

Bids, Quotes, Estimates, and Proposals

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Program Features

Bids, Quotes, and Estimates is a multi-purpose program that:

1. Quickly and easily creates professional looking bids, quotes, estimates, and proposals by simply clicking on items on pre-defined lists. Includes formatting tools that add blank lines, category headings, explanatory text blocks, footnotes, disclaimers, and signature blocks to allow customization of the appearance and content of each bid.
2. Automatically selects the price to be quoted based on a price code assigned to each customer. Selections can be made from up to eight specified prices per item.
3. Automatically calculates the price for each item and the total amount of the bid on the basis of price, quantity, and tax rate.
4. Creates customized price lists from information stored in the price list database included as part of the program.
5. Prints bids on pre-printed forms, plain paper, or company letterhead, prints custom price lists on plain paper, prints product information and pictures on plain paper, or eliminates printing completely by allowing direct faxing of bids and price lists when the computer is equipped with a modem and fax software.
6. Stores completed bids and custom price lists for reference or revision and re-submission.
7. Provides quick access to price information when not preparing a bid.
8. Provides quick access to product information including photos and drawings, and prints product data sheets from information stored in the product information database included as part of the program.
9. Provides quick access to customer information from customer profiles stored in the customer database included as part of the program.
10. Provides a full selection of tools to allow you to easily import data and maintain/update your price lists, customer information files, and product information database. Includes tools that automatically calculate item prices and perform global price list updates based on user-defined pricing criteria.
11. Stores all data in a standard Microsoft Access database format allowing import of data or direct access to the data files by many other programs.

Note: Registered copies of the program include an introduction\graphic tutorial in HTML format that can be viewed using an Internet browser (Netscape or Microsoft Internet Explorer). The overview is located on PROGRAM DISK 4. To view the presentation:

1. **Start your Internet Browser.**
2. **Click on FILE and select OPEN FILE.**
3. **Type c:\bidpgm\biddemo.htm in the Open Window or select c:\bidpgm\biddemo.htm from the Open File/Browse Window.**

How to Set Up the Program

The first time you run the program, you will automatically be taken to the **Basic Setup Screen** where you must supply a company name and product serial number to gain access to other portions of the program.

1. Enter your **Company Name**, and other company information exactly the way you want it to appear on your printed documents.
2. Enter the **last five digits** of the program **Serial Number** located in the lower right corner of installation disk number 1 (Example: PA-10098-**12345**).

WARNING: Make certain your COMPANY NAME and SERIAL NUMBER are correct before exiting Setup. They cannot be changed on registered copies of the program after the initial Setup has been completed.

3. Optionally, specify:

A **Password** to be required for all future access to the Setup portion of the program.

B. A custom background screen design.

When you exit the setup portion of the program or go to another setup screen, the information shown on the Basic Setup Screen will automatically be saved.

4. Click on **More Setup** at the top of the screen and select:

Printing. A screen will appear that allows you to set the program printing options.

Tax Rates\Price Codes to specify the tax rates to be available when preparing bids and the identifiers (Example: List Price) for the up to eight prices that can be specified for each item.

Delete Bids. A screen will appear where you can **specify your starting bid number.**

5. Click on **Price List Setup** at the top of the screen and the **Price List** screen used to create and maintain your price lists. will appear. You do not have to enter any price list information as part of your initial setup but the program will be of only limited value until users can select items from the price lists created here.
6. Click on **Product Info Setup** at the top of the screen and the **Product Info** screen used to create and maintain your product information database will appear. You do not have enter any product information as part of your initial setup. When product information including specification sheets and illustrations is added, the information will be a valuable tool in preparing bids or custom price lists, or answering customer questions about your products.

After you have performed your initial Setup, you can return to the setup screens at any time to change the settings **The only items that cannot be changed are your company name and the program serial number.**

How to Add Customers to your Customer Database

The program includes a separate Customer Database that can serve as a convenient source of information about your customers. The database can be easily imported into and used by other applications. **Bids can only be created for customers in the database.**

Unlike price and product information, new customers can be added and customer information can be changed from within the working portion of the program. Customers can only be deleted , from special screen in the Setup portion of the program.

To add a new customer:

1. From the Bid Sheet screen, click on the **Customers Button**. A customer information window will appear where you can add new customers or update existing customer information. You can also add new customers or make changes by going to the **Customer Database** screen listed on the Main Menu.
2. To add a new customer, click on the **New Customer Button** and enter the information for the new customer.

