

Section 1

Introduction

The User's Guide and Program Help system have been written to provide you with a detailed reference for Quick Bid. At times, you may be directed to Program Help from the User's Guide. Every effort has been made to include as much detail as possible. The Table of Contents and Indexes are valuable resources to help you locate information quickly and easily.

User's Guide

This guide is intended to be a compliment to Quick Bid software. The sections are presented in an order intended to help new users understand the software. The User Guide provides detailed information about Quick Bid tools and commands. It is designed to assist you in applying program features to your bidding projects. Use it as a reference tool along with the Program Help system in your day to day work with Quick Bid.

Typographic Conventions

- Terms of importance, titles to dialog boxes and main menu items will be Capitalized and placed in **bold** for easy recognition when skimming through pages.
- Menu items you are instructed to choose appear in bold with the greater than (>) symbol separating each menu level. For example, if you are instructed to select the Open command in the File menu, it appears as **File > Open**.
- Helpful hints or information about the topic are provided throughout the document. They will be labeled, '**NOTE**' (all caps and bold font to catch your attention).
- Several topics will have more detailed steps outlined in either another section of the user guide, or the Help System. They will always be referenced in italics and underlined. For example, "See *Section 5, Master Menu Lists* for more information."

Program Help

To locate information in the Program Help about a specific dialog or window, press F1 on your keyboard. Information about the screen you are on will appear.



Anything that is underlined, appears in blue text, or both is a link to additional information. Click on a link to access additional information. Sometimes you will have to click on the link again to hide the information if you like. These links have been placed throughout the documentation to help you get information when and where you need it.

Related topic links appear on many of the pages. These are included to help you find information that is related to the current page you are viewing. If there is only one related topic, you will be directed to that topic. If there are two or more related topics, a pop-up box will appear with the topics listed. Click on a topic name to go to that topic.



NOTE: You will find notes throughout the pages of the Help System. These notes provide additional information and important information that will help you in the program.

At the bottom of the Table of Contents you will find a set of Frequently Asked Questions. These can be helpful in guiding you through particular aspects of your project.

Contents Tab

The **Contents** tab provides a breakdown of the Help topics. To view this guide, click the **Contents** tab. Each topic is represented by a **Topic** icon . Open a topic by clicking the  icon next to the topic, or double click the **Topic** icon for the same results.

Below each topic are sub-topics represented by a **Sub-topic** icon . Clicking a sub-topic will display its contents in the right-side pane.

Close a topic by clicking the  icon, or double click the **Open Topic**  icon.

Index Tab

The **Index** tab shows a list of indexed topics in alphabetical order. It should be used like a book's index.

You may type the first few letters of the word or topic you are looking for in the keyword list. This will filter the list down to display only topics that start with the letters you entered. If you can't locate a particular item, try reducing the number of words in the search. For instance, instead of searching for Creating Alternates, try typing in Alternates. This usually helps you to locate information quickly.

You may also search for a topic by scrolling through the keyword list manually. Double-click on any of the keywords and the corresponding topic appears in the right-hand pane.

Search Tab

You may want to search to locate every occurrence of a word or phrase in the guide. To search for a word, click the **Search** tab and then type the word(s) you are looking for. When the list of topics displays, Double-click the topic you want to have displayed. The corresponding topic and its contents will display in the right-hand pane.

The **Search** tab works by listing every topic in which the word you typed in appears. Usually, this means you will see a large list.

Glossary Tab

The **Glossary** tab enables you to quickly look up the definition to commonly used terms. The terms are in alphabetical order. When a term is highlighted the definition will appear in the window below.

Use the scroll bar to search for a term, or click inside the term box, and type the first letters of the word. It will jump to the alphabetic location you entered.

Quick Tips

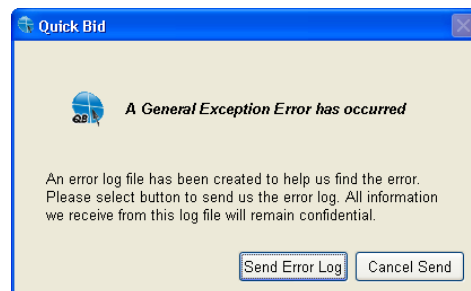
Using Tool Tips - If you do not understand what a button is for, hover the mouse over it. A tool tip will appear.

