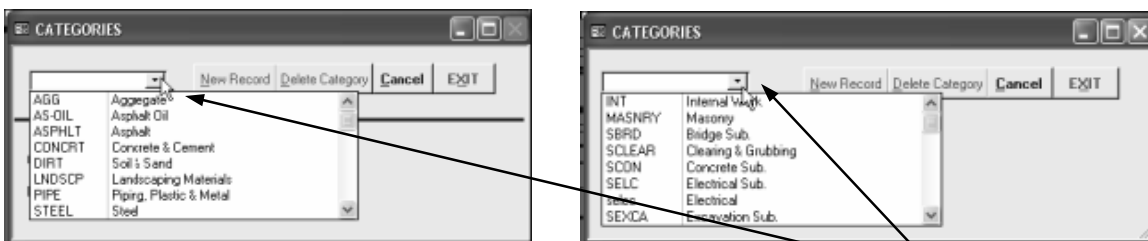
Once the percents have been filled in, press the Exit button and the program will save them automatically.

To insert a new bond rate, press the New Record button and fill in the name and blank fields.

To delete a bond, press Delete Record button and the program will delete the bond definition from the system.

Setting Up Categories

To add or delete Categories, click on Material Categories or Subcontractor Categories from the Setup menu. You'll see these screens, respectively:



You may either enter a new category code into the blank box or use the pull-down menu to select an existing category.

Pressing the exit button will save the changes you make.

To delete a category, highlight the category on the pull-down menu and then click on the Delete button.

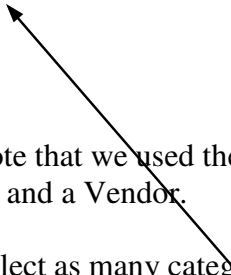
Setting Up Subcontractors, Vendors and Customers

To setup subcontractors, vendors or customers, choose Subs/Vendors/Customers from the Setup menu. At the first screen, click on New Record and the following screen will appear

The screenshot shows a software window titled "SUBS/VENDORS/CUSTOMERS". At the top left is a "Selection:" dropdown menu. To its right is an "Order By:" section with radio buttons for "Name" (selected) and "ID". Further right are four buttons: "New Record" (green), "Delete Record" (red), "Cancel" (blue), and "EXIT" (red). Below this is a horizontal line. The main area contains two columns of text input fields. The left column includes: Company Name, Address (two lines), City, State, Zip, Phone, and Fax. The right column includes: Contact Name, License, Minority, Percent Minority (with a "0" in the field), Minority Cert, and ID Code. At the bottom of the form are three checkboxes: "Vendor", "Subcontractor", and "Customer". Three arrows originate from the text below and point to each of these checkboxes.

Fill in all the applicable information and then click on the box to the left of Vendor, Subcontractor or Customer. Note: a Company can be one or all three (Vendor, Subcontractor and Customer). Winbid 2000 allows you to select all three if you so choose.

If you choose Subcontractor and/or Vendor, a category screen will appear which will allow you to assign the subcontractor or vendor to the appropriate categories using pull-down menus. See the screen on the next page that illustrates a Vendor that is also a Subcontractor. To setup a new category, **see the Setup Categories** section above.



In the sample screen above note that we used the pull-down menu to choose ABC nursery which is both a Subcontractor and a Vendor.

Winbid 2000 allows you to select as many categories as the vendor or subcontractor supplies. Once you choose a category from the available pull-down menu another pull-down menu appears below it so that you can select another category, if desired. In this example, ABC Nursery supplies dirt and landscaping. To delete a category, click on the Delete Cat button.

To delete a Subcontractor, Vendor or Customer, click to the Delete Record button at the top right hand corner of the screen.

Note

If you delete a record, all the information associated with that Subcontractor, Vendor or Customer will be lost.

Setting Up Default Items

Default Items are standard items with activities that can be pulled in while creating a Simple Bid and give the estimator a good starting point for his bid, complete with estimated costs in the items.

To setup, change or delete default items, select Default Items from the Setup menu. A default item list will appear:

Sch	Item Cd	Descriptions	Quant	UoM	Unit Price	Total Price	EXIT
1	1	Mobilization	1.00	LS	1,945.92	1,946	
1	2	Roadway Excavation	1,900.00	CY	44.55	84,645	
1	3	Curb And Gutter Atype A	675.00	LF	10.95	7,391	
1	4	Curb Only, Type B	675.00	LF	9.86	6,656	
1	5	Sidewalk	2,500.00	SF	3.15	7,875	
1	6	Subcontracte	250.00	LF	27.38	6,845	
1	7	Catch Basin,	1.00	EA	0.00	0	
1	8	Street Light	7.00	EA	2,080.50	14,564	
1	9	Aggregate Ba	2,500.00	TN	22.34	55,850	
1	10	Asphalt Conc	2,500.00	TN	5.71	14,275	
1	11	Shrubbery	1.00	EA	0.00	0	
ZZ	DST001	Curb Grade I	1.00	LS	0.00	0	
ZZ	IND001	Miscellaneous	1.00	LS	0.00	0	

MU %	Markup	Price per Unit:	Total Price
9.52	684.60	3.15	7,875.00
9.52	684.60	3.15	7,875.00

kup	\$ Markup	Total Bid Price	Balance:
50	\$17,359.61	\$200,046.17	\$0.00
50	\$17,359.61	\$200,046.17	\$0.00

Highlight an item and right click on it. A menu bar will appear that will allow you to modify, add or delete activities or items from the existing default items list.

Note:

Similar to the bid items screen discussed in Chapter 2 the default item screen also has three levels in which to view the items and activities. Refer to Chapter 2 for further detail. The example above shows the item level only.

Setting Up Estimator Names

In order to keep track of an estimator's performance, you must first enter the person's name who is estimating the job into the system. To do this, select Estimators from the Setup menu.

When the first screen appears, click on the New Record button. Then enter the name and number of the estimator. The number is normally an employee number. Every estimator must have a unique number. Once you have entered both the name and number, click on the Exit button and information will be saved.

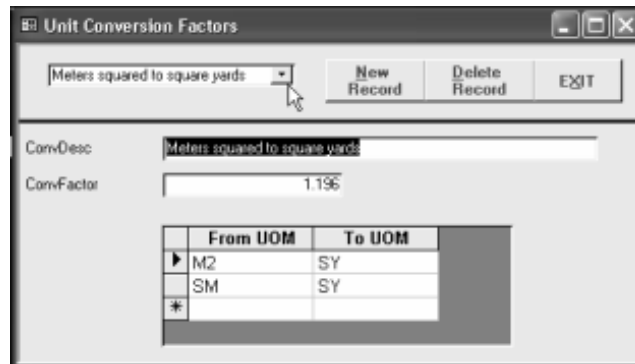


Use the pull-down menu to view estimators currently in the system or to change or delete existing estimators. Click on the Exit button and all changes will be saved in the system.

Once the Activities, Crews, Details, and Estimator Names have been entered, building the job can begin.

Setting Up Units of Conversion

If a bid item is given in cubic yards and the material you would like to buy is sold in tons, you would use unit conversion to determine how much material to buy. Select **Unit Conversion Factors** from the Setup Menu. The following menu will appear.



Either enter a new conversion factor or use the pull-down menu to select a conversion factor. Fill in a description; the description is the same as the name in the pull-down menu. The conversion factor is the number the given unit is multiplied by to become the end unit. In the graph at the bottom, you can enter the units that are affected by the conversion. Click on Exit to save.

Note

The conversions will not automatically be used. When you add an item, you are able to choose a unit of conversion and will see the results.

Labor Zones

If you would like to create a new Labor Zone, select **Create & Modify** from Labor Zones in the Setup menu. In the window that appears, click New Zone. You will be asked to enter up to six characters for the new zone code. Then you will be asked to enter a zone description. At this point you can enter laborers from the zone. There are then blanks for base cost, fixed cost and variable costs. Total cost is calculated for you.

The screenshot shows a window titled "Related Zone Detail Modification" with buttons for "Update Zone" and "Exit". Below these are two "Zone Code" dropdown menus, one containing "NoCA" and "Northern California", and a "Use Default" button. The main area is a table with the following data:

Code	Description	Base Cost	Overhead Fixed	Var%	Total Cost	Base Cost	Overhead Fixed	Var%	Total Cost
CARLO	Lay Out Carpenters Grade 5	18,560	8,750	30	32,876	0.000	0.000	0	0.000
GFOR	General Foreman	25,000	10,250	30	42,750	0.000	0.000	0	0.000
GRDCH	Grade Checker	40,000	0.000	0	40,000	0.000	0.000	0	0.000
LAB	Laborer	35,000	0.000	0	35,000	0.000	0.000	0	0.000
LABLA	Laborer Landscape	34,650	0.000	0	34,650	0.000	0.000	0	0.000

To modify a labor zone, select an already created zone from the pull-down menu or click on update zone. You can change the overhead costs or laborers at this time. Click on Exit to save changes.

Company Information

Company information is where you enter facts about your company. Click on Exit to save changes.

The screenshot shows a window titled "Company Information" with an "Exit" button. The fields are filled with the following information:

Company Name: ABC Constructor
 Addr1: 123 Qual Court
 Addr2:
 City: Santa Paula
 State: CA
 Zip: 93060
 Area Code: 555
 Phone: (555) 555-0550 FAX: (555) 555-0399
 Dial Prefix: 0 Long Distance: 1
 User Name: John Smith
 User Title: President
 Co. Short Name: 123C



Chapter 4 - Creating a Simple Bid

The idea behind Simple Bid is to allow the estimator to quickly generate a small bid. The Simple Bid screen does not show estimated costs and offers a minimal amount of bid summary information. Default items, complete with crews, can be recalled easily during item entry. This means that by the time you see the main bidding screen, you will already have activities behind the items.

To create a simple bid, select Create a Bid from the Bids menu.

A screenshot of the 'BID SUMMARY' software window. The window title is 'BID SUMMARY'. At the top right, it shows 'Today: Thursday, August 01, 2002'. Below that, the 'Bid Directory' is set to 'C:\WinBid2000\SAMPLE'. There is a 'Select Bid' dropdown menu with 'Anaheim Downtown' selected. To the right, 'First Bid Date' is '4/23/2002' and 'Last Bid Date' is '8/21/2002'. Below the dropdown, there are 'Filter By' options for 'Est' and 'Cust'. The main form area contains fields for 'BidName' (Anaheim Downtown), 'Agency/Customer' (Anaheim, City of), 'BidDate' (5/27/2002), and 'BidTime' (2:00:00 PM). There are also fields for 'Estimator' (Bob Preston), 'DefMarkup' (10%), and 'Dec Place/itm Qty' (2). Buttons for 'Open Estimate', 'Cancel', 'EXIT', and 'More Info' are visible.

A modicum of information is first entered describing the bid, then the bid items are defined. The cursor should be flashing in the Bid Name field at the top of the screen.

Type in a name to describe the bid, then press <ENTER>.

Type in the name of the agency or customer, then press <ENTER> or use the pull-down menu to select an existing customer. If the agency or customer does not already exist in the system, then click on the Add Customer button and create a new customer.

Enter the date and time for the bid. Click on the Get Date button to show a current calendar in which to select a date. Then, use the pull-down menu to select a time and press <ENTER>.

A box will pop up showing a list of all the estimators who have been defined. Click on the estimator for this bid. If an estimator name you need isn't in the existing list, enter the Estimator by clicking on the Setup menu from the main menu and selecting Estimators. See the **Setting up Estimator Names** section in Chapter 3.

Next, enter a default markup percentage for the items, then press <ENTER>.

Default Items

After entering all the information about the bid, click on the Open Estimate button. The add Items screen will appear. To define the items of work for this bid, either use the traditional method of entering an item or use default items. To use default items, click the Cancel button on the Add Items screen, and this will bring up the Bid Items screen. In a new bid, this screen will not yet show any items.

Sch	Item Cd	Descriptions	Quant	UoM	Unit Price	Total Price	EXIT
Item to Copy							
Cat: <input type="text"/>							
Item		Cost per Unit:	Total Cost:	MU %:	Markup \$:	Price per Unit:	Total Price:
Actual		0.000	0.00	0.00	0.00	0.00	0.00
Estimate			0.00	0.00	0.00	0.00	0.00
Bid		Total Bid Cost:	% Markup:	\$ Markup:	Total Bid Price:	Balance:	
Actual		\$0.00	0.00	\$0.00	\$0.00	\$0.00	
Estimate		\$0.00	0.00	\$0.00	\$0.00	\$0.00	

On the main menu, click on Items and then click on Get Default Items, that will bring up a list of Default Items and the associated activities.