A company name is required. In the case of bids to private individuals, the name of the person is typically used as the company name

To assign a customer **Price Code**, click on the **Codes Button**. A list will appear from which you can select a Price Code. The code determines which of the up to eight prices for an item is used when you add items to the bid sheet. The Price Code can be changed while a bid is being created or item prices on the bid sheet can be changed manually to provide the flexibility needed to deal with special situations. **A Price Code is a required item since it determines which of the eight possible prices will be used.**

To assign a **Tax Rate**, click on the **Rates Button**. A list will appear from which you can assign any of the tax rates specified in the Setup portion of the program. When creating bids, the tax rate selected is automatically used but can be changed on an item-by-item basis as necessary.

3. When finished, click on the **Save Customer Info Button** to save the data to your Customer Information database.

How to Delete Customers

To delete a customer from the Customer Database:

1. Go to the Setup screen. Click on **More Setup** and then click on **Import\Delete Customers**.
2. When the Customer List screen appears, click on the desired customer and then click on the **Delete Highlighted Customer Button** to delete the customer.

If you have a lengthy customer list and need to find a customer, type the company name (or a partial name in the Company Name window and click on Find Now. If looking for a company name that starts with C, if you type in C and click on Find Now, all company names starting with the letter C will be listed.

Warning: If you delete a customer and there are existing bids for the customer, no customer information will be displayed when the bids are viewed or printed.

How to Create a Bid/Quote/Estimate

A Bid/Quote/Estimate is a written proposal that includes part numbers, descriptions, tax rates, quantities, extended prices, a subtotal of the extended prices, the total amount of the tax on all taxable items, and the total price. The document can optionally include at the end of the document, notes for any items listed, a disclaimer, and a signature block. As items are added to the bid, all prices and taxes are automatically calculated.

To provide the greatest flexibility in preparing the document, items can be added as line items (Part number, description, quantity, tax rate, and extended price) or as blocks of text (Part number, a block of text up to 1200 character long and a price).

In addition, blocks of explanatory text, blank lines, and title lines (to divide the document into groups of items) can be added.

To create a bid\quote\estimate\proposal:

1. If not already on the Bid Sheet screen, **click on Bid Sheet** from the list of choices displayed at the top of the current screen.
2. Click on the **New Bid** Button. If a bid is currently displayed, a window will open that will give you the option of using the current bid as a starting point or creating from scratch. Select an existing customer or add a new customer to your database. See Customer Information window for more information. You will see the customer name and a bid number on the bid sheet.

The **bid number** is automatically assigned by the system (The starting bid number is specified in Setup on the Delete Bids screen.). After a bid has been saved, the number can be amended without disrupting the numbering sequence. If, for instance, bid 10000 is created and saved, you can go back later, make revisions, and save the new version as 10000A by manually changing the bid number. Bid number 10001 will remain available for the next customer.

Note that each customer is assigned a Price Code that determines which of up to eight prices per item will be quoted and a tax rate. Both the price and the tax rate for each item can be changed when preparing the bid.

Some customers may provide a **Customer Reference Number** to uniquely identify a bid in their record keeping system and then refer to that number rather than your bid number. If such a number is provided, enter it in the **Cus. Ref #** window. Note: The Customer Reference Number must be supplied before exiting the Customer Information screen to start work on the bid.

3. Click on the **OK\Close Window Button** to return to the bid sheet.
4. Add items to the bid in any of three ways:
 - A. Add an item from one of your pre-defined parts lists. The name of the currently displayed list is show in the Current List window. To select another list, click on the button to the right of the window then click on one of the lists to make it your current list.

To add a listed item to your bid, click on it to highlight it and then click on the **Select Item Button** to move the item to the bid sheet - **or double-click on the item** and it will immediately move to the bid sheet. The price used (Price 1 through 8) will be determined by the Price Code assigned to the customer.

When you add an item, any price list note for that item is automatically added to the Notes section of the bid. To view and edit the notes, click on the **Bid Notes Button** on the Bid Sheet.

- B. Click on the **New Item Button** and a window will appear where you can enter complete information **in a line item format** for any item that might not be included in one of your pre-defined price lists.
- C. Click on the **Add Text Button** and a window will appear that allows you to add a text format item to your bid at a location one line above the currently highlighted line. If all you want to do is add some information, leave the Part Number window blank. When text only is added to the bid sheet, (TEXT) will appear in the part number window for the entry.

When selecting items, if you click on the **Product Info Button**, a window will appear that displays a product specification sheet and product illustration (if available) to aid you in making your selections.

- 5. To adjust quantities or to make other changes to the items on your bid sheet, click on an item to highlight it and then click on the **Edit Item Button** and a window will open that allows you to make your changes. If you **doubleclick** on an item, the editing window will open without clicking on the Edit Item button. As the information is changed, the extended price and totals are automatically recalculated.
- 6. To make additional changes to your bid:

Click on the **Delete Button** to delete the highlighted item.