Using the Status Bar - If the program seems like it is processing information but you are unsure of what is happening, try looking at the status bar. The status bar is located at the very bottom of the image window. It displays information about what Quick Bid is doing internally. It also contains the current date, and if the database is set to require a login and password, the user's name will appear as well.

Using Context Menus - You can right-click on most objects and within most windows to view context menus with options available for use.

Using Expand/Collapse Option - You can expand any folder, condition type or other heading by clicking on the [+] plus sign next to it. You can collapse any folder or heading by clicking the [-] minus sign next to it.

Using Error Log Tracking - If the program encounters errors to the application a dialog box will be triggered. The dialog box will display a message letting you know that an error has occurred. Report the error to On Center Software by clicking the Send Error Log button. Clicking the Cancel Send button will close the dialog box without sending a report to On Center Software.



Technical Support

On Center Software Technical Support is available Monday-Friday, 8am - 5pm, Central Standard Time. When requesting support, please send complete details of the question or problem including:

- Your Full Name
- Your Company Name
- Your Client ID
- Version with build number (Select Help > About Quick Bid)
- Windows Platform (2000, XP)
- Complete description of the problem
- Steps used to recreate the problem

On Center Software support and advisors are available to help answer your questions through a variety of media:

- Email support@oncenter.com
- Fill out the support Web Form at www.oncenter.com/support/
- Call toll free at 866.689.5687 (Only for those users who have a current support contract.)

If you have suggestions or comments on how we can improve the product, we would love to hear from you. Your feedback is important to us and proper attention will be given to all communication we receive from you.

- Email: requests@oncenter.com, ATTN: Feature Requests
- Fax: 281.297.9001, ATTN: Feature Requests

Section 2

Installation & Authorization

Quick Bid System Requirements

The following table lists the minimum requirements for running Quick Bid. The recommended requirements, however, will allow your program to run faster and with greater screen resolution.

	Minimum	Recommended
Windows Operating System	Windows® 2000 (SP4), Windows XP (SP2) or Windows Vista (program will not run on Windows 3.X, Windows 95 or Windows 98)	Windows XP (SP2)
Processor	32 Bit, Pentium® III, 500 MHz (program is not supported on 64 bit)	32 Bit, Pentium IV, 1 GHz (program is not supported on 64 bit)
Memory	512 MB	1024 MB or more
Monitor/Resolution	Super VGA (800x600)	XGA (1024x768) or more
Free Hard Drive Space	500 MB	1 GB

Installing Quick Bid with Auto-run

1. Insert the **Profit Building Suite** CD into your CD drive.
2. On the **Product Startup** dialog, choose **Install Software**.
3. Click **Install Quick Bid**. The **Welcome** dialog will begin preparing for installation.
4. On the **Welcome** dialog, click **Next** to begin the installation.
5. Read the Update Notice and click **Next**.
6. Read the license agreement, accept the terms of the license by selecting the **I Accept** button, then click **Next**.
7. At the **Customer Information** dialog, enter your **User Name**, **Company Name** and **Client ID** (number that came with your Quick Bid package).

8. Select users for the application (all users is recommended), and click **Next**.
9. At the **Choose Destination Location** dialog screen, note the **Destination Folder**, and click **Next** to install Quick Bid to this location. If you want to install Quick Bid to another location, click the **Browse** button, and navigate to the new location.
10. At the **Select Features** dialog, make sure that **Quick Bid Application** is checked and select all the other features you want to install.
 - a. If you are planning to attend a few Training Sessions, click the **Training Databases** box.
 - b. Click **Next**.
11. Choose any of the databases you purchased with your application. The password for each purchased database should be included with your shipment. For information on what databases you purchased with your program, contact your On Center Software Account Representative.
12. Once you have selected your databases, click **Next**.
13. At the **Ready to Install** dialog, make sure you have chosen all of the features you want to install and click **Install**.
14. If you purchased any sample databases, enter the password for each database as prompted. Click **Next** at each prompt for your password. The **Next** button will only become active once the correct password is installed.
15. Once the installation is complete, click **Finish**.
16. If you have been furnished a hardware security device, install it now. See [*Installing Rainbow Sentinel Drivers*](#) on the following page for instructions.