- Add/Change Items ▶
- Enter Sub Costs
- Enter Material Costs
- Open/Close Items
- Get Default Items ←
- Reorder Items ▶
- Item Display Selection ▶
- Import Items from File ▶
- Export Items to File ▶
- Phases ▶

SELECT DEFAULT ITEMS/ACTIVITIES

Use Current Bid Use Different Bid Cancel Exit

Sort by Category:

Ph	Item	Description	Activity Descriptions
1	1	Unclass Excavation	
1	2	Base Material	
1	3	Curb & Gutter	
1	4	Driveway 6"	
1	5	Sidewalk	
1	6	24" RCP	
1	7	Asphalt	
1	8A	Cold Planing 2'	
1	9	Cold Planing Header Cut	

Add Item to Bid Add Acts to Bid

Highlight the item you wish to add to the bid and click on the Add Item to Bid button. The system will ask you if you want to adjust Item & Activity quantities during copy. Clicking “No” will copy the default item and activities exactly “as is” into the new bid. If you do want to change quantities, click “Yes” and the system will stop on each quantity and allow you to change it before placing it into the new bid.

Entering Items (using the Traditional Method)

To create an item using the traditional method, click on Items from the Main Menu, then select Add/Change Items, then click on **Add Regular Item**.

SchNo	Item No	Item Description	Quantity	U/M	Category	Unit Cost Guess
1	1		1.000		INT	\$0.00

AgencyNo: _____

CANCEL SAVE & ADD ANOTHER ITEM SAVE & EXIT

T/O Qty: 1 Use TakeOff Qty

Conv Factor: NO conversion Add Conv

x 1.00 = Conv Qty Conv UoM

SchNo	Item No	Item Description	Quantity	U/M	Category	Unit Cost Guess
1	1		1.0			.00

On the Add Item Screen, fill in the schedule, item number, description, quantity, and unit of measure.

The item category defaults to INT, internal work. If you wish to change it, use the pull-down menu for a list of all valid categories.

If the category you enter is not in the category file, the program will ask if you want to add it to the category database. If you decide to create the category, you will be prompted for a description for it.

Copying A Master Job

Before any items are entered, however, you have the option of copying all the items and activities from another bid. As soon as you enter the first item for this bid, however, you will not be able to copy a bid into this one.

To copy a master job, Click on the Bids Menu and then select **Duplicate a Bid**. The following screen will appear:

Today: Thursday, August 01, 2002		
Filter By: Est [] Cust []		
First Bid Date: 4/23/2002 Last Bid Date: 8/21/2002		
Range ALL		
Sort By: Description Date Customer		
Hometown Avenue	12/25/2000	Preston Construction Co.
simple bid	7/22/2002	Anaheim, City of
Tutorial	7/19/2002	Anaheim, City of
Los Angeles Street	6/21/2002	City of Los Angeles
Anaheim Downtown	5/27/2002	Anaheim, City of
Rolling Hills Lane	5/5/2002	Preston Construction Co.
Parking Lot	4/15/2002	City of San Diego
City Development	3/20/2002	Anaheim, City of
Main Street	2/20/2002	Anaheim, City of

Highlight the bid you wish to duplicate and double click.

In this manner, you can create master jobs which can be used as templates for other jobs.



Chapter 5 - The Bid Screen

After loading a bid and opening the estimate, the program will display the bid items screen:

Sch	Item Cd	Descriptions	Quant	UoM	Unit Price	Total Price	EXIT
1	1	Mobilization	1.00	LS	161,725.55	161,726	
1	2	Curb & Gutter Type A-1	8,000.00	LF	45.88	367,040	
1	3	Curb & Gutter Type B-2	12,000.00	LF	11.57	138,840	
1	4	24" RCP Sub	4,500.00	LF	42.56	191,520	
1	5	36" RCP Sub	3,360.00	LF	50.01	168,034	
1	6	48" RCP Sub	1,500.00	LF	63.85	95,775	
1	6A	Header Cut	112,530.00	LF	0.31	34,884	
1	7	60" RCP Sub	900.00	LF	71.29	64,161	
1	8	Excavation	21,500.00	CV	46.30	995,450	
1	9	Aggregate Base	33,000.00	TN	11.93	393,690	
1	10	AC Base Course	7,000.00	TN	101.84	712,880	
1	11	Header Cut	112,530.00	LF	0.96	108,029	
1	12	Ac Surface Course	35,600.00	TN	53.35	1,899,260	
1	13	Adjust Manholes	142.00	EA	165.81	23,545	

Item	Actual	Estimate	Cost per Unit	Total Cost	MU %	Markup	Price per Unit	Total Price	Cat	CalGrip#
	40.000	40.000	180,000.00	180,000.00	6.40	11,520.00	42.56	191,520.00	SSTORM	1

Bid	Actual	Estimate	Total Bid Cost	% Markup	\$ Markup	Total Bid Price	Balance
	\$11,584,136.82	\$11,584,143.78	6.40	\$741,439.62	\$12,325,576.44	\$0.00	

A list of the items in the job is displayed on the top half of the screen. The middle of the screen shows the unit and total cost for the item, the percent and dollar amount it has been marked up, and the unit and total price for the item. The bottom of the screen shows the bid totals for both actual prices and estimated prices. Initially, a job won't have any estimated costs worked up for it so the estimated bid cost will be 0.

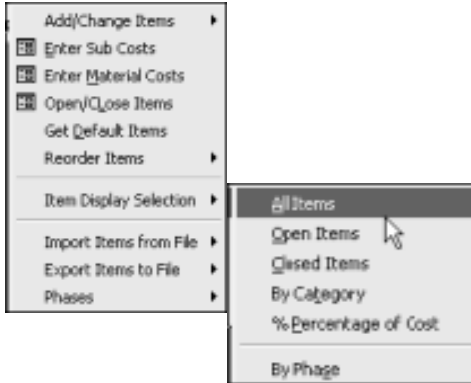
The balance of the bid is 0 now, but when activities are put into this bid and estimated costs for the items are worked up the balance will represent the difference between the Actual Bid Price and the Estimated Bid Price.

On color systems, the actual costs are shown with blue text against a white background. The estimates are shown in gray. You can change any numbers on the blue line (Actual) but not on the gray line (Estimate). The numbers on the gray line come from the activities you assign to the items. Whenever you change one of the numbers on the blue line, the program calculates the other numbers, then recalculates the entire blue line based on unit price.

You can try changing different numbers and seeing which numbers change. For instance, changing the unit price will affect the total price, the percent and dollar margin, but not the unit cost or total cost. The program uses a sophisticated algorithm to determine the amounts

Limiting the Items Displayed

You can limit the items being displayed. From the items menu, click on Item Display Selection.



You can limit the displayed items to only the items that are open, the closed items, items that fall into categories you select, and the items that make up a certain percentage of the job. If you want to know where the money is in this job, you could ask for all the items that make up 75% of the job by highlighting or clicking on % Percentage of Cost and entering 75.

You can also view only those items that are in certain phases. Click on By Phases. If the bid has more than one phase, you will see a list of all the phases in the bid. Click on the phases to be displayed and press <ENTER>.

Phase Totals

From the Items menu, select and click on Setup Phase Totals. This screen will appear:

A screenshot of a dialog box titled 'PHASE SELECTION'. It has a text input field at the top with the prompt 'Select All Phases You Want Included In Bid Totals:' and 'Cancel' and 'EXIT' buttons. Below is a table with columns for 'Select', 'Sch', 'Description', 'Schedule Total Cost', and 'Schedule Total Price'.

Select	Sch	Description	Schedule Total Cost	Schedule Total Price
1		Main Bid	5,461,529.83	5,811,179.68
2		Alternate to bid 1	5,861,646.99	6,236,352.19
A		City Hall Property	194,535.00	206,445.50
B		Alternate to A	66,425.00	71,599.15
C		Schedule C	0.00	0.00

The phases in the bid are listed on the bottom of the screen, along with their cost and price. The cursor is in the top box, allowing up to ten different combinations to be added or subtracted. The results of the phase combinations you define will be included on reports.

Including/Excluding Phases from the Bid Totals

For multiple schedule bids, you can specify which phases are to be included in the final bid totals. In this way you can evaluate several different ways of estimating a job and easily specify which phases to include in the bid. If you click on the Items menu and then select Phases, a new menu will appear. From this menu, click on Phases in a Bid Total and a list of the phases in the job appears.

Select	Sch	Description	Schedule Total Cost	Schedule Total Price
<input checked="" type="checkbox"/>	1	Main Bid	5,861,529.83	5,811,179.68
<input type="checkbox"/>	2	Alternate to bid 1	5,861,646.99	6,236,352.19
<input type="checkbox"/>	A	City Hall Property	194,535.00	286,445.58
<input type="checkbox"/>	B	Alternate to A	66,425.00	71,599.15
<input checked="" type="checkbox"/>	C	Schedule C	0.00	0.00

If no phases are checked, the program will use all the phases in the bid totals. Z Phases will not appear in the list, since they are always excluded from the bid totals.

If you only want designated phases to be shown in the bid total, then click on the phases that you want included. A check mark denotes that the phase is selected. Once the phases are checked off, click on the Exit button and the bid totals will change to reflect only the items that are within those phases.

When you print a report, the bid totals in the report will reflect only those phases that are included in the bid.

Cost Breakdown by Cost Type

After you have an estimate generated for the bid, you can press Shift-F4 to show how the estimated cost breaks down into the six categories of Labor, Equipment, Materials, Transportation, Sub/Service, and Other. This is the cost breakdown screen.

%	Unit Cost	Total Cost		%	Total Est
6.4%	\$2.79	\$59,906.37	LABOR	5.6%	\$645,701.82
28.7%	\$12.48	\$268,290.18	EQUIPMENT	5.3%	\$613,597.82
41.8%	\$18.20	\$391,376.00	MATERIAL	71.7%	\$8,298,883.42
10.8%	\$4.69	\$100,800.00	TRANSPORTATION	1.0%	\$117,237.00
0.0%	\$0.00	\$0.00	SUB/SERVICE	12.8%	\$1,484,801.80
12.3%	\$5.35	\$115,100.00	OTHER	2.5%	\$290,928.00
0.0%		\$0.00	BOND	1.0%	\$116,943.92
TOTAL:	\$43.51	\$935,472.55	Total Bid Cost		\$11,568,093.78

Balance Method

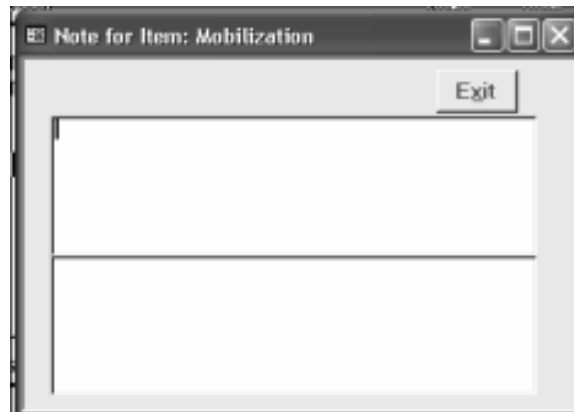
On the main bid screen in the lower right corner is a balance field. This shows the difference between the estimated and actual bid price. To calculate this difference the estimated bid price is subtracted from the actual bid price and then displayed in the balance field.

Category vs. Markup Displayed

The scroll area of the main bid screen defaults to displaying the categories for the items. You can switch this to displaying the percent markup for the items by pressing Shift-F3. To switch back, just press Shift-F3 again.

Item Notes

To add a note to any item, you can press F8 and a note pad will appear. Enter up to five lines of text here and then press <ESCAPE> to save the note. When you go to print a Detail report for the items, the notes will print out along with the item they refer to.





Chapter 6 - Creating a Bid

To create a bid, select Create a Bid from the Bids menu. Once the Bid Summary screen appears, fill in the Bid Name, Customer, Bid Date, Bid Time, Estimator, and Default Markup Percentage. All items entered will use this value as the percent to markup an items cost, but it's not a critical value since the markup can be manipulated in several different ways, as we will see in an upcoming chapter. So far, this is the same as in Creating a Simple Bid. Refer to Chapter 4 for more details. Once the initial Bid Summary screen is completed, click the **More Info** button.

Fill in the number of working days for the bid.

Fill in the Budget/Estimate line with a guess at what the budget for the job will be. This entry is optional. Once items are entered in the bid, this line will be replaced with the bid price for the job.

Fill in the Penalty/Day for the bid, if applicable. This shows the liquidated damage for exceeding the completion date or allotted time. This value is not used in any way, other than for purely informational value.

Many public works or government bids require the use of minority or women businesses. The minority fields are used for that purpose. Fill in the goals for minority businesses, women, and small businesses, if they apply. A total will be shown to the right, and if you want, you can enter a straight total for the minority percentage, rather than breaking it down into the three categories.

Fill in the Zone in which the job will take place.

Fill in a description of the bid.

All the fields in the More Information section of the Bid Summary are optional. If you forget to fill in a mandatory field, the program will not allow you to Exit and puts the cursor on the blank field.

When all of the fields are filled in, click the <EXIT> button to save the bid.

Entering Items

To begin entering items, click on Load a Bid from the Bids menu and select the Bid Name from the pull-down menu under Select Bid.

The Bid Summary information that was just entered should reappear. Click on the Open Estimate button. A box will pop up asking you for a description for the Schedule. Enter in the description or leave it as Schedule 1 and press <ENTER>.