Click on the **Insert Button** to insert a blank line. If you highlight a blank line and select an item on the Parts List, the item will be added to the bid at the location of the highlighted blank line. To manually enter an item at a location of a blank line, click on the Edit Item button.

Click on the **Add Title Button** and a window will appear that allow you to add a title line to the bid at a location one line above the currently highlighted line on the bid sheet. Titles add readability to your bid by breaking the items down into categories (Valves, Hoses, etc.).

Click on the **Add Text Button** and a window will appear that allows you to add text items to your bid at a location one line above the currently. If all you want to do is add some information, leave the Part Number window blank. When the text is added to the bid sheet, (TEXT) will appear in the part number window for the entry.

- 7. When the bid is complete, click on the **Print Button** to print your bid. A window will appear that displays your print options.
- 8. Click on the **Save Button** to save your bid. Once a bid has been saved, you can call up that bid to view what has been quoted or make changes. If you click on the Cancel Button, the bid will not be saved.

How to Edit Bid Notes

When an item is added to the bid sheet, any note for that item is automatically added to the notes portion of the bid. When a bid is printed, the notes can be included as part of the printed bid if desired. To view\ edit the notes:

- 1. Click on the **Bid Notes Button** on the Bid Sheet screen and the Bid Notes window will be displayed.
- 2. To edit a note, click on the desired item **or doubleclick** on the item to move the item to the Edit window. Make any needed changes and then click on the **Add New/Edited Note Button** to update your notes.
- 3. To delete a note, click on the desired note to highlight it and then click on the **Delete Note Button**.
- 4. To insert a note, click on the **Insert Note Button** and a note with (Blank Line) as its Part Number will

be inserted immediately above the currently highlighted line. The new line can be edited to include any information you want to provide.

5. When finished, click on the **Close Window Button** to return to the Bid Sheet. When you print the bid, you can choose whether or not to include the notes in the printed output.

How to Create a Custom Price List

A Custom Price List is simply a list of part numbers, descriptions, and prices. Creating custom price lists allows you to provide customers with price lists that include only items of interest. When you print a custom price list, you can include up to 4 prices to be quoted to the customer. Once a custom price list is saved, it can be called up and re-printed at any time using the same or different prices.

To create a Custom Price List:

1. Click on the **Custom Price Lists** screen from the list of choices displayed at the top of the current screen. If in Setup, exit setup then select the Custom Price List screen.
2. Click on the **New List Button** and a window will appear where you can enter a name for the new list. Note that the name is for identification purposes only. You can specify a printed title when you print the price list.
3. Click on the button to the right of the List window and a list will appear showing the names of the available lists. Click on the desired item and the list will be displayed in the window in the lower portion of the screen.
4. Click on an item on the list and it will immediately be moved to the Custom Price List Window in the upper portion of the screen. If you click on the **Add All Items to Price List Button**, all items in the List will be added to your list.
5. To make changes to the items on your list, click on an item to highlight it and then click on the **Edit Item Button** and a window will open that allows you to make your changes.

6. To make additional changes to your list:

Click on the **Delete Button** to delete the highlighted item.

Click on the **Insert Button** to insert a blank line. To manually enter items, use the insert button to add the line, then click on the Edit Item Button to enter the desired information. If you highlight a blank line, then click on an item in the lower window and the item will be added to your list at the location of the highlighted blank line.

Click on the **Add Title Button** and a window will appear that allow you to add a title line to the list at a location one line above the currently highlighted line on the list. Titles add readability to your list by breaking the items down into categories (Valves, Hoses, etc.).

7. When the list is complete, click on the **Print Button** to print your list. A window will appear that displays your print options including; adding a printed title line, changing price column headings, and selecting which price columns you want printed.
8. Click on the **Save Button** to save your list. Once a list has been saved, you can call up that list to view what has been quoted or make changes. If you click on the Cancel Button, the list will not be saved.

Password (Gaining access to Setup)

Warning: Password protection provides a degree of security on single user programs such as this one. Highly skilled individuals who have access to the computer on which the program is installed may discover ways to manipulate data files without using the maintenance tools provided in Setup. Greater security is available on network versions of the program and in custom versions.

The Setup portion of the program can be password protected to prohibit unauthorized users from changing the program configuration or product and price information.

When the program is installed or at any time thereafter, a password can be specified on the Basic Setup screen. The password can be changed or eliminated at any time.

When a password exists, users attempting to enter the Setup portion of the program will be required to supply the password. **The password must be entered EXACTLY as it was defined, using upper and lower case letters where applicable.** A maximum of three attempts to enter the password correctly will be permitted. The attempt count starts with the first attempt after the working screen (Bid Sheet/Custom Price Lists) is displayed.