Installing Quick Bid without Auto-run

1. Insert the Profit Building Suite CD in the CD drive.
2. Select **Start > Run**.
3. Click **Browse** and navigate to your CD-ROM drive.
4. Double-click on **Launch.exe**.
5. Click the **OK** button.
6. Follow instructions 1-15 from [*Installing Quick Bid with Auto-run*](#), located on the previous page.

Installing Rainbow Sentinel Drivers

1. Insert the **Profit Building Suite CD** in the CD drive, and make sure the **USB dongle is removed**.
2. Select **Install Software**.
3. Select **Additional Software & Drivers**.
4. Select **Sentinel Drivers**.

NOTE: If you do not have the CD, the drivers can be downloaded via the internet at <http://downloads.oncenter.com/Drivers/SSD5411-32bit.exe>.

Rainbow Sentinel Driver Troubleshooting

1. Verify your dongle is physically connected to your computer. If it's not connected, connect it.
2. Open Quick Bid.
3. From the **File** menu, click **Check Authorization**.
4. In the **License Authorization** dialog, your **Host ID** is listed. If this number is an 8 to 11 digit number, go to step 16 below.
5. If this number is a long character string (ex. 000D000F000E etc.) or blank, the dongle is not properly installed making it unrecognizable to your PC.
6. Close Quick Bid, and unplug your dongle from your PC.
7. Insert your Quick Bid CD.
8. Choose **Browse CD** (It should auto-run the Demo Shield installer).
9. Open the **Rainbow** folder.
10. Inside the **Rainbow** folder there is a file called **SSD5411 32-bit.exe**.
11. Double-click the file to open it.
12. Follow the instructions for the driver installation. Reboot your computer if prompted.
13. Once installation is complete and/or once computer is rebooted, plug in your dongle. Windows should now attempt to detect the dongle.
14. Open Quick Bid.
15. From the **File** menu, click **Check Authorization**.

16. Your **Host ID** should now appear as an 8 to 11 digit number. If it does, click **Reauthorize**. Your program should be authorized.
17. If it still is not generating an 8-11 digit number, there is a problem with your computer, operating system, or dongle, Contact On Center Software Technical Support at 866.689.5687, or you can contact via email at support@oncenter.com.




NOTE: There is a 30-day trial period on new licenses to allow for On Center Software's 30-day satisfaction guarantee. Once this 30-day period has elapsed, your license is updated to permanent status automatically via the Internet.

Authorizing Quick Bid

After installing Quick Bid, insert your dongle. Once the dongle is connected, you should not lose authorization as long as you keep the dongle plugged in and maintain a running Internet connection. If you remove the dongle while using the software, you will lose the license and will need to be reauthorized again via the Internet.

An internet connection is also important for the license validation process that occurs every 60 days to update your license. If your computer does not have Internet access or for other authorization issues, call On Center Software Technical Support at 866-689-5687.

NOTE: You will need your Client ID, provided by On Center Software, to authorize Quick Bid.

1. From the **File** menu, click **Check Authorization**.
2. If you enter an incorrect Client ID, or the field is blank, click  and enter the correct **Client ID**.
3. Click  to connect to the OCS Server.
4. Click  to close the **License Authorization** dialog after you are authorized.

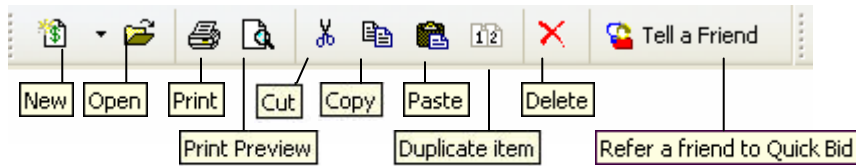
Section 3

Toolbars, Menus & Shortcuts

Toolbars

This page lists the two toolbars in Quick Bid. Hover your cursor over a toolbar icon in the open program. A tool tip will provide a brief description of the icon. Tool tips appear on the toolbars below for quick reference.

Main Toolbar



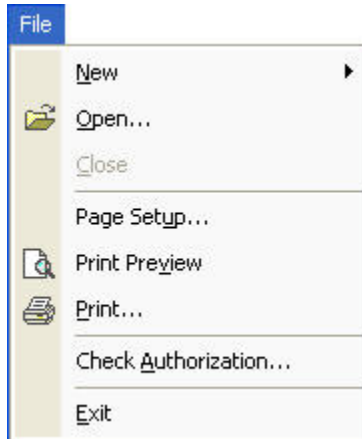
Bid Toolbar



Menus

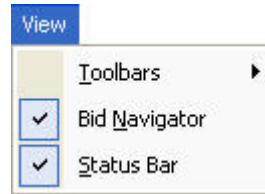
There are seven Quick Bid menus. Many of the menu commands also appear in toolbars.