A new Add Item screen will appear.

SchNo	Item No	Item Description	Quantity	U/M	Category	Unit Cost Guess
1	1		1.000		INT	\$0.00

AgencyNo: _____

T/O Qty: Use TakeOff Qty

Conv Factor: Add Conv

x = Conv Qty Conv UofM

Buttons: CANCEL | SAVE & ADD ANOTHER ITEM | SAVE & EXIT

The cursor should be at the Item Number field which is filled in with a 1. As you create items, the phase and item field always default to the next logical phase and item numbers. If this item number is acceptable, then press <ENTER>, otherwise, fill in the Item Number field with an item number.

Fill in a description for the item. When you are done, press <ENTER>.

Fill in the quantity for the item.

Fill in the units of measure for the item.

Fill in the category for the item. The category can be an important part of how you plan to use the program. It allows the items to be grouped. By grouping similar items, such as internal items, or sub items, you can utilize other parts of the program designed to work with these different categories. **Sub-Entry**, for example, needs the items to be grouped according to the type of sub work. Also, items can be displayed and printed according to categories you select.

After filling in the category, fill in a rough guess of what the item will cost per unit. This is used to establish a preliminary estimate of the total cost of the job.

After entering the Unit Cost Guess, press <ENTER> and the item will be saved automatically. The Unit Cost Guess is an optional entry. It will appear below the fields you are filling in as part of a scroll box. Every item that is added is put into the scroll box. You can move the cursor up and down to scroll through the items.

After you have typed in all the items, make a change to an item by clicking on the field to change.

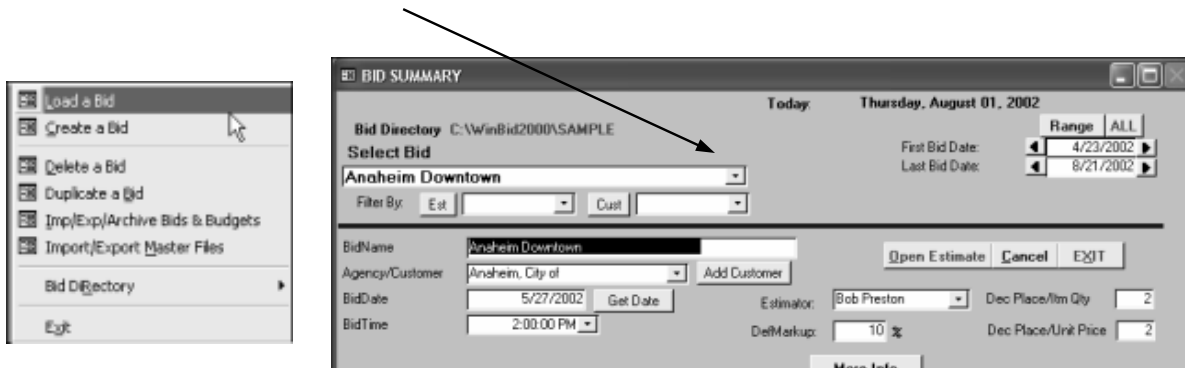
If you change the item number of an item, a new item will be created with the new item number and the item with the old item number will remain unchanged.

To add a new item, click on the Save & Add Another Item button.

To delete an item, right-click on the item and then click Delete. If you delete an item, there is no way to recover it, so be sure this is what you want to do. You cannot delete an item that has activities associated with it. You must make sure all the activities for an item have been deleted before you can delete the item itself.

Loading a Bid

From the main menu, under the Bids selection, choose Load a Bid by clicking the mouse cursor on it. Use the pull-down menu under Select Bid to choose from a list of bids.



Click on the bid you wish to load. A summary of the bid selected will be displayed. If you don't need to alter any of the data displayed, click on the Open Estimate button to continue or Exit to return to the main menu.

Z Phases

If you specify the first letter of an item's phase as Z, its cost and price will not contribute to the bid totals. Indirect and distributed are put into a Z phase. Their costs are put into spread into other items, so they do not need to be added into the bid totals as their own item.

Distributed and Indirect Items

If you want to designate an item as indirect or distributed, pull down the Items menu, highlight Add/Change Items, and select **Add Distributed Item** or **Add Indirect Item**. This will make the phase ZZ and the first three letters of the item number "IND" or "DST". Since the item number can only be a total of six characters, this leaves three characters for the prefix and three for the item number. Any item number beginning with IND or DST is treated differently and is not a regular item.

A distributed item allows an estimator to create a special item, then make a percentage distribution to several other regular items. This is an extremely powerful tool and saves considerable time, as several regular items may be estimated as one special item. The distributed item is never included in the cost totals, only the regular items that receive cost are included in the totals.

You enter a Distributed Item just as you would a regular item, with the only difference being the DST in the Item number. When you click on <EXIT>, this screen appears.

Phase	Item	Description	Quantity	U/M	UnitCost	TotalCost	%Dist
1	1	Mobilization	1	LS	3277.10	3277.10	0.0
1	2	Roadway Excavation	1900	CY	16.14	30657.83	0.0
1	3	Curb And Gutter Atype A	675	LF	12.43	8388.23	62.0
1	4	Curb Only, Type B	675	LF	10.49	7079.06	38.0
1	5	Sidewalk	2500	SF	2.88	7190.50	0.0
1	6	Subcontracted Storm Drain	250	LF	25.00	6250.00	0.0
1	7	Catch Basin, Type 1	1	EA	3000.00	3000.00	0.0
1	8	Street Lights	7	EA	1900.00	13300.00	0.0
1	9	Aggregate Base	2500	TN	20.79	51978.25	0.0
1	10	Asphalt Concrete	2500	TN	5.32	13299.75	0.0

F2 = Spread By Quantity

Total 100.0

All regular items are shown, and next to each is a place to enter the percentage of this distributed item's cost the item is to receive. The percent must add up to 100%. You may leave the percent at 0% if you don't want to distribute cost to any items. Press <EXIT> when you have entered the percentages and are ready to continue.

If an item has been saved which begins with DST, it is considered a distributed item. A box will appear and the program will display the following screen:

Sch	Item Cd	Descriptions	Quant	UoM	Unit Price	Total Price	EXIT
1	1	Mobilization	1.00	LS	4,014.42	4,014.42	
1	2	Roadway Excavation	1,900.00	CY	13.40	25,460.00	
1	3	Curb And Gutter Atype A	675.00	LF	13.60	9,180.00	
1	4	Curb Only, Type B	675.00	LF	11.50	7,763.00	
1	5	Sidewalk	2,500.00	SF	3.15	7,875.00	
1	6	Subcontracted Storm Drain	250.00	LF	27.40	6,850.00	
1	7	Catch Basin, Type 1	1.00	EA	3,000.00	3,000.00	
1	8	Street Lights	7.00	EA	2,000.00	14,000.00	
1	9	Aggregate Base	2,500.00	TN	22.80	57,000.00	
1	10	Asphalt Concrete	2,500.00	TN	5.83	14,575.00	
ZZ	DST001	Curb Grade Items 3 & 4	1.00	LS	0.00	0.00	
ZZ	IND001	Miscellaneous Costs	1.00	LS	0.00	0.00	

Item	Actual	Cost per Unit	Total Cost	MU %	Markup	Price per Unit	Total Price	Cat.	INT
Actual	3,277.100	3,277.10	22.49	737.32	4,014.42	4,014.42			
Estimate	3,277.100	3,277.10	9.50	311.32	3,588.42	3,588.42			Closing Changes

Bid	Actual	Total Bid Cost	% Markup	\$ Markup	Total Bid Price	Balance
Actual	\$136,982.79	9.52	\$13,034.13	\$150,016.92		
Estimate	\$133,982.77	9.51	\$12,746.90	\$146,729.67		\$3,287.25

ZZ Phase

Item Number starting with DST or IND

An indirect item is similar to a distributed item. The only difference is that summary **cost** is posted to the Other cost type of the items that are receiving cost from the indirect item.

You enter an indirect item in the same manner also, but when you click <EXIT>, this screen appears.

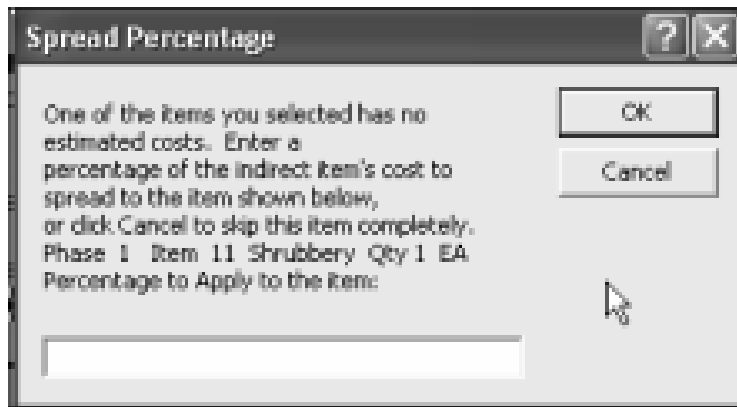
Spread?	Phase	Item	Description	Quantity	U/M	UnitCost	TotalCost
<input checked="" type="checkbox"/>	1	1	Mobilization	1	LS	3,277.10	3,277.10
<input checked="" type="checkbox"/>	1	2	Roadway Excavation	1900	CY	16.14	30,657.83
<input checked="" type="checkbox"/>	1	3	Curb And Gutter Atype A	675	LF	12.43	8,388.23
<input type="checkbox"/>	1	4	Curb Only, Type B	675	LF	10.49	7,079.06
<input type="checkbox"/>	1	5	Sidewalk	2500	SF	2.88	7,190.50
<input type="checkbox"/>	1	6	Subcontracted Storm Drain	250	LF	25.00	6,250.00
<input type="checkbox"/>	1	7	Catch Basin, Type 1	1	EA	3,000.00	3,000.00
<input type="checkbox"/>	1	8	Street Lights	7	EA	1,900.00	13,300.00
<input checked="" type="checkbox"/>	1	9	Aggregate Base	2500	TN	20.79	51,978.25
<input checked="" type="checkbox"/>	1	10	Asphalt Concrete	2500	TN	5.32	13,299.75

All regular items are shown. Clicking on an item or pressing the space bar will place a check mark next to the item. This will spread the indirect item's cost to that item. Check off all items to receive costs then press <ENTER> when you are ready to continue.

When the program spreads the indirect item's cost to the items, they receive a proportion of the indirect item's cost. For example, if an item makes up 5% of the total bid cost, then that item will receive 5% of the indirect item's cost. At least one item must be checked and <ESCAPE> is not allowed. Press space to check/uncheck the items and press <ENTER> to continue. After you press <ENTER>, the program will tell you how many items you are spreading to, then it will spread the cost to the items by placing the detail IDRCT into the appropriate cost categories (Labor, Equipment, Material, Sub/Service, and Other). If an item doesn't have any activities, the program will create an activity IDRCT and place the IDRCT details into the proper cost categories. You cannot change or delete IDRCT details, except by re-distributing the indirect item's cost again.

If you do not want to spread the indirect item's cost to any items, don't check off any items.

If you check off an item with no estimated costs, the following message will appear:



Including/Excluding Indirect Costs

When viewing the front page of the worksheet on an activity that includes indirect costs, the daily cost for the activity will be inflated by the amount of the indirect cost. You can exclude the cost of the indirect details in the labor and equipment sections by pressing Shift-F10. The daily and unit costs will turn red and a down arrow will appear next to their labels. This tells you that the daily cost is not including the indirect costs. If there are no indirect costs, the daily and unit costs will still be highlighted in red, but the cost will remain the same.

To include the indirect costs in the daily and unit costs, press the Shift-F10 key to toggle it back.

Alternate Items

Alternate items are used to compare two different ways of completing an item. For example, if you would like to compare the cost of your company building a storm drain and the cost of a sub building the storm drain, you would create an alternate item. First, create the regular item as if you were planning on doing the work. Then, create the alternative item as you would if you had a subcontractor.

Go to Item in the Main Menu, Add/Change Item, and select **Add Alternate Item**. An add item window will appear. The first three characters of the Item Code will be ALT. Enter the information as you previously did for items. Click on Save & Exit. You are then able to work with the alternate item as you would a normal item.