If a password is lost or forgotten, access to the Setup portion of the program can only be gained by calling the phone number specified for Technical Support for the program. Anyone requesting password assistance will be required to fax on their company letterhead, a written request for assistance, signed by an officer of the company. Technical support will then perform any necessary verifications and call the company phone number listed on its letterhead to provide the necessary assistance. To protect the integrity of information users have chosen to protect, Technical support personnel reserve the right to withhold password assistance until they are satisfied that the request is being made by an authorized individual.

How to Create a New Master Price List

The heart of the program is a collection of master price lists that contain part numbers, descriptions, prices, and product notes. After a master price list has been created, it can be displayed and all information for any item can be transferred to a new bid or custom price list by simply clicking on the item.

Note: Master Price lists are limited to a maximum of 500 items per list. Any number of master lists can be created.

To make access to price information as easy as possible, it is more desirable to create a greater number of shorts lists containing similar products than to create only a few lists that may contain hundreds of items.

All price list setup and maintenance operations are performed from the Setup portion of the program where access to the operations can be password protected, if desired.

To create a new master price list:

1. Click on **Setup** at the top of the Bid Sheet or Custom Price List Screen to gain access to the Setup portion of the program. Then click on **Price Lists** at the top of the Setup screen.
2. Click on the **Create New List Button** and a window will be displayed where you can specify a name for your new list. The name you select should be short and should clearly identify the contents of the list (Example: Hoses_Rubber). Note that Underline characters should be used instead of spaces to separate words (to assure that the program can find a specified list when the list is selected).

When a new Master Price List is created, a matching Product Information database is automatically created at the same time and is updated to include all part numbers as they are added to the Price List. Use the Product Information database to store specification sheets and pictures of the different items on the price lists.

3. Begin entering data for your price list by either typing the information in the spaces provided or importing the information from an external source (Import Price List Button). To type in your information:
 - A. You can include up to eight prices for every item. If you want the program to automatically calculate prices 2 through 8 based on the price you enter as Price 1, click on the **Auto Calc Button** and a window will appear where you can specify how you want the prices calculated. If you do not want the prices to be automatically calculated, click on **Disable** in the Auto Calc window. A red message line in the center of the screen indicates whether the Auto Calc function is turned on or off.
 - B. Specify whether the Item Type will be **Line Item** or **Block Text** by clicking on the black and white Radio Button to the left of your choice. Line Item is the correct choice for standard price lists and will allow you to enter a brief product description up to 40 characters long plus a brief product note. Block Text will allow you to enter a much longer description (up to 1200 characters but no note and will include only the product part number, description and price when the item is added to a bid. Block Text is typically used for a packaged product that includes several components. You can include both Line Item and Block Text entries in a single price list.
 - C. Enter a **Product Part Number**. The part number should uniquely identify the item. The maximum length allowed is 20 digits/characters. The part number can include numbers, letters, and dashes but should not include spaces (Example: AB2000-6). **A part number is required.**

Note: A part number can be a word that describes the item. Examples: Labor, Shipping,

Insurance, etc.

- D. Enter a **Product Description** for the item. If it is a Line Item format item, the maximum length for the description is 40 characters (Example: 1/4 inch sheet metal screw). **When specifying dimensions, do not use quotation marks or apostrophes. Use in. ft., etc.** If the item is a Block Text item, the description can be up to 1200 characters long.
 - E. Enter Your **Prices**. You can specify up to eight prices for each item. If the Auto Calc function is turned on, prices 2 through 8 will automatically be calculated on the basis of the price you enter as Price 1. If Auto Calc is turned off, prices for each price category can be entered manually.
 - F. If you selected Line Item as the item type, enter a brief **Product Note**, if desired (Example: Available only in blue.) Maximum length for your note is 255 characters. When you create a bid, the note can optionally be included as a footnote to the bid. If you specified the Block Text item type, a location for a note is not provided since any needed explanation can be included as part of the text.
4. When all information for the desired item has been entered, click on the **Put Item on List Button** to add the item to your price list.
 5. After you have made all additions/changes to your list, click on the **Save Button** to save the list. You can go back at any time and add new items or make changes to the information.

How to Edit a Master Price List

A master price list can be changed as it is created or at a later date. To edit/update an item:

1. To make changes to an existing item:

- A.** Click on the item in the Price List window at the bottom of the screen to move the information into the data entry windows, then make any needed changes.

To make price changes using the Auto Calc feature, Click on the Auto Calc Button to change your calculation criteria, then close the Auto Calc window and **re-enter the amount for Price 1**. Prices 2 through 8 will be re-calculated.

- B.** Click on the Put Item on List Button to replace the old information on the list with the changed information.

2. To delete an item from the list:

- A.** Click on the item in the Price List window to move the information into the data entry windows. The line will be highlighted, indicating that it is the currently selected item.

- B.** Click on the **Delete Button** to remove the item from the list.