File Menu



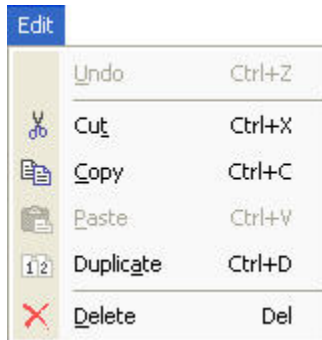
See [File Menu, in Program Help](#), for menu option descriptions

View Menu



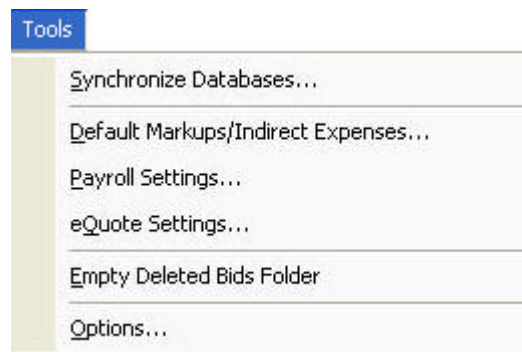
See [View Menu, in Program Help](#), for menu option descriptions

Edit Menu



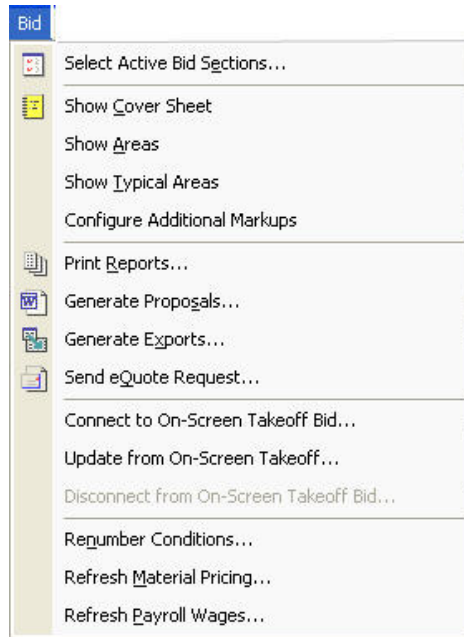
See [Edit Menu, in Program Help](#), for menu option descriptions

Tools Menu



See [Tools Menu, in Program Help](#), for menu option descriptions

Bid Menu



See *Bid Menu, in Program Help*, for menu option descriptions

Help Menu



See *Help Menu, in Program Help*, for menu option descriptions.

Master Menu



















See *Master Menu, in Program Help*, for menu option descriptions

NOTE: The items in the Master Menu are also referred to as Database tables or Master lists. Any changes you make to Master lists will affect all future uses of that list. Depending on your location in Quick Bid, making changes to items at the bid level will also allow you to change the Master lists.

Shortcuts

Toolbars, Function keys and Combination keys provide quick shortcuts to special features in the program.

	Icon	Function	Shortcut
Main Toolbar	New	 Creates new bid, condition, markup, etc. depending on focus	Ctrl + N
	Open	 Accesses Open Database dialog to open/close databases	Ctrl + O
	Print	 Prints a report depending on what tab you are viewing	Alt + F, P
	Print Preview	 Print Previews a report depending on what tab you are viewing	Alt + F, V
	Cut	 Removes selection and copies to clipboard	Ctrl + X
	Copy	 Copies selection to clipboard	Ctrl + C
	Paste	 Pastes copied or cut selections from the clipboard	Ctrl + V
	Duplicate	 Duplicates selected bid, condition, item, etc.	Ctrl + D
	Delete	 Deletes selected bid, condition, item, etc.	Delete key
	Tell a Friend	 Opens a web page allowing you to refer a friend to Quick Bid	
Bid Toolbar	Select Active Bid Section	 Opens the Select Active Bid Sections dialog	
	Cover Sheet	 Opens the bid Cover Sheet for the selected bid	
	Reports	 Opens Bid Reports dialog	
	Proposals	 Opens the Generate Proposal dialog	
	Exports	 Opens Bid Exports dialog	
	eQuote	 Sends a material quote request to Gypsum Supply Co. (only visible if eQuote settings are activated)	