Sch	Item Cd	Descriptions	Quant	UoM	Unit Price	Total Price	EXIT
1	1	Mobilization	1.00	LS	4,014.42	4,014	
1	2	Roadway Excavation	1,900.00	CY	13.40	25,460	
1	3	Curb And Gutter Atype A	675.00	LF	13.60	9,180	
1	4	Curb Only, Type B	675.00	LF	11.50	7,763	
1	5	Sidewalk	2,500.00	SF	3.15	7,875	
1	6	18" RCP Storm Drain	250.00	LF	28.30	7,075	
1	ALT6	(Subcontracted Storm Drain)	250.00	LF	27.40	6,850	
1	7	Catch Basin, Type 1	1.00	EA	3,300.00	3,300	
1	8	Street Lights	7.00	EA	2,000.00	14,000	
1	9	Aggregate Base	2,500.00	TH	22.80	57,000	
1	10	Asphalt Concrete	2,500.00	TH	5.80	14,575	
ZZ	DST001	Curb Grade Items 3 & 4	1.00	LS	0.00	0	
ZZ	IND001	Miscellaneous Costs	1.00	LS	0.00	0	

Item	Cost per Unit	Total Cost	MU %	Markup	Price per Unit	Total Price
Actual	25.000	6,250.00	9.60	600.00	27.40	6,850.00
Estimate	25.000	6,250.00	9.52	595.00	27.38	6,845.00

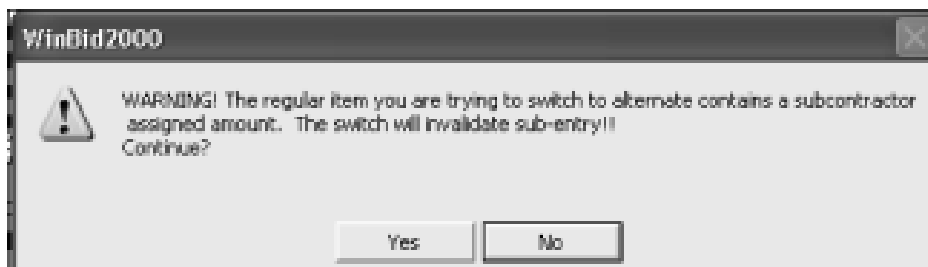
Bid	Total Bid Cost	% Markup	\$ Markup	Total Bid Price	Balance
Actual	\$137,196.29	9.51	\$13,045.63	\$150,241.92	
Estimate	\$134,196.27	9.51	\$12,765.90	\$146,962.17	\$3,279.75

Alternative Item

Click to switch alternative item to regular item in the bid

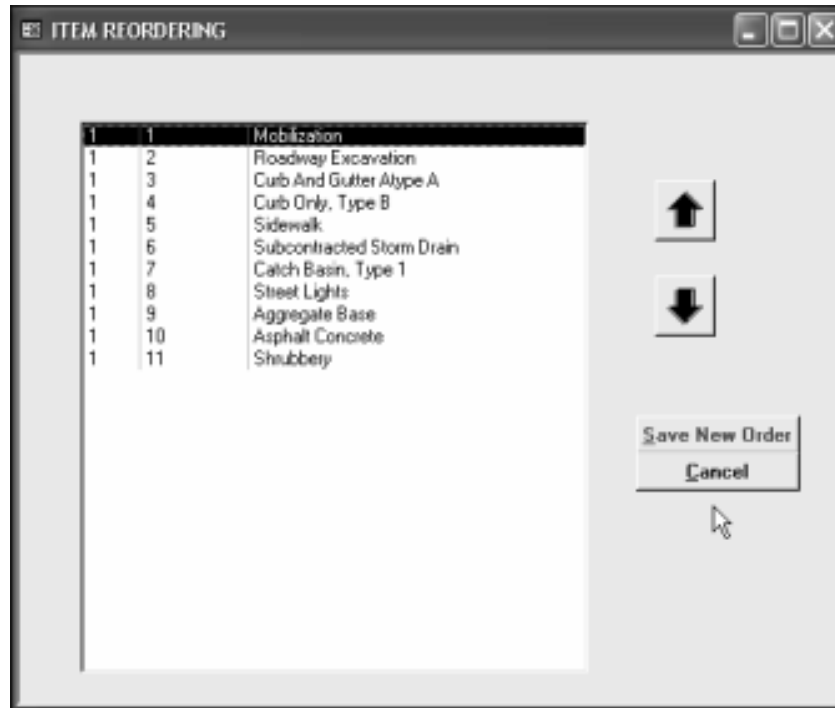
Item Switching

If you determine that the subcontractor can complete the work at a lower cost, you can switch the sub's cost into the bid. Click on the **Switch Alt to Reg** button and the sub's cost are now included. Click the button again to switch back. If you are taking a subcontractor's prices out and putting your work in, a warning that switching will take the sub's costs out of the bid. Click <Yes> to continue.



Reorder Items

If you would like to change the order of the items in your bid, go to the Item menu and highlight Reorder Items. You can then either choose to reorder by **User Controlled** or **Auto Resort**. If you choose Auto Resort, the program will sort items automatically in the order it feels is most logical. WHAT TYPE ORDER DOES IT AUTO RESORT TO. If you choose User Controlled, the following screen will appear.



To move an item, highlight the item and use the up and down arrows on the right to move it up and down as desired. When you are finished, click Save New Order. If you change your mind about the new order, click on Cancel to return to the previous order.

Import/Export Items

Winbid allows users to import data from files. From the Items menu, highlight **Import Items from File**. Another menu will appear giving you choices to Expedite Data (CSV), Expedite Addendum (CSV), or to get Excel Data (*.xls).

When you select one of these options, you will be asked to choose which file you wish to import.

To export data, highlight **Export Items to File** from the Items menu. You will see a menu with the options to Expedite Data (CSV) or use Excel Format.

Take-off Quantity

When scrolling through the items, you may see a red 'Take-Off' flash above the actual unit cost. The take-off flag notifies you that the item's unit price is based on a take-off quantity specified for the item.

Bid Name: C:\WinBid2000\SAMPLE: Tutorial

Sch	Item Cd	Descriptions	Quant	UoM	Unit Price	Total Price	EXIT
1	1	Mobilization	1.00	LS	1,945.92	1,946	
1	2	Roadway Excavation	1,900.00	CY	17.52	33,288	
1	3	Curb And Gutter Atype A	675.00	LF	10.95	7,391	
1	4	Curb Only, Type B	675.00	LF	9.86	6,656	
1	5	Sidewalk	2,500.00	SF	3.15	7,875	
1	6	Subcontracted Storm Drain	250.00	LF	27.38	6,845	
1	7	Catch Basin, Type 1	1.00	EA	0.00	0	
1	8	Street Lights	7.00	EA	2,080.50	14,564	
1	9	Aggregate Base	2,500.00	TN	22.34	55,850	
1	10	Asphalt Concrete	2,500.00	TN	5.71	14,275	
1	11	Shrubbery	1.00	EA	0.00	0	
22	DST001	Curb Grade Items 3 & 4	1.00	LS	0.00	0	
22	IND001	Miscellaneous Costs	1.00	LS	0.00	0	

Item	Actual	Cost per Unit	Total Cost	MU %	Markup	Price per Unit	Total Price	Cal
Actual	16.000	16.000	30,399.90	9.50	2,888.10	17.52	33,288.00	INT
Estimate	16.000	16.000	30,399.90	9.50	2,888.10	17.52	33,288.00	Closing Changes

Bid	Actual	Total Bid Cost	% Markup	\$ Markup	Total Bid Price	Balance
Actual	\$135,778.50	\$135,778.50	9.51	\$12,910.67	\$148,689.17	\$0.00
Estimate	\$135,778.44	\$135,778.44	9.51	\$12,910.73	\$148,689.17	\$0.00

On the Item screen there is an area for take-off quantity. Initially, the bid quantity will be the quantity used for the item. If you want to use a take-off quantity for the item, move the cursor to the take-off quantity field and enter a new number. To use the take-off quantity, click on the Use Takeoff Qty button.

Modify Item

SchNo	Item No	Item Description	Quantity	U/M	Category	Unit Cost Guess
1	1	Mobilization	1.000	LS	INT	\$2,377.20

AgencyNo: _____

[CANCEL] [SAVE & ADD ANOTHER ITEM] [SAVE & EXIT]

T/O Qty: 1 LS [Use TakeOff Qty] Conv Factor: NO conversion [Add Conv]

x 1.00 = Conv Qty _____ Conv UoM: LS

Sch	Item Cd	Descriptions	Quantity	UoM	Unit Price	Total Price	Category
1	1	Mobilization	1.0	LS	2,377.20	2,377.20	INT
1	2	Roadway Excavation	1,900.0	CY	77,307.96	146,887.92	INT
1	3	Curb And Gutter Atype A	675.0	LF	6,750.00	4,537.50	spcc
1	4	Curb Only, Type B	675.0	LF	6,875.00	4,608.75	spcc
1	5	Sidewalk	2,500.0	SF	7,190.50	17,976.25	spcc
1	6	Subcontracted Storm Drain	250.0	LF	6,250.00	1,562.50	SPIP
1	ALT6	18" RCP Storm Drain	250.0	LF	6,463.50	1,615.88	INT
1	7	Catch Basin, Type 1	1.0	EA	.00	.00	Sminst
1	8	Street Lights	7.0	EA	13,300.00	93,100.00	SELC
1	9	Aggregate Base	2,500.0	TN	51,000.25	127,500.63	INT

To maintain the bid totals properly, the program creates hidden details for the item's activities when you use take-off quantity. These details do not appear on the screen, however, they are printed out in the detailed report.

When you open an activity which uses the take-off quantity, a box will pop up which shows the adjustments that are being made to the activity, showing the take-off quantity next to the activity quantity.

Screenshot of a software interface showing a 'Schedule: 1 Item: 2 Roadway Excavation' window. The window displays a table of activities with columns for Detail, Description, Qty, Hrs, Days, \$ Rate, \$ Total, and Plus. A callout box labeled 'Take-Off Quantity' points to the 'TO Qty' field in the top right corner of the window, which is set to 1,900.0. The table lists activities like 'Operator, Foreman', 'Laborer', 'Medium Backhoe Operator G-8', 'Teamster, 5 axle', 'Pickup Truck', and '5 Axle End Dump'.

One thing to remember is that take-off quantity applies to all the activities for the item.

Note
 If you have saved an activity using the take-off quantity, the program will not let you switch back to the bid quantity until you have deleted all the activities for the item. One short-cut around this is to set the take-off quantity to the same value as the item quantity. This will clear the take-off quantity adjustments.

Intelligent Calculator

Short-Cut Keys

Several short-cut procedures have been developed to allow you to quickly manipulate or print any of the items. Pressing <Ctrl-C> sets an item's status to closed. Pressing <Ctrl-L> is the short-cut to enter Material costs. Use <Ctrl-O> to set an item's status to open. The short-cut key for entering Sub Costs is <Ctrl-S>. Pressing <Ctrl-Shift-B> shows the bond costs.



Chapter 7 - Building an Estimate

Working with An Item's Activities

For every item in the bid, you can work up activities that determine what the estimated cost of the item will be. To access the activities for an item, double-click on the item from the main bid screen. If there are no activities for the item, the program will place you at a blank worksheet screen. The screen shown is already filled in to give you a better idea of what an activity looks like.

Activity Description	Quantity	U/M	Cost/Unit	Activity Cost
U Job Trailer	1.0	LS	99,142.960	99,143
Place Base Large Crew	1.0	LS	24,778.490	24,778
Backfill Curb & Gutter	1.0	LS	1,245.820	1,246
Excavation W\Excavator	1.0	LS	25,316.140	25,316

Any activities for the item are listed in the middle of the screen. You can select the activity to change by highlighting it and pressing **SELECT**, or double clicking on it. This will put you on the worksheet where you can add or delete details, and make any other changes necessary.

Deleting An Activity

To delete an entire activity, highlight the activity you want to delete and then click **Delete Activity**. Once you delete an activity there is no way to recover it, so be sure that this is what you want to do.

Adding An Activity

To add another activity, press **Add Activity** to start a new worksheet. If you change an existing activity code it will also create a new activity code and leave any other activities unchanged.

If there are distributed or indirect costs associated with an item and you press <ENTER>, a scroll box appears in the middle of the display listing all of the activities for the item. There will be a **D** next to the activity description of a distributed activity. Indirect costs will have an **I**. Subcontracted activities will show an **S**.

Loading An Activity

Select Add Activity. Use the pull-down menu in the Act Code to choose an already created activity. After entering an activity code and pressing <ENTER>, the description of the activity will be filled in, and if there is a default crew code for this activity, the crew will be loaded.

If there is no activity in the database for the code entered, the computer will ask if the code should be added to the database. If you say yes, the activity will be added to the database when you save the worksheet. If you say no, the activity code can be used, it just won't be added to the master database.

You can add details to those that appear automatically. You can also change the details that appear.