3. To add an item to the list:

- A.** Select the location where you want to place the item:

If you want to place it at the end of the list, scroll down to the first empty line at the bottom of the list and click on the line to select it. The line will be highlighted, indicating that it is the currently selected line.

If you want to insert the new line between existing lines on the list, click on the line **below** the point where you want to add the line and then click on the **Insert Button**. A new line with (BLANK LINE) in the showing as the part number will be added to the list and highlighted.

- B.** Enter the information for the new item and click on the Put Item on List Button to place the new line on the list in the highlighted location.

4. After you have made all needed changes and additions to your list, click on the **Save Button** to save the information.

Product Information Database

The Product Information database is a collection of information (typically specification sheets or illustrations, or both) relating to the items you sell. When you create a new price list, a matching Product Information group is automatically created with listings for each part number. If new items are added to a price list later, they are added to the matching Product Information Group as well. If you delete an item from a price list, however, any Product Information for the part number will NOT be automatically deleted.

When adding items to the bid, clicking the Product Info Button in the Parts List window will display any information for the currently highlighted part number. Product Information can also be accessed when an existing bid is being viewed or when no bid is active by clicking on the Product Info Button on the Bid Sheet screen.

Adding Information

To add new information\make changes:

1. **If the Product Information Group and part number already exist**, click on the button to the right of the Group window to display the list of groups and click on the desired group to select. Then, click on the desired Part Number on the Part Number list.

To create a new group, click on the **Create New Group Button** and a window will appear where you can specify a name for the new group. Note that a corresponding Price List does not need to exist and will NOT be created when you create the Product Info Group.

To add a new Part Number, click on the **Add New Part # Button** and a new part number will be added to the current group.

2. Enter your new information\changes in the spaces provided:

The large text window on the screen is a simple text editor where you can enter , cut and paste text.

To import text, click on the **Import Text Button** at the bottom of the screen. A window will appear where you can specify the location and file name of the text to be imported.

Note that the file to be imported must be in ASCII text format and must have a .TXT file extension. If you have files stored in another format, open them in any word processor and save them as ASCII text prior to attempting to import them. Note also that the maximum size for an imported text file is 32K.

Note: Imported text will replace any existing text. To append new text to existing material, open the text file in a word processor, copy it to the clipboard, and paste it into the Product Info text window at the desired location.

To add an illustration, click on the **Select Picture Button** at the bottom of the screen. A window will appear where you can specify the location and file name of the illustration to be displayed. A Preview Button in the window will allow you to view thumbnail images of the illustrations to aid in making your selection.

Note that all illustrations must be in the standard Windows .BMP format. If you have images in other formats, open them and save them as .BMP files for use in the program.

Note: When an illustration is selected, a copy is NOT added to the program database. To be available to the user, the file must remain in the location specified when the illustration was selected.

3. When you have made all necessary changes and additions, click on the **Save Button** to save the

information for the current part number.

Importing Data From Other Databases

The data import capabilities provided in this program will allow you to import customer information and price list data from the following databases:

Access
DbaseIV
DbaseIII
FoxPro 2.6
FoxPro 2.5
FoxPro 2.5
Paradox 4X
Paradox 3X
Btrieve
ODBC
Excel 5.0
Excel 4.0
Excel 3.0

If your database is in a different format, you may be able to convert it to one of the listed formats using your database export capabilities or the import capabilities offered in various database and spreadsheet programs.

To import data click on the Import Price List button on the Price Lists screen or the Import Customer List button on the Import\Delete Customers screen in the Setup portion of the program. Then:

1. Select the type of database from which you want to import from the drop-down list for that window.
2. Click on the **Select Database Button** and a window will be displayed where you can select the database containing the data to be imported.
3. Select the table containing the data you want to import from the drop-down list for that window.

Note: The maximum number of items that can be included in any price list is 500. If, your table contains more items, try breaking it into smaller tables using the software used to create it, then import the resulting tables into different price lists.

4. The **Available Fields** window will show a list of data fields in the table that contains your data. Click a field you want to use and then click on the > button to move it to the **Selected** window or doubleclick on the desired field to move it directly to the Selected window.

NOTE: The order of the fields in the Selected Window must match the fields listed in the Bid Program Fields window. When Field 01 in the Selected window is imported, it will be imported into Field 01 in the Bid Program Fields window, etc. If the order is not correct, the fields in the Selected window can be rearranged by Dragging and Dropping them inside the Selected window. **If your database does NOT include information to place in a Bid Program field, put a (BLANK ENTRY) in the Selected window at that location.**

NOTE: When importing Price Lists a SERIAL NUMBER is required for every item. When importing Customer Lists, a CUSTOMER NAME is required.