Section 3 – Toolbars, Menus & Shortcuts

Function Keys	Access Help File	F1
	Edit current cell	F2
	Pull up Item Detail	F3
	Pull Lookup for current cell	F4
	Cycle Material and Labor	F5
Shortcuts	Recalculates Bid	Ctrl + Alt + R
	Saves Database as	Ctrl + S
	Cycle to previous condition	Ctrl + Page Up
	Cycle to next condition	Ctrl + Page Down
	Inserts new bid, condition, item, etc. depending on focus	Insert key
	Accept /Close current window	Ctrl + Enter
	Dismisses dialog and/or reverts data to last known state	Escape key
	Opens list if current cell has Lookup button	Spacebar

Section 4

Tabs, Dialogs & Measurements

Tabs

Quick Bid is designed with nine tabs that focus on different aspects of your bid. Each tab displays bid information for the bid highlighted in the Bid Navigator or selected from the Bids tab.




Under each tab are column headings. These headings can be easily moved within the header row by clicking and dragging. Each heading will also perform an ascending or descending sort by clicking the up or down arrow next to it. The details of each tab, including information about column headings, are outlined in this section.

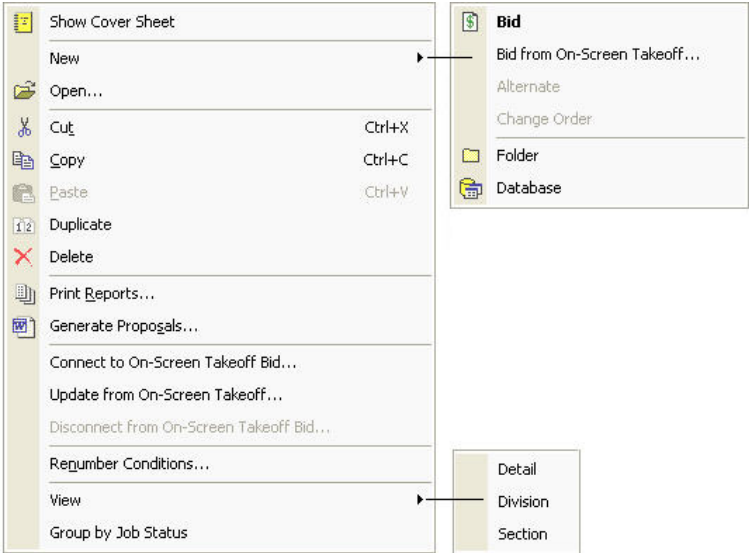
Bids Tab

The **Bids** tab displays a summary for each bid in the current database. To use the features present on the remaining tabs, you must first select a bid from the **Bids** tab.

Project Name		Primary Contact		Job Type		Estimator		
Project Name	Primary Contact	Job Type	Estimator	(All Job Types)	(All Estimators)			
Bid No.	Project Name	Status	Job ...	Primary Contact	Job Type	Est.	Date	Total
1	(Paint) Vantage ...	Pending			Warehouse	DE	10/23/1998	21,566
2	(Masonry) EIL...	Pending			School	GD	7/20/1999	473,381
3	(Roofing) Outlet ...	Pending			Mall	GD	7/20/1999	35,938
4	(Flooring) Multi...	Pending			Strip Center	GD	7/20/1999	39,807
5	(Interior) Arb...	Pending			Office Building	GD	7/20/1999	216,699
6	(Concrete) Sam...	Pending			Warehouse	GD	7/21/1999	66,445
7	Wall/Attic In...	Pending			Residential	GD	12/9/1999	3,819
8	(Residential) Fra...	Pending			Residential	GD	7/21/1999	94,923
9	Duct & Pipe Ins...	Pending			Hotel Hi-Rise	GD	3/13/2000	5,642
10	(Acoustical) Con...	Pending			Multi-Use Facility	GD	6/29/1999	27,212
11	EIFS/Plaster Pr...	Pending			Hospital	PO	10/28/2000	634,666
12	Drywall Hang	Pending			Office	JH	10/25/2000	7,879
13	Waterproofing In Pro...	Pending			School	GD	7/26/2000	20,610
16	Edwards Air ...	Pending	55				1/11/2006	0
17	Electrical - Sout...	Pending					11/4/2005	0
19	Sample - Edwar...	Pending					3/21/2006	0
20	Edwards Air ...	Pending	BR549				1/12/2006	167
21	Give your projec...	Pending	73024	B Radley	Assigne a Job T...	AAE	3/24/2006	0
Deleted Bids								

- To help you find bids quickly, there are four filter fields located directly below the main tabs: **Project Name**, **Primary Contact**, **Job Type** and **Estimator**.