Act Code: 5000 Description: Sidewalk Grade Act Qty: 2,500.00 SF
 Crew Code: None Crew Desc: ActQtyDesc: Acctg Code: None
 Labor/Equipment Material/Other Transportation/Sub ALL

Detail	Description	Qty	Hrs	Days	\$ Rate	\$ Total	Plug
OF	Operator, Foreman	1.00	8.00	1.0	31.00	248	<input type="checkbox"/>
OSL	Operator, Skiploader	1.00	8.00	1.0	29.51	236	<input type="checkbox"/>
OGC	Grade Checker Operator G-8	1.00	8.00	1.0	41.00	328	<input type="checkbox"/>
TW	Teamster, Water Truck Driver	1.00	8.00	1.0	32.30	258	<input type="checkbox"/>
*		0.00	0.00	0.0	0.00	0	<input type="checkbox"/>

HOURLS DAYS
 Labor: 8 1
 Equip: 8 1
 Both: 6 1

Rate/Day: 2,500.00
 Rate/Hr: 312.50

Overtime: (>8 hrs @ 1.5) \$0.00 Total Labor Cost: \$1,070.40

Detail	Description	Qty	Hrs	Days	\$ Rate	\$ Total	Plug	RntRt
TPU	Pickup Truck	1.00	8.00	1.0	10.0	80	<input type="checkbox"/>	<input type="checkbox"/>
LSL	Loader, Skiploader	1.00	8.00	1.0	40.0	320	<input type="checkbox"/>	<input type="checkbox"/>
RDDV	Roller Double Drum Vibrator	1.00	8.00	1.0	45.0	360	<input type="checkbox"/>	<input type="checkbox"/>
TW20	Water Truck 2000 Gallon	1.00	8.00	1.0	45.0	360	<input type="checkbox"/>	<input type="checkbox"/>
*		0.00	0.00	0.0	0.0	0	<input type="checkbox"/>	<input type="checkbox"/>

Labor Daily: \$1,070.40
 Labor/ActUnit: \$0.43
 Equip Daily: \$1,120.00
 Equip/Act Unit: \$0.45

Save Crew to Master Show All Crew Type: Regular Total Equipment Cost: \$1,120.00

Click on the tabs to see Materials and Other, Transportation and Sub, or All details.

Activity Quantity

In the Activity Quantity fields specify a quantity, a description of the quantity, and a unit of measure for the activity. The activity quantity allows you to have a quantity for the activity that is different from the item quantity. When viewing the list of activities for an item, you will be able to see what the unit cost for this activity is, based on the activity quantity. The activity quantity defaults to the item quantity.

In the Qty column of the detail, use the <INSERT> key to insert the activity quantity. This feature is only enabled on the Material, Transportation, Sub/Service and Other cost types, however.

Once you have all the details put into the activity for this item, click on Exit to save the activity. If the item is open, the estimated cost for the item will be transferred from the gray line to the blue line, giving the item the same actual and estimated costs.

Re-Ordering Activities

If you would like to change the order of activities, right-click on the item. In the menu that appears, select ReOrder Activities. Use the black arrows to move the highlighted item up or down in the order.

Working with Details

Viewing Details

To view the details used in an activity, double click or click on SELECT to choose the highlighted activity. The first screen will show the Labor and Equipment details. Click on the tabs to show Material/Other, Transportation/Sub, or All details. If you would like to see only one type on the page, click on the type label on the left. To return to both categories, click on the label again.

Click to see only Labor details

Click to show All, Owned, Rented or Equipment

Above the Equipment details are three boxes with an A, an O and an R in them. If you click on A, all equipment will be available for use in the activity. Click on O and only owned equipment will be shown. R is for only rented equipment.

Deleting a Detail

To delete a detail, click on the detail to highlight the line to be deleted and press the <DELETE> key. Click on yes if you are sure you want to remove the detail.

Plug Details

To designate a detail as a plug detail, meaning the cost of the detail is just a plug number, click in the box in the Plug column. A check mark will appear in the. By clicking on the same box again, the check mark will disappear and remove the plug attribute from the detail.

Once a valid cost for the plug detail has been entered, you will want to click the box to remove the check mark and make the detail normal again.

Minorities

To designate a detail as a subcontracted minority detail, create the detail as you would normally create a sub detail. Subcontractors are discussed in Chapter 8.

Hours, Days and Rates

The Default Hours/Day sets the number of hours in a typical workday, and defaults initially to 8 hours/day. The Rate/Day and Rate/Hour fields are based on the number of actual days.

The Days/Labor, Days/Equipment, and Days/Actual list the number of days for labor and equipment that this activity will take. The actual days overrides those fields and changing Days/Actual will cause Days/Labor and Days/Equipment to be changed to the same value. If the Days/Actual are not a whole or half day, the program will beep and tell you and let you go back and change them if you want.

Changing any of the days or the rates will cause the other days and rates to be adjusted. If you increase the number of actual days, the rates go down, and increasing the rates makes the actual days go down.

Overtime

The program allows the user to specify at what hour overtime begins, and at what rate it should be calculated. From the worksheet screen, press F6 and a box will pop up letting you enter the overtime rate and the hour to begin applying overtime. If you specify overtime to be applied at 0 hours, it will apply to the entire day. The default overtime rate is 1.5 times normal pay for anything over eight hours. If you enter in a longer day without changing overtime, overtime pay will automatically be calculated.

Combining/Separating Labor and Equipment Costs

The front page of the worksheet has, by default, Labor and Equipment daily and unit costs as separate fields. If you want to estimate with labor and equipment as a single daily cost, you can press F10 to combine the two values. The detail print outs will also print a combined daily cost for the labor and equipment.

Working in A Bid

When working in a bid, you can right-click on an item to see a menu with most of the common activities. In the first section of the menu, you can modify or delete the highlighted item. If you select Modify, you will see the screen used to create the item originally. If you select delete, you will be asked if you are sure you wish to delete the item and all of its components. Click Yes if you are sure.

The second, third, and seventh sections deal with adding different types of items and reordering items. Adding items through this menu is the same as adding them from the Item menu. When reordering child items, the window works in the same manner as reordering regular items. If you select reorder child items when only one child item exists, you will be told you can not reorder an only child.

The fourth section allows you to work with activities within the item. These actions are the same as explained earlier in this chapter.

In the fifth section you can choose to un-distribute an item if you have highlighted a distributed item already distributed. If you select this option on a regular item, you will be asked to choose a distributed item.

The sixth section involves renumbering items. If you choose Increment the highlighted item and all items following it will be increased by one. If you choose Decrement, the highlighted item and all the following items will be decreased by one. This works only with Regular Items.

The screenshot shows a software window titled "Bid Name: C:\WinBid2000\SAMPLE: Tutorial". It contains a table of bid items and a context menu for item 5.

Sch	Item Cd	Descriptions	Quant	UoM	Unit Price	Total Price	EXIT
1	1	Mobilization	1.00	LS	1,945.92	1,946	
1	2	Roadway Excavation	1,900.00	CY	44.55	84,645	
1	3	Curb And Gutter Atype A	675.00	LF	10.95	7,391	
1	4	Curb Only, Type B	675.00	LF	9.86	6,656	
1	5	Sidewalk	2,500.00	SF	3.15	7,875	
1	6	Subcontracte	250.00	LF	27.38	6,845	
1	7	Catch Basin,	1.00	EA	0.00	0	
1	8	Street Light	7.00	EA	2,080.50	14,564	
1	9	Aggregate Ba	2,500.00	TH	22.34	55,850	
1	10	Asphalt Conc	2,500.00	TH	5.71	14,275	
1	11	Shrubbery	1.00	EA	0.00	0	
ZZ	DST001	Curb Grade I	1.00	LS	0.00	0	
ZZ	IND001	Miscellaneous	1.00	LS	0.00	0	

The context menu for item 5 includes the following options:

- Modify
- Delete
- Add Regular Item
- Add Child Item
- Add Alternate Item
- Default Items
- ReOrder Activities
- Add Activity
- Delete Activity
- Un-distribute Item
- Increment
- Decrement
- Create Sub Child Items
- Reorder Child Items

At the bottom of the window, there are summary fields:

Item	Actual	Co	MU %	Markup	Price per Unit	Total Price
Item			9.52	684.60	3.15	7,875.00
Estimate			9.52	684.60	3.15	7,875.00

Summary Totals:

Actual	\$ Markup	Total Bid Price	Balance:
50	\$17,359.61	\$200,046.17	\$0.00
Estimate	50	\$17,359.61	\$200,046.17

Custom Worksheets

An alternate method for creating activities for an item is to use a custom worksheet. They are called custom worksheets because each worksheet identifies and deals with a specific need of the estimator. For example, the Paving worksheet is tuned to work with paving items, and includes a square feet to tons calculator to facilitate estimating a paving item. To access the custom worksheets, from the bid screen press Shift-F4 and a list of the custom worksheets will be displayed. Press <ENTER> or double click on the custom worksheet you want to use. For purposes of this example, we will use the standard custom worksheet, the paving work-

Note:

The paving worksheet provided with the program is an example of a custom worksheet. These worksheets are easily modified by Preston Construction Services to meet your specific needs.

The three sections at the top of the screen are for square feet to tons conversion. Enter the square feet (it defaults to the item's quantity), the inches or feet of asphalt concrete and rock, and the program calculates the number of tons required. The bottom of the screen is where you enter information about the activities you will create for this item.

If you enter a value for the square feet of asphalt, the square feet will automatically be applied to the rock as well. However, changing the square feet for rock will not change the square feet for asphalt.

When you place the cursor on an activity code field, you can press F7 to list the activities available or type in an activity code directly.

If the activity code does not contain a default crew, then the program will not let you enter it. Once you have entered a valid activity code with a default crew attached to it, you can move to the add-ons field and press <ENTER>.

The add-ons is where any additional details you want to include with the activity are entered. Any details in the Material, Transportation, Sub/Service, and Other categories in the default crew will automatically be loaded into the add-on screen when you specify the activity code. The add-on screen looks like this:

To define additional details for an activity, move to the Add-On field and press <ENTER>. You must specify the type of detail: Labor, Equipment, Material, Transportation, Sub/Service, or Other. Press F7 on the Code field for a list of all valid details for the type specified.

If you want to place the activity's quantity into the detail's quantity field automatically, press the <INSERT> key, or put a quantity in manually. Once the quantity, units of measure, and unit cost fields are filled in, the add-on detail is complete.

Once you have finished with the add-ons, press <ESCAPE> to return to the worksheet.

When you are done with the worksheet, press <ESCAPE> and the program will ask if you want to build the activities for the item. If you answer yes, the activities and add-ons you set up will be created for the item.

Note

The density values and activity codes entered will be brought up as the defaults the next time you use the worksheet.



Chapter 8 - Summary

Marking up the Bid

To change the percent a bid is marked up, select Summary on the main menu and click on **Markup the Bid**. The following screen should appear:

	% Markup	TotalCost	% Cost	\$ Markup	TotalPrice
Labor	<input type="text" value="9.50"/>	\$69,418.29	37.87	\$6,594.74	\$76,013.03
Equipment	<input type="text" value="9.50"/>	\$26,429.50	14.42	\$2,510.80	\$28,940.30
EquipRent	<input type="text" value="9.50"/>	\$1,114.67	0.61	\$105.89	\$1,220.56
Material	<input type="text" value="9.50"/>	\$37,822.00	20.64	\$3,593.09	\$41,415.09
Transportation	<input type="text" value="9.50"/>	\$0.00	0.00	\$0.00	\$0.00
Sub/Service	<input type="text" value="9.50"/>	\$46,125.00	25.17	\$4,381.88	\$50,506.88
Other	<input type="text" value="9.50"/>	\$0.00	0.00	\$0.00	\$0.00
Bond	<input type="text" value="9.50"/>	\$2,377.20	1.30	\$225.83	\$2,603.03
TOTAL:		\$183,286.66		\$17,412.23	\$200,698.89

Composite:

Markup Type to Use:
 Composite Components

% Bidng (amt betwn 0.00 and 2.00):

Use Rounding

The current percentages for the different cost types are shown along with the dollars the total amount each category contributes to the total bid cost and the dollar amount that each category is marked up.

The composite percent is the average of all the categories' percentages. It is weighted, meaning that if all the money is in sub/service, changing the percent to mark up sub/service will affect the composite much more than changing the percent to mark up Other, for example.

Next to the composite markup, there is a box where you can specify the markup type to use: composite or component. The program defaults to composite as noted by the filled in circle. To change to component, click on the circle next to it. You will note that composite is then an empty circle. Component markup means items will be marked up based on the individual percentages for the different categories. An item with only labor costs, for example, will be marked up the labor percentage and its markup will not be affected by the percents for the other categories.

Rounding Bid Prices

Selecting Round Bid Prices from the Summary menu and the program will round the item prices a fraction of the percent that you specify. For example, if you enter a rounding percentage of .5%, the program will round the item prices as much as it can without changing the original item's price more than 1/2 of 1 percent.

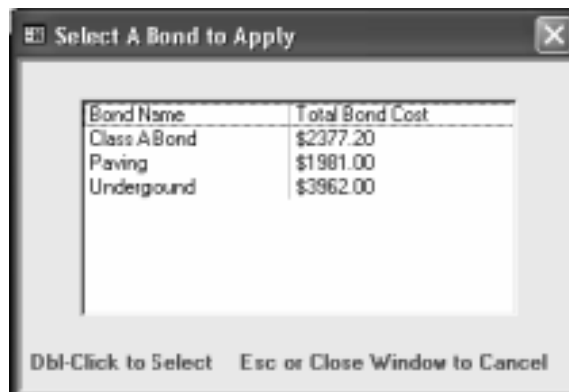
Note

After rounding prices, the change in the overall bid can be noted on the Balance field on the main bid screen. The default balance calculation will show the difference between the sum of the actual prices (the blue line) and the non-zero sums of the estimated prices (the gray line).