NOTE: There are limits to the amount of information a bid program database field will hold. If the corresponding field in your data table is longer, the information will be truncated. See Database Specifications in this help file for a listing of program database field lengths.

In addition to the > button, other move buttons perform the following functions:

- >> Moves all fields to the Selected window.
- < Moves a highlighted field in the Selected window back to the Available window.
- << Moves all fields in the Selected window back to the Available window.

The list of fields in the Bid Program Fields window is predefined and cannot be altered.

6. When you have matched all desired fields in your data table to the target fields in the bid program table, click on the **Start Import Now Button** to start the import process.
7. After your data has been imported, use the program editing capabilities to make any necessary changes to the imported data. Change Price List data on Price List screen in the Setup portion of the program. Customers can be deleted on the Import\Delete Customer screen in the Setup portion of the program. Individual customer records can be edited in the Bid Sheet portion of the program.

Printing

The program will print bids, custom price lists, customer information, and product information to your printer in the same way as your other Windows programs using a Bubble jet or Laser printer. In some cases dot matrix printers will produce acceptable results. If you select a fax modem as your printer, your document can be faxed directly to the recipient without making a printed copy.

To start a print operation, click on the **Print Button**. A window will be displayed where you can make different selections to specify exactly what will be printed.

When printing a **Bid**, the selections that first appear will be choices specified in the Setup portion of the program but can be changed as necessary for the current printout. When ready to print, select Print on Plain Paper, Print on Letterhead, or Print to File. If you select Print to File, a window will be displayed where you can specify a file name. Items printed to a file are saved as standard ASCII text files that can be opened in any word processor. Note however, that when an item is printed to a file some formatting will be lost.

If you choose to include item pricing on your printout, unit and extended prices for each item will be printed. If you do not elect to print the item prices, only the Subtotal, Tax, and total amount will be printed.

If you choose to print notes for the items listed on a bid, the notes will start on a new page added to the bid. If you choose to print a signature block, it will be added as another new page at the end of the bid.

When printing a **Custom Price List**, the window that allows you to customize the printout provides the option of printing up to four price columns, customizing the column headings, customizing the title printed at the top of the printout, and specifying whether or not a standard disclaimer will be printed. If you change any of the print specifications, the Save Button will turn yellow. Clicking on the button will save the print specifications, eliminating the need to repeat the specification process if the price list is reprinted at a later date.

When printing **Product Information**, you can print either the product information text or the product picture. If the text is displayed on the screen when you click on the Print Button, it will be printed. If the picture is displayed, it will be printed.

Note: When printing product pictures, the maximum size of the printed picture will be 8 inches wide by 4 inches high. Any portions of the picture that extend beyond those limits will be clipped.

For print operations to execute successfully, your printer must be turned on and selected as the active printer in Printer setup. If an error occurs during printing, Windows will display an appropriate error message. If a printing problem occurs, check your Windows printer settings and the printer itself.

Note: The printing of documents is controlled by Windows and your printer. Problems such as printing starting too low on the page, content at the bottom of the page being chopped off, and unwanted blank pages being printed have been documented by the users of programs of various descriptions.

In the case of this program, all column headings should be aligned with the information printed in the columns. On an older Epson laser printer, the headings do not align properly. The problem does not occur on another printer connected to the same computer.

If you encounter printing problems, contact your printer manufacturer to see if updated drivers that address your problem are available. This program offers a solution to common print positioning problems by allowing you to adjust the starting point for printing higher or lower on the page. If necessary change the setting in Setup.

Database Specifications

All database files used in the program are in standard Microsoft Access format constructed using Microsoft JET database engine, version 2.0. The file structures for database tables that may be exportable\usable by other programs are:

Bidprice.Mdb (Price List Database)

Serial Number	Text field	16
Description	Memo field	Memo*
Price1	Text field	8
Price2	Text field	8
Price3	Text field	8
Price4	Text field	8
Price5	Text field	8
Price6	Text field	8
Price7	Text field	8
Price8	Text field	8
Note	Text field	250
ItemType	Text field	1**

This database may include any number of tables

* Description length for Line item type entries is limited to 40

** ItemType codes are L = Line Item type, B = Block Text type

Note: If a field has no data, a space character is used to eliminate nulls

Bidprod.Mdb (Product Information Database)

SerialNumber	Text field	16
Picture	Text field	40
Specifications	Memo field	Memo

This database may include any number of tables

Note: If a field has no data, a space character is used to eliminate nulls

BidCust.Mdb (Customer Information Database)

Key	Key	Long*
Company	Text field	40
Address1	Text field	40
City	Text field	25
State	Text field	15
Zip	Text field	10
Country	Text field	15
Email	Text field	40
Contact	Text field	25
Title	Text field	25
Phone	Text field	20
Phone2	Text field	20
Fax	Text field	20
AccountNumber	Text field	20
PriceCode	Text field	2
Wkext	Text field	8**
Note	Memo field	Memo
TaxPct	Text field	6

This database consists of a single table named customers

- * Key is a unique id number.
- * Wkext is a telephone extension number field

Note: If a field has no data, a space character is used to eliminate nulls

Search Functions

To find a customer or bid on your Customer Information screen, click on the **Find Customer or Find Bid Button**. The available search fields will turn yellow indicating that you can search using any of those criteria

Click your mouse on one of the yellow windows and begin typing in your search criteria. A list will drop down showing all records that satisfy the search criteria.