- To filter by **Project Name** or **Primary Contact**, type the name in the respective field, and the bid list will sort based on your entry. To turn the filter off, click the delete button  next to that field.
NOTE: The Project Name filter will remain persistent between sessions.
- To filter by **Job Type** or **Estimator**, click the arrow in the field. Scroll to your selection and click on it. The bid list will sort based on your selection.
- Each column can be sorted by clicking the arrow in the column header.
- Right-clicking on a bid in the **Bids** tab brings up a menu that allows you to perform actions related to that bid.



NOTE: Double click on a bid; or select it, and press Enter from your keyboard to get to the **Conditions** tab for that bid.

Conditions Tab

The **Conditions** tab displays a summary for each condition in the current bid.

Bids								
Conditions								
Subs								
Equip								
Other								
Markups								
Materials								
Labor								
Payroll								
Section			Area			Type		
[All Sections]			[All Areas]			[All Types]		
✓ No. ▲	Name	Type	Area	Height	Quantity	Unit Cost	Total	
1	Ext CMU on War...	Latex	Warehouse	20' 0"	400 LF	0.66	5,244	
2	Multi condition Ro...	Latex	Floor 1	9' 0"	50 LF	6.67	334	
3	Alkyd Walls Rolled	Alkyd	(multi)		300 SF	0.68	204	
4	Type A Wall Vinyl	Latex	Floor 1	9' 0"	400 LF	1.10	3,958	
5	Paint door-3070	Doors	Floor 1		50 EA	79.52	3,976	
6	Paint Metal Pipe ...	Exterior	Floor 1		1,500 LF	2.39	3,591	
7	3 Coat System Lat...	Walls	Floor 1	9' 0"	100 LF	0.51	456	
8	Ext Siding Spraye...	Latex	(multi)		972 SF	1.14	1,112	
9	Paint labor with st...	Interior	Floor 1	9' 0"	500 LF	2.88	1,438	

- Use **Section**, **Area** or **Type** filter fields, located directly below the main tab, to sort.
 - Click the arrow in the filter field you want to sort by. Scroll to your selection, and click on it. The conditions list will sort based on your selection.
- Each column can be sorted by clicking the arrow in the column header.
- To group the conditions list by **Condition Type**, right-click anywhere in the **Conditions** tab window. Select **Group by Type** from the menu that appears.








- To open the **Condition Detail** for a particular condition, double-click on the condition, select a condition, and press **Enter** on your keyboard. You can also right-click on the condition, and select **Show Condition Detail**.
- To create a new condition, right-click anywhere in the window, and select **New Condition**. You can also hit **Insert** on your keyboard, or select **File > New > Condition** from the main menu.

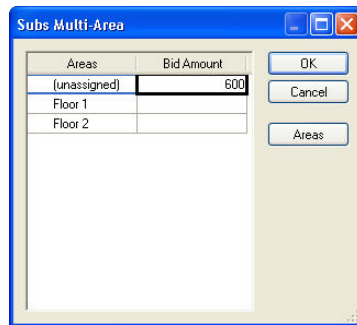
NOTE: See [Section 9, Conditions](#) for detailed information on creating conditions.



Subs Tab

The **Subs** tab allows you to enter and keep track of subcontractor bids.