Selecting Re-Apply Markup from the Summary menu will re-calculate all the prices using the existing mark up percentages, and will not round any of the item prices.

Spreading the Bond Cost

To include a Bond cost in the bid, first make sure you have configured the bond percentages under **Setup Bonds**. Bonds are treated as indirect costs. Selecting Spread Bond Cost to the Bid from the Summary menu will display a list of the configureds:



Bond Name	Total Bond Cost
Class A Bond	\$2377.20
Paving	\$1981.00
Underground	\$3962.00

Dbl-Click to Select Esc or Close Window to Cancel

Highlight the bond you want to select and double-click. The program will show you a list of the items in the bid and you can check off which items are to receive the bond cost. You can check the items by clicking in the box.

BOND SPREAD

APPLY Cancel EXIT

Bond Spread Selection

Spread?	Phase	Item	Description	Quantity	U/M	UnitCost	TotalCost
<input checked="" type="checkbox"/>	1	1	Mobilization	1	LS	2377.2	2377.2
<input type="checkbox"/>	1	2	Roadway Excavation	1900	CY	40.6884	77307.96
<input type="checkbox"/>	1	3	Curb And Gutter Atype A	675	LF	10	6750
<input type="checkbox"/>	1	4	Curb Only, Type B	675	LF	9	6075
<input type="checkbox"/>	1	5	Sidewalk	2500	SF	2.8762	7190.5
<input checked="" type="checkbox"/>	1	6	Subcontracted Storm Drain	250	LF	25	6250
<input checked="" type="checkbox"/>	1	7	Catch Basin, Type 1	1	EA	0	0
<input type="checkbox"/>	1	8	Street Lights	7	EA	1900	13300
<input type="checkbox"/>	1	9	Aggregate Base	2500	TN	20.4001	51000.25
<input type="checkbox"/>	1	10	Asphalt Concrete	2500	TN	5.2143	13035.75
<input checked="" type="checkbox"/>	1	11	Shrubbery	1	EA	0	0

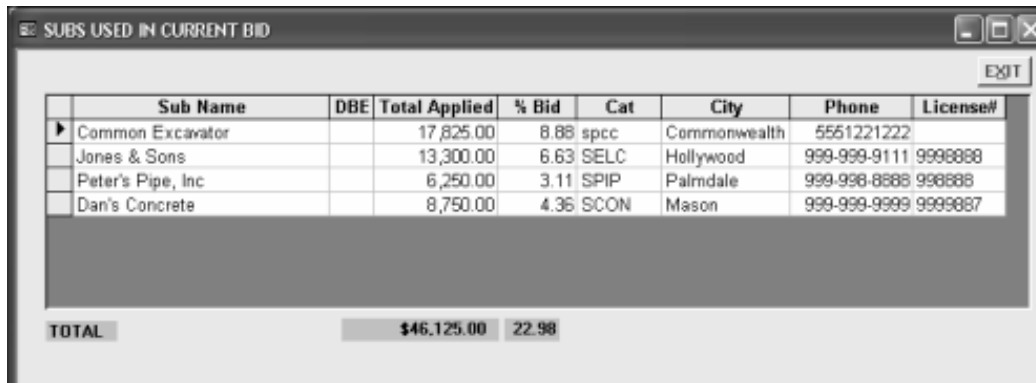
This screen is very similar to spreading the cost of an indirect item to the bid. It is the same idea: distributing the overhead cost of the bond to the bid items.

Clearing Bond Costs

If you have decided that you no longer need to spread the bond or would like to change the bond that is spread, you must clear the existing bond. Select **Clear Bond Cost** from the Summary menu. The bond cost will automatically be taken off. If you would like to spread another bid, following the instructions of the previous section.

Viewing the Subs Used in the Bid

Viewing the Subs in a Bid will bring up a list of all the subs being used in the job, what their costs are, and what percentage the subs contribute to the total bid cost.



The screenshot shows a window titled "SUBS USED IN CURRENT BID" with an "EXIT" button in the top right corner. The window contains a table with the following data:

Sub Name	DBE	Total Applied	% Bid	Cat	City	Phone	License#
Common Excavator		17,825.00	8.88	spcc	Commonwealth	5551221222	
Jones & Sons		13,300.00	6.63	SELC	Hollywood	999-999-9111	9998888
Peter's Pipe, Inc		6,250.00	3.11	SPIP	Palmdale	999-998-8888	9988888
Dan's Concrete		8,750.00	4.36	SCON	Mason	999-999-9999	9999887

At the bottom of the window, a summary row shows:

TOTAL		\$46,125.00	22.98				
--------------	--	--------------------	--------------	--	--	--	--

Note

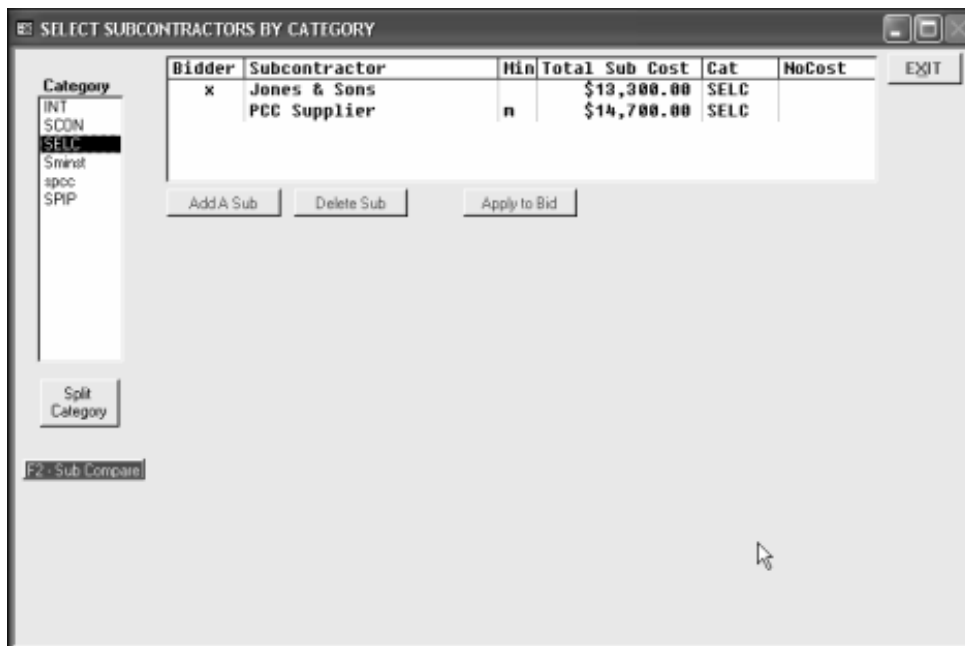
The cost of the subs being used in the bid as viewed on the screen **does not** take into account any bid phases that have been turned on or off. This was a result of a compromise between speed and accuracy. The print out, Subs Used in Bid, will present accurate totals and percentages if you have any phases excluded from the bid totals. The screen information is completely correct if all phases are included in the bid, which is usually the case.



Chapter 9 - Subs

PCS Estimating allows for different subcontractor costs to be tracked in a job, and allows easy access to changing subcontractor costs and comparing subcontractor quotes.

Select Items from the Main Menu and click on **Enter Sub Costs** or press <Ctrl-S>. This window will appear.



On the left is a list of the categories. When a category is highlighted, a list of subcontractors that have given you prices for the work in that category will appear. If you have not entered any prices from subs, it will say <No Subcontractors Selected>.

An X located in the Bidder column means that subcontractor is being used in the bid. The subs are listed in order from lowest price to highest. An M will appear in the Min column if that subcontractor is a Minority Business Enterprise, or MBE. A W will appear if the sub is a Woman Owned Business Enterprise.

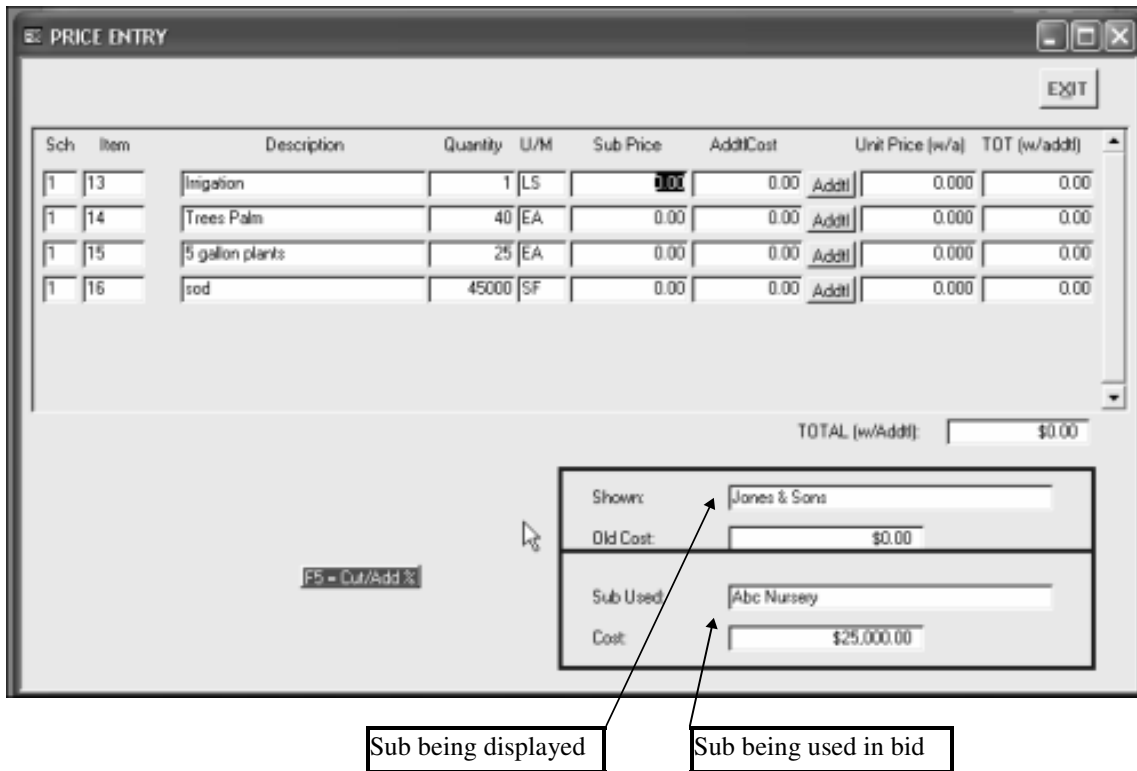
Adding a Subcontractor

You can add a subcontractor by clicking on the **Add a Sub** button. A window will appear with the names of subcontractors listed under the current category. If you would like to add a sub from a different category click on Select from all Subs. To select a sub, double click on the name of the subcontractor you would like.

When you have selected a sub, a Price Entry window will appear with the items and descriptions from that category already listed. Enter the subs prices. The total cost for each item and the total for the subcontractor will be calculated automatically.

When entering a subcontractor's prices, the current sub being used in the bid is shown at the bottom of the screen along with their cost. The sub you are working on is shown above that, along with the current subcontractor's price before any changes were made.

This is the price entry window.



Deleting a Subcontractor

To delete a sub, click on the **Delete Sub** button on the Select Contractors window. Select Yes when asked if you would like to delete the specified Sub. Before you are able to delete a sub that is currently being used in the bid you must first choose another sub and apply it to the bid.

Making Changes to Subcontractors

Double click on a subcontractor and the Price Entry window will appear. Click on Exit to save changes.

Press **F5** or click on the **F5 = Cut/Add %** button to add or cut a percentage of the cost. Type in the percentage desired and hit enter. The dollar amount changed will appear. Click on Apply to save the changes.

Comparing Subs

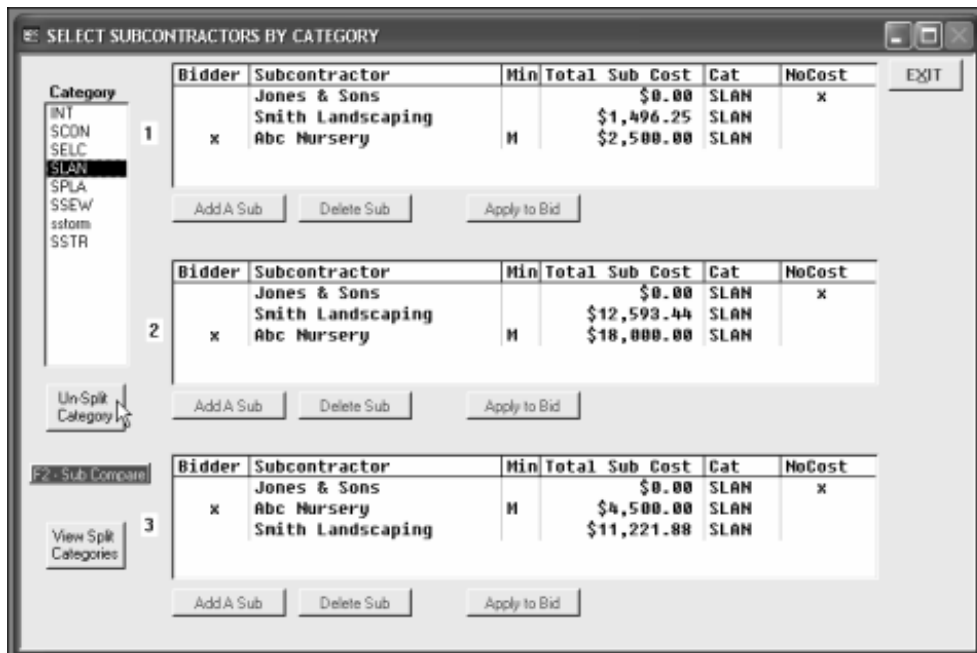
To compare the costs for all subs listed for each item, press **F2** or click on the **F2-Sub Compare** button. A window will appear with the items and descriptions along with costs for each subcontractor listed. The chosen subcontractor will be at the top of the window. Cost information can not be changed in this window.