Click your mouse on the desired selection on the list and the full record will be displayed. To narrow the list of choices, continue typing in the selected window - If, for example, you type J in the name window, only the customer names starting with J will be listed. If you type JO, the list of names will include only those starting with JO.

Advanced Search Techniques: The following techniques can be used when trying to find a record:

The * (asterisk symbol - Shift key and 8 key pressed at the same time) is a wildcard, meaning that it can be any character.

>If you type : just an asterisk [*]as your search criteria, all records in the database will be included in the results.

>If you type: a letter followed by an asterisk [A*], all records starting with A in the specified search field will be included in the results. Use this approach to find all customers in your database whose names begin with A.

Remember, however, that the search is based on the first letter/number in the searchfield. As a result, if you search using Name as your searchfield you will get everyone whose first name begins with A - assuming that you enter names in the standard way (Name: John Smith)..

>If you type: an asterisk followed by a letter [*A], all records with an A anywhere in the specified searchfield will be included in the results.

>If you type: an asterisk followed by more than one letter [*ALLEN], all records with an ALLEN in the specified searchfield will be included in the results. **Use this approach to search by last name when you enter the full customer name in the Name field.**

Tips and Techniques

Create Special Price Lists: Anything you might choose to add to a bid or custom price list, including frequently used blocks of text, can be placed in a price list and selected as needed. Try creating price lists for labor, predefined shipping charges, or any other items that frequently appear on your documents. Note also that while each item requires a Part Number, that part number can be a word such as Labor and will appear as such on your printed document.

Add Unlisted Items to a Bid or Custom Price List: Normally, items are added to a bid or custom price list by selecting from pre-defined price lists. To add new items that aren't on one of your lists, place a blank line on your bid/custom price list, click on the Edit Item Button, and type in whatever information you want to appear on the bid/custom price list.

Recycling Existing Bids: It is not unusual to submit what is essentially the same bid to more than one customer. To avoid starting every new bid from scratch, find an existing bid that is similar. When the bid appears on the screen, click on the New Bid Button. A window will appear that gives you the option of using the currently displayed items as the starting point for your new bid, or clearing the bid sheet.

Making Your Printed Documents Look Their Best: Add title lines and blank lines to your bids and custom price lists to improve their appearance. When printing on plain paper, use high quality stationary paper. When printing pictures, use one of the special photo quality papers available from your computer or office supply store.

Importing Data: The program imports data in standard data types. If your data is not currently in one of the listed formats, try exporting it to a listed format using the software used to create/manage your database or import it into a program such as an Excel spreadsheet and save it there. When creating new files for importing to this program, adjust the field lengths and number of fields to match those listed in this program's database specifications.

When adding product information, if your specification sheets are not already in standard ASCII text format, open the files in any word processor and save them as .TXT files.

When adding pictures, if the pictures are not in the standard Windows .BMP format, open the files in any paint or graphics processing program and save them as .BMP. Reducing the size and number of colors reduces the amount of disk space required.

Using Program Data: The data files used by this program are in standard Microsoft .MDB format and can be imported into or used directly by a variety of other programs. The product information and photo files are also in standard formats that can be used by a variety of other programs.

Creating Custom Documents: To create special proposals, try saving your bids and custom price lists as text files and then opening those text files in a word processor where you can modify them as needed by adding text, changing fonts, inserting illustrations, etc. When finished, print the document in your word processor and save it as a word processor file.

Capturing Screen Images for Use in Other Programs: Windows has a little known feature that allows you to copy the entire screen to the Clipboard by pressing ALT-PRINT screen. Once the image has been captured, it can be pasted into a document created in another program or the image can be saved by pasting it into a new picture created with a paint or graphics processing program.

Use the TAB Key. To move from data field to data field quickly, press the TAB key. To move backwards to the previous field, press the SHIFT and TAB keys at the same time. Pressing ENTER will not normally move you to the next field. The ENTER key, however, does perform a useful function. When a button on the screen has a dotted line around whatever is written on the button, pressing the ENTER key is the same as clicking on that button.