Bids	Conditions	Subs	Equip	Other	Markups	Materials	Labor	Payroll			
✓	Section ▲	Subcontr...	Bid Amount	Escal	Multi	Area	MBE	WBE	Cost Code	Notes	Total
✓	2000	Stocking ...	0	0%	☐	(unassigned)	☐	☐	SUBCON...		0
✓	2000	Stocking ...	0	0%	☐	(unassigned)	☐	☐	SUBCON...		0
✓	7210	Bill Constr...	0	0%	☐	(unassigned)	☐	☐	SUBCON...		0
✓	7210	Murray Dr...	0	0%	☐	(unassigned)	☐	☐	SUBCON...		0
✓	7210	Murray Dr...	0	0%	☐	(unassigned)	☐	☐	SUBCON...		0

1. Right-click anywhere in the **Subs** tab window, and select **New Subs Bid** from the menu, or click the **Lookup** icon  in the **Subcontractor** column if there are no subs assigned yet, or Hit the **Insert** key on your keyboard.
2. Click on a sub from the **Contacts (Master)** dialog and click . You will return to the **Subs** tab window. See *Section 5, Master Menu Contacts* for information on how to add a sub to the database.
3. Once you have entered the **Subcontractor**, enter a **Section** if not already entered, or click the **Lookup** icon  to select from a list.
NOTE: Section numbers are based on The Construction Specifications Institute MasterFormat™ 2004 edition.
4. Enter the **Bid Amount**, if known, or use the **Subcontractor Bid Worksheet** to calculate the amount.
 - a. Click the spreadsheet icon  to go to the **Subcontractor Bid Worksheet**.
 - b. Click  to add a new line.
 - c. Enter all of your numbers, the total for all numbers you entered will appear in the lower right section of the dialog.
NOTE: Using the **Subcontractor Bid Worksheet** will only fill in the **Bid Amount** field. Other entries must be entered manually.
5. Enter an **Escalation** percentage if applicable, which will escalate the subcontractor bid total anywhere the total appears, such as in bid totals, bid reports, etc. See *Section 10, Bid Areas and Typical Areas* for more information.



6. Either check the **Multi** box to break the subcontractor's bid across multiple areas, or enter an **Area** to assign a single area.
 - If the Multi box is checked, the **Subs Multi-Area** dialog will appear. Enter the dollar value you want assigned to each area.
 - Leave the Multi Area box empty, and use the **Lookup** icon , in the **Area** column, to select from a list. This will assign the full amount to one area.
7. Check **MBE** or **WBE** for minority or woman owned businesses.
8. Enter a **Cost Code**, or click the **Lookup** icon  to select from a list.
9. Enter any **Notes** you may want to include.
10. Place a check in the **Check box** located to the left of the **Section** field. Checking here will accept the subcontractor bid into the bid total.
11. To resort the information in any a column, click the arrow in the column header.

NOTE: Right-clicking anywhere in the **Subs** tab brings up a menu that allows you to perform other actions. The bottom four selections in this menu allow you to customize the layout of the **Subs** tab.



Equip Tab

The **Equip** tab displays a summary for each piece of equipment or equipment assembly in the current bid.

Sect...	Equipment	Qty	Unit	Multi	Area	Equip Rate	Equip Total	Cost Code	Lab. Rate	Lab. Total	Lab. Cost Code	Payroll Class	Wage Type
	Tractor	1	week	<input type="checkbox"/>	(unassign...	2,500		TRACT...					

1. Right-click anywhere in the **Equip** tab window, and select **New Equip Entry** from the menu, or Press **Insert** on your keyboard, or
Select **File > New > Equipment** from **Main** menu
2. Enter a description of the equipment in the **Equipment** field, or right-click anywhere in the **Equip** tab window and select **Insert Equipment Assembly** from the menu. See [Section 9, Equipment Assemblies](#) for information on how to create and insert equipment assemblies into your bid.
3. Enter a **Section**, or click the **Lookup** icon  to select from a list.
4. Enter a **Qty** (quantity).
5. Enter a **Unit**, or click the **Lookup** icon .
12. Either check the **Multi** box to break equipment quantities across multiple areas, or uncheck and enter an **Area** to assign a single area.
 - If the Multi box is checked, the **Equip Multi-Area** dialog will appear. Enter the quantity you want assigned to each area.
 - Leave the Multi Area box empty, and use the **Lookup** icon , in the **Area** column, to select from a list. This will assign the full quantity to one area.
6. Enter the **Equip Rate**. The **Equip Total** field will auto-populate by multiplying the **Qty** and **Equip Rate** fields.
7. Enter a **Cost Code**, or click the **Lookup** icon .
8. Enter the **Lab. Rate (labor rate)**. The **Lab. Total (labor total)** field will auto populate by multiplying the **Qty** and **Lab. Rate** fields.
9. Enter a **Lab. Cost Code (labor cost code)**, or click the **Lookup** icon .
10. Enter a **Payroll Class**, or click the **Lookup** icon .