Splitting Categories

To split the items so that different subcontractors can be used to complete different parts of the phase, click on the **Split Category** button. A warning will appear to notify that you may not add items to the category after they have been split. Click Yes to continue.

A window will appear with the items from that category listed. On the right will be several categories listed. Click on the box to select the category you would like that item to be placed. Click Exit to save changes.

Your Select Subcontractors window will now look like this.



Additional Work for Subs

Using PCS Win Bid, a sub can complete part of an item while you complete another. Both costs go into the item.

For example, you would like part of an item to be done by a landscaping subcontractor while you complete the rest of the work. Enter in the sub's work as usual.

Sch	Item	Description	Quantity	U/M	Sub Price	AddtlCost	Unit Price (w/a)	TOT (w/addtl)
1	13	Irrigation	1	LS	0.00	0.00	0.000	0.00
1	14	Trees Palm	40	EA	0.00	0.00	0.000	0.00
1	15	5 gallon plants	25	EA	0.00	0.00	0.000	0.00
1	16	rod	45000	SF	0.00	0.00	0.000	0.00

TOTAL (w/Addtl): \$0.00

Shows: Jones & Sons
Old Cost: \$0.00
Sub Used: Abe Nursery
Cost: \$25,000.00

FS = Cu/Add %

The Addtl button

Click on the **Addtl** button between the AddtlCost and Unit Price columns. An activity window will appear where you can enter the activities you would like to complete in the item. Click Exit to save your information. The additional cost will appear and will be added to the sub's cost to calculate the total cost of the item.

Schedule: 1 Item: 13 Irrigation Quantity: 1 LS

Act Code: Description: Act Qty: 1.00 LS

Crew Code: None Crew Desc: ActQtyDesc: Acctg Code: None

Labor/Equipment | Material / Other | Transportation/Sub | ALL

Detail	Description	Qty	Hrs	Days	\$ Rate	\$ Total	Plus	Plug
		0.00	0.00	0.0	0.0	0.0		

HOURS DAYS
Labor: 8 1
Equip: 8 1
Both: 8 1

Rate/Day: 1.00
Rate/Hr: 0.13

Overtime: (>8 hrs @ 1.5) \$0.00 Total Labor Cost: \$0.00

Save Crew to Master Show All Crew Type: Regular Total Equipment Cost: \$0.00

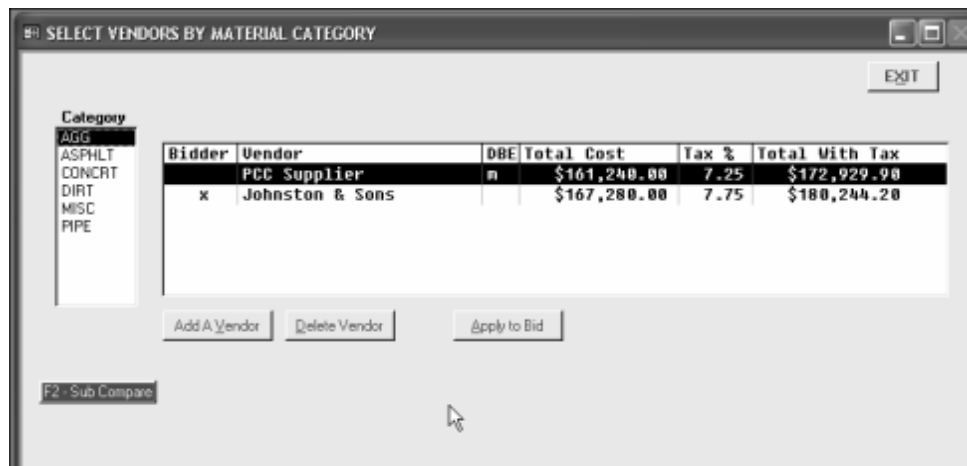


Chapter 10 - Vendors

Vendors are very similar to subcontractors, with a few key differences. Subcontractors will create the sub details, even activities, to spread their cost into the bid. Material entry will only modify the cost of material details already in the bid. Also, the user cannot change a detail that has been created by sub entry. The material details in the bid, since they were created by the user, can be changed by the user. This means that what material entry thinks the cost and quantity of a material is might not be true, since the user is free to change those amounts.

As soon, as you go into material entry, it will update its information on the material details in the bid, but this still doesn't guarantee that print-outs will be 100% accurate if you have changed the quantity or cost of a material detail. Your best bet is to always enter material costs through material entry.

Select **Vendors** from the menu, **Enter Material Costs** from Items in the Main Menu, or press **<Ctrl-L>**.



On the left is the list of categories. To add a new category to the list, see Setup Categories in Chapter 3. The vendors with materials for items in that category are listed to the right including tax amounts. An M in the DBE column if the vendor is a Minority Business Enterprise. Click on the **Apply to Bid** button and an X will appear in the Bidder column to show that the vendor is being used in the bid.

Add/Delete Vendor

Click on **Delete Vendor** to delete the vendor from the list. Select Yes when asked.

Click on **Add a Vendor**. A list of vendors for that category will appear. Click on **Select from All Vendors** to see a complete list of vendors. Double-click or push <Enter> to choose a vendor. A Price Entry window will appear.

The Price Entry window is similar to the Price Entry window used with Subcontractors.

The screenshot shows a window titled "PRICE ENTRY". At the top left is a "Quote Number" field. To the right is a button labeled "F5 - Cut/Add %" and an "EXIT" button. Below this is a table with the following data:

Code	Description	Quantity	U/M	Unit Cost	Cost
ABC2	Aggregate Base Class 2	20,000.00	TN	0.00	0.00
ABCM	Crush Misc. Base	1,040.00	TN	0.00	0.00

Below the table, there is a checkbox for "Tax Included in Prices" (unchecked) and a radio button for "OR Tax Rate % (0 to 100)" (checked). The tax rate is set to 7.25. The "TOTAL:" field shows \$0.00. On the left, there is a "Quote Conditions" text area. On the right, there are two stacked boxes for vendor information: "Shown: PCC Supplier" with "Old Cost: \$0.00", and "Vendor Used: Johnston & Sons" with "Cost: \$167,280.00".

The first column contains the detail code. When a vendor is entered into the database, the categories of materials that the vendor supplies are entered. When entering prices, you will only be able to use the vendor in those categories. If you need to change the categories of material that a vendor supplies, follow the directions in Chapter 3 on Setting Up Subcontractors/Vendors/Customers.

This rest of the material entry works the same as in subcontractor entry. You can change information and enter in unit costs. The Vendor being used in the bid is again shown at the bottom for comparison.

Pressing F5 or clicking on the F5-Cut/Add% button will allow you to modify prices by either a percentage or a dollar amount.

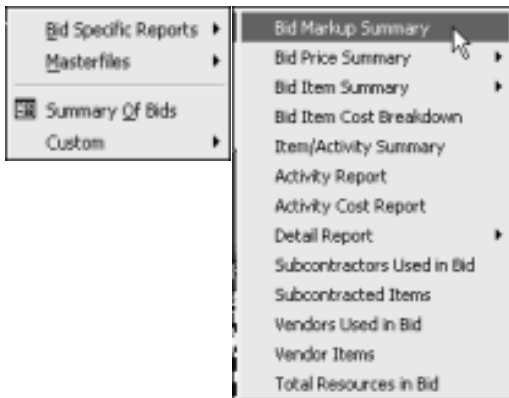
Tax on Material

To include tax into the prices, click on the box in the middle left of the window. You can also enter in a tax rate between 0 and 100% in the center of the window.



Chapter 11 - Printing and Faxing

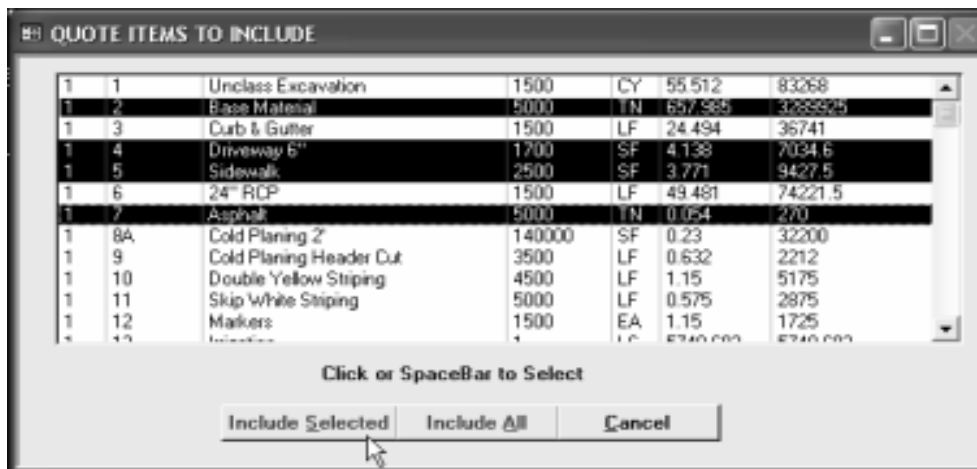
The print function is divided into three main sections. The first section is Bid Specific Reports.



In Bid Price Summary, you can choose to print open items or closed items.

In Bid Item Summary, you can print the items with item numbers or agency numbers

Detail Report can be very complex if you print a detail report for every item in the bid. For this reason, you can choose to select Item Details or just Items No Cost. If you select Item Details the following window appears.



Highlight the items you would like in the report and click on Print Selected. If you would like to print details for all items, click Print All.

The rest of the reports are all straightforward: click on the summary or report you would like to print. You will be given the option to preview or to print.

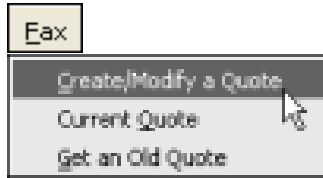
The second section is the Masterfiles.



When you select the file you would like to print, you will be asked to preview or print.

Printer Setup

Faxing



Above is the Fax menu. You can use this menu to work with quotes and then either fax the quote (if you have faxing capabilities on your computer) or print the quote to be faxed at a later time.

Creating a Quote

The fax menu allows you to create a new quote to fax, send the current fax, or to look up a previous quote. If you select **Create/Modify a Quote** from the menu for the first time, the following screen will appear.



The name of the bid you are working with and the bid date is at the top. Use the pull-down menu in the top center to choose the customer you would like to send the fax to. Below this are the costs and prices for both the bid and for the customer.

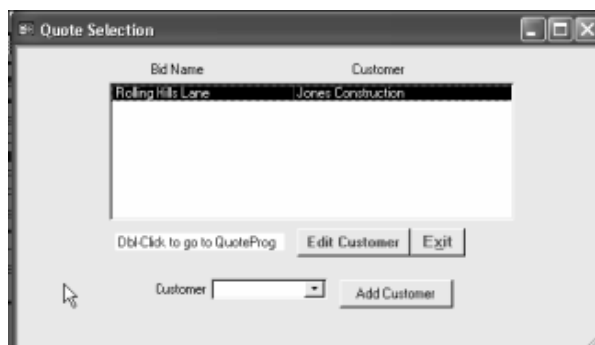
In this screen, no items have been selected for the customer yet, so the customer's cost and price are equal to zero. Click on Select Items in the top right corner to choose items for that customer.



A list of all items in the bid will appear. Click on the items once to select them; they will remain highlighted. Click on the item again to unselect it. Click on Include Selected to include only those items for the customer, or click on Include All to choose all items for the customer. Click on Cancel to return to the Quote Editing window. The price of the selected items now appears in the cost and price of the Customer. Click on Exit to return to the bid. Click on Go To Quote Program to send the fax. This will be discussed later in this chapter.

Modifying a Quote

If you have already selected **Create/Modify Quote** the following screen will appear when you select it again.