Network Applications

No networking capabilities are provided in this single user version of the program. All data files must reside in the application directory on the users computer. Any product information .TXT files or pictures can be located anywhere on your system - they do not have to be located in the application directory.

Data files, however, may be copied to different computers on which the program is installed to provide users with access to the same price (bidprice.mdb), product (bidprod.mdb), and customer information (bidcust.mdb).

Network versions are available.

Technical Support

Technical support for the program is available at no charge during normal business hours, Monday through Friday by calling **972-289-0942**. Assistance may also be available at other times, depending on the availability of support personnel.

Before calling for assistance, check the program help files and printed manual for guidance in solving common problems.

Database Tools

The Database Tools available in the Setup portion of the program are a selection of utilities used to perform various database maintenance operations.

To protect valuable data, your databases should be backed up on a regular basis. All data should be backed-up before performing any database maintenance operations.

Back-up Data will back-up all program data files, typically to floppy disks. If more than one diskette is required, the program will prompt you to insert a fresh diskette when the current diskette is full. The files copied to the back-up location are:

Bidcust.Ldb
Bidcust.Mdb (customer information)
Biddata.Ldb
Biddata.Mdb (bids)
Bidprice.Ldb
BidPrice.Mdb (price lists)
Bidprod.Ldb
Bidprod.Mdb (product information)
Bcustom.Ldb
Bcustom.Mdb (custom price lists)
Binifile.Ldb
Binifile.Mdb (program configuration information)

Back-up is intended primarily to allow users with small databases to back-up their data on floppy disks. The maximum size for any file stored on a standard 3.5 inch floppy diskette is 1.4 megabytes. Users with large databases should use a tape back-up system or other storage device and the back-up software provided by the supplier.

When specifying the back-up drive, supply a drive letter only. The letter A is the standard designation for a floppy disk drive. On some older systems the target floppy drive may be B.

Restore Data will copy backed-up database files from their saved location to the bid program directory. The program will attempt to copy all files listed above in Back-up Data and display an error message if a specified file is not found.

To restore data, you must supply the location of the back-up files and the program location. The normal locations are pre-entered. If you need to make any changes, note the format used. A drive is a letter and a colon. If the files are in a specific directory, add a \ and the directory name. Do not add another \ after the directory name.

Compact Database. When records are deleted from a database, the record is no longer available for use but is not removed. Compacting a database will remove the deleted records. If a large number of records have been deleted, compacting the database will physically delete those records, reducing the amount of disk space used.

To compact a database, click on the appropriate button. Database files for which buttons are not provided will not normally benefit from compacting.

When a database is compacted, a back-up copy of the original database is made. The last letter in the backed-up database is changed from a b to a z. (Example: Biddata.Mdb is saved as Biddata.Mdz. If it ever becomes necessary to restore the original database, delete the .Mdb version and rename the .Lbz and Mdz file extensions to .Ldb and .Mdb.

Repair Database. Databases can become damaged in various ways. Repair Database will attempt to

salvage a damaged database but any damaged data will be lost.

When you click on the Repair Database button, a window will be displayed where you can select the database to be repaired from a list of all databases used by the program. Repairing a database that is not damaged will not change the database in any way.

Backgrounds

Custom backgrounds can be specified to customize the appearance of the program screens. Various backgrounds are provided with the program and can be selected in Setup. You can also create your own backgrounds using different paint and graphics programs.

NOTE: Most custom backgrounds are designed for displays set for more than 256 colors and may not display properly on systems set for 256 or 16 colors. To check or change your system display settings, select the My Computer on the Windows Desktop, then select Control Panel, then select Display, then select Settings.

If custom backgrounds will not display properly on your system, click on the Select Backgrounds button in Setup and select NONE.

To select one of the backgrounds provided, click on the Select Background button and click on one of the backgrounds shown on the list. To test your choice, click on the Test Background button. The selection shown in the Background Name window will automatically be saved and used on all program screens,

To add a custom background background of your own design, build the background as a 640 pixel wide by 480 pixel high Windows bitmap image (.BMP) in a paint or graphics program.

Give the image a name no longer than eight characters (Example: 12345678.Bmp) and **save it in the Bidpgm directory/folder**. The file cannot be accessed if it is stored in another location.

To use your custom background, go to the Setup portion of the program and type the file name in the Background Name window (Example: 12345678.Bmp). Click on the Test Background button to view the new background.

Master Price Lists

Master Price Lists are created and maintained in the Setup portion of the program where they can be password protected.

When you create a bid or custom price list, you can select items from your master price lists for inclusion on your new bid or custom price list.

A separate Master Price List screen can be accessed when not creating a bid or custom price list to view your lists and find price information. The lists cannot be edited from that screen but your full master price lists can be printed. Use the Custom Price List screen to create the price lists you distribute to customers.