The lists of already created quotes appears in this window. Double-clicking on the name of a bid will send the quote to the quote program. If you would like to edit the quote first, click on **Edit Customer**. This will send to the Quote Editing screen you saw when you created a quote. If you would like to add a quote, select a customer from the pull-down menu and click Add Customer. If the customer you want is not in the pull-down menu, you must first enter the customer into the system. To do this see Setting Up Subcontractors, Vendors, and Customers in Chapter 3.

The Quote Program

When you click on Go To Quote Program from the editing window or double-click on a bid name from the quote selection window the following screen will appear.

Quote No.	Cust. No.	Customer	Cust. Rep.	
46	JDN203	Jones Construction	Jack Jones	\$44,457
49	PCS001	Preston Constru. Serv	Robert Preston	\$3,306,657

At the top of the screen is the date and the information of your company. In the top left corner is a CI button. If you click on this button you will be able to edit your company information. For example, this company is 123 Construction. If I change the company name to ABC Construction, the next time I work with the quote program the top of the window will say ABC Construction.

In the middle, you can filter the quotes by either estimator or customer. Use the pull-down menu to choose a person to filter by. Click on the Est or Cust button to unfilter. To select a specific bid, use the pull-down menu to choose a bid with quotes. If you know the quote number, enter it in the box to the right of Find Quote and then click on Find Quote. If the quote can be found you will see a screen that will allow you to see, print, or fax the conditions of the quote. This screen will be discussed in the Final Quote Screen section of this chapter.

The next section of the screen shows the details of the bid. If you click on Phase, you will see a list of the phase numbers and the descriptions of the phases.

At the bottom of the screen is the list of quotes for this bid and the information about the quotes. Click on the quote number will take you to the Final Quote screen you saw if you used find bid.

The second part of this screen is discussed on the following page.

Customers

Find Customer: [Dropdown] Add New Exit

Customer No: JON203
 Group: SCAL
 Company Name: Jones Construction
 Person Name: Jack Jones
 Addr1: 4654 4th Street
 Addr2: [Empty]
 City: Anaheim
 State: CA
 Zip Code: 924645
 Phone: 654654654
 Fax: 6546546546
 CustRank: 1

If you click on the **Customer** button, a screen will appear allowing you to edit customer information. It is important to double-check the accuracy of the fax number if you are planning on faxing this quote to a customer. The pull-down menu allows you to change to a different customer's information. If you wish to add a new customer. Click on the Add New button. Click on Exit when you are finished.

Enter Standard Conditions

Standard Conditions General Conditions Exit

SeqNo	Job Condition
1	Engineering, test, permits, or inspection fees by others.
2	This is the 2 Condition
3	This is the 3rd Condition
4	This is the 4th Condition
*	0

Record: 1 of 4

If you click on the **Conditions** button above, you will see the following screen. This is a list of the job conditions for each sequence. Use the arrows at the bottom to move between conditions. If you wish to write overall conditions, click on the General Conditions button. A window will appear with a blank box where you can write any notes of the general conditions. There will also be an area for Conditional Conditions. Click on Exit to continue.

Copy Quote Copy Exit

Bid Name: PRE001
 Rolling Hills Lane
 Customer: JON203
 Jones Construction
 Quoted: 46
 Bid Date: 9/29/2000

Frequency
 Frequent Some
 Occasional 1 or less

Customers
 JON203 Jones Construction
 PCS001 Preston Constru. Serv

CustNo:	CName:	CorrespName:	Fax:

The screen on the left appears when you click on the **Copy Quote** button.
 WHAT IS FREQUENCY??

If you click on **Delete Quote**, a window will appear stating that it is deleting the specified quote. Click Yes to continue, No to return to the Quote screen.

Clicking on Exit will take you back to the bid screen.

The Final Quote Screen

The screen below is the final screen before you fax or print the quote. If you wish to preview the quote you can also click on the preview box before clicking on print or fax.

The screenshot shows a software window titled "Quote". At the top, there are buttons for "Job Conditions", "Print", "FAX", and "Exit". Below these are checkboxes for "Preview" (unchecked), "Print" (checked), "Unit Price" (checked), and "Show Bid Total" (checked). The main area contains several fields: "Quote Date" (11/19/2000), "BidDate" (9/28/2000), "Cust. Rep." (Jack Jones), "Customer" (Jones Construction), "Address" (4654 4th Street), "City" (Ansaheim, CA 654645), "Bid Name" (Rolling Hills Lane), "Location" (empty), "Fax No." (6546546546), "Quote No." (46), "Freq" (monthly), "PerCent" (100), and "Days" (30). At the bottom, there is a table with columns: Ph, Item, Description, Quant, U/M, Unit Cost, Unit Price, and Total. The table contains five rows of data. A "Quote Total" field at the bottom right shows "\$44,457.00".

Ph	Item	Description	Quant	U/M	Unit Cost	Unit Price	Total
1	7	Asphalt	5,000.0	TN	0.047	0.054	270.00
1	8A	Cold Planing 2"	140,000.0	SF	0.200	0.230	32,200.00
1	9	Cold Planing Header Cut	3,500.0	LF	0.550	0.632	2,212.00
1	10	Double Yellow Striping	4,500.0	LF	1.000	1.150	5,175.00
1	11	Skip White Striping	5,000.0	LF	0.500	0.575	2,875.00
1	12	Markers	1,500.0	EA	1.000	1.150	1,725.00

The information about the bid and quote are located on this screen. This is the last chance to make any corrections before sending off the fax.

If you click on Job Conditions, the following screen appears.

The screenshot shows a software window titled "Enter Job Conditions". At the top, there are buttons for "Std. Conditions", "Renumber", and "Exit". Below these are buttons for "Copy Conditions", "Del", and "Ins". The "Quote No." field contains the value "46". Below the buttons is a large empty text area. At the bottom, there is a "Job Condition Memo:" label followed by a text area.

If you click on Std. Conditions, you will see the conditions screen you worked with on the previous page. Renumber is used to renumber your conditions. If you wish to delete or insert conditions, use the Del and Ins buttons. To copy your conditions, click on Copy Conditions. You will be able to choose to either copy by customer from a specific quote or by current job from a current quote. Click on Exit to return to the quote editing screen.

Current Quote

Selecting **Current Quote** from the Fax menu will take you into the Quote Program. This has been discussed in the previous two sections. The most current quote you have been working with will appear.

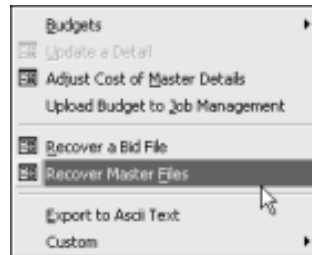
Working with Old Quotes

If you select **Get Old Quote** from the fax menu, you will enter the Quote Program, but there will not be an active quote on the screen. You will have to select a quote from the pull-down menus to continue.



Chapter 12 - Utility

The utility menu is a collection of useful functions that make the real world of handling of bids a whole lot easier.



Budgets

Creating a Budget

To create a budget from a bid, highlight **Budgets** from the Utility menu on the main menu and select **Create a Budget**..

Filter by Estimator or Customer

Sort the list of bids by Description, Date or Customer.

Click here and you will be allowed to enter how many days before and after today you want the range to include.

Use a different directory.

Description	Date	Customer
Hometown Avenue	12/25/2001	Preston Construction Co.
simple bid	7/22/2002	Anaheim, City of
Tutorial	7/19/2002	Anaheim, City of
Los Angeles Street	6/21/2002	City of Los Angeles
Anaheim Downtown	5/27/2002	Anaheim, City of
Rolling Hills Lane	5/5/2002	Preston Construction Co.
Parking Lot	4/15/2002	City of San Diego
City Development	3/20/2002	Anaheim, City of
Main Street	2/20/2002	Anaheim, City of

Select an estimator's name from the pull-down menu next to Est to show only bids from that estimator. To take the filter off, click on the Est button.

Select a customer's name from the pull-down menu next to Cust button to show only bids from a specific customer. To take the filter off click on the Cust button.

To show only a certain range of date, enter a beginning and ending date or click on RANGE. You will be asked to enter a number of days before and after today's date to be allowed in the range.

Click on ALL to show all bids.

You can sort the bids by Description, Date or Customer by clicking on the circle next to each word in the Sort By section.

Double-click on a bid to select it. This window will appear. It is the same as the information you wrote when creating the bid. Click on More Info to see additional information about the bid. You can change any of the fields you would like except for Bid Name and Agency/Customer which are grayed out. Click on Open Budget to continue.

The screenshot shows a dialog box titled "BUDGET SUMMARY". It has a standard Windows-style title bar with minimize, maximize, and close buttons. The dialog contains several input fields and buttons. The "BidLine" field is "Autonal - Budget". The "Agency/Customer" field is "Anshem, City of" with an "Add Customer" button next to it. The "BidDate" field is "7/19/2002" with a "Get Date" button. The "BidTime" field is "5:00:00 PM". The "Estimator" field is "Bob Preston". The "DetMarkup" field is "10 %". The "Dec Place/Item Qty" field is "2". The "Dec Place/Unit Price" field is "2". There are three buttons at the top right: "Open Budget", "Cancel", and "EXIT". There is a "More Info" button at the bottom center.

When a budget is first created from a bid, the two will be identical. Changes can be made to either one and the differences will be reflected during the upload. The important thing to remember about budgets is *the bid price is fixed*. Once an item of work is bid at a certain price, the program will not prevent you from changing it, but will preserve the bid price whenever possible.

For example, when modifying and saving an activity from an item of work, the gray (ESTIMATED) line is usually applied to the blue (ACTUAL) line so they are the same. With a budget, however, the unit price for the gray line, just the opposite. The percent markup is adjusted to balance everything out.

For a budget, the markup becomes less important, so the program takes liberty in adjusting it and holding the unit price whenever it can. If you Apply Markups to a Budget, it will have no effect, since the price will not be altered.

Loading a Budget

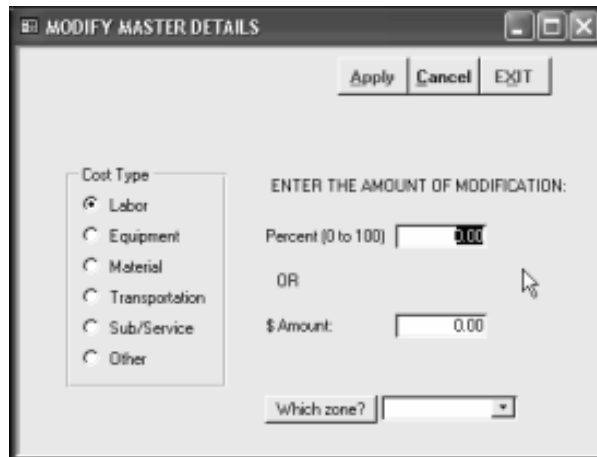
To load a budget, highlight Budget from the Utility menu and select **Load a Budget**. The following screen appears. Select a budget from the pull-down menu. Click on Open Budget to work with the budget.

Deleting a Budget

To delete a budget, highlight Budget from the Utility menu and select **Delete A Budget**. You will see the same screen that you saw when you created a budget. Double-click the budget you would like to delete. You will be asked if you would really like to delete that budget. Click Yes if you are sure that you will not need the budget in the future. Click No to keep the budget.

Adjust Cost of Master Details

If you select **Adjust Cost of Master Details** from the Utility menu, the following screen will appear.



Choose a Cost Type by clicking on the circle next to it. You can then choose to modify the cost by percentage or by amount. At the bottom, choose which zone you would like to apply the modifications. Click on the Which zone? button to apply to all zones. Click on Apply to save.

Uploading Budget to Job Management

To upload a budget, select **Upload Budget to Job Management** from the Utility menu. The following screen will appear allowing you to select the budget you wish to upload. Use the pull-down menu to see the available budgets. When a budget is selected the bottom half of the screen shows the bid number, bid name, job name, and bid date. You are only able to change the job name. Click the **Create Job Management Record** to continue.

The screenshot shows a software window titled "Job Management Upload from Budget". At the top, there is a "Select Budget" dropdown menu showing "Tutorial - Budget". To the right of this are two date fields: "First Budget Date" with the value "4/20/2002" and "Last Budget Date" with the value "8/18/2002". Above these date fields is a "Range" button, and to the far right is an "Exit" button. Below a horizontal separator line, there are four input fields: "Bid Number" containing "1", "Bid Name" containing "Tutorial - Budget", "Job Name" containing "Tutorial - Budget", and "Bid Date" containing "7/19/2002". To the right of these fields is a "Create Job Management Record" button.

A window will appear asking you to enter the desired ten character number. DOES ANY-THING HAPPEN THEN??

Recover a Bid File

The second section of the Utility menu involves recovering bids and master files. Select **Recover a Bid File**. The same window will come up that was used to create a bid. Double-click a bid to select it.

Recover Master Files

When you select **Recover Master Files** from the Utility menu, the following window appears.



Click on the box next to the items that you would like to recover. A check mark will mark that you are recovering the selection. Click on the name or box again to unselect the object. Click on Apply to recover the files. If the recovery is successful, the program will beep and a notice will come up saying that the files were successfully recovered.

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