Section 4 – Tabs, Dialogs & Measurements




11. Enter a **Wage Type**, or click the **arrow** to select from a list. If no wage types are entered, type in a description and you will be prompted to add it.
12. Each column can be resorted by clicking the arrow in the column header.




NOTE: Right-clicking anywhere in the **Equip** tab brings up a menu that allows you to perform actions related to the equipment in the current bid.

Other Tab

The **Other** tab allows you to include additional costs, either direct or indirect, that are not covered elsewhere in the bid. You can enter any miscellaneous labor or material expense. You can also save a group of other costs as an **Other Assembly**, or create general conditions that are specific to the current job only.

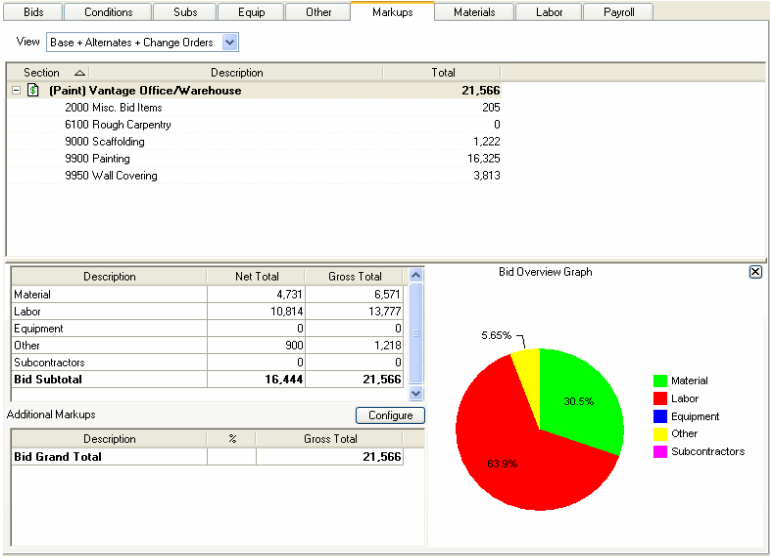
Bids	Conditions	Subs	Equip	Other	Markups	Materials	Labor	Payroll					
Sect...	Other	Qty	Unit	Multi	Area	Other Rate	Other Total	Cost Code	Lab. Rate	Lab. Total	Lab. Cost Code	Payroll Class	Wage
2000	Concrete pump	4	Hours	<input type="checkbox"/>	(unassign...	225	900	CONCR...					

1. Right-click anywhere in the **Other** tab window, and select **New Other Entry** from the menu, or Press **Insert** on your keyboard, or Select **File > New > Other** from the **Main** menu.
2. Enter a description in the **Other** field, or right-click anywhere in the **Other** tab window and select **Insert Other Assembly** from the menu. See [Section 9, Other Assemblies](#) for information on how to create and insert assemblies into your bid.
3. Once you have entered the **Other** item, enter a **Section** or click the **Lookup** icon  to select from a list.
4. Enter a **Qty** (quantity).
5. Enter a **Unit**, or click the **Lookup** icon  to select from a list.
13. Either check the **Multi** box to break other quantities across multiple areas, or uncheck and enter an **Area** to assign a single area.
 - If the **Multi** box is checked, the **Other Multi-Area** dialog will appear. Enter the quantity you want assigned to each area.
 - Leave the Multi Area box empty, and use the **Lookup** icon , in the **Area** column, to select from a list. This will assign the full quantity to one area.

6. Enter the **Other Rate**. The **Other Total** field will auto populate by multiplying the **Qty** and **Other Rate** fields.
7. Enter a **Cost Code**, or click the **Lookup** icon  to select from a list.
8. Enter the **Lab. Rate (labor rate)**. The **Lab. Total (labor total)** field will auto populate by multiplying the **Qty** and **Lab. Rate** fields.
9. Enter a **Lab. Cost Code (labor cost code)**, or click the **Lookup** icon  to select from a list.
10. Enter a **Payroll Class**, or click the **Lookup** icon  to select from a list.
11. Enter a **Wage Type**, or click the arrow to select from a list. If no wage types are entered, type in a description and you will be prompted to add it.
12. Each column can be resorted by clicking the arrow in the column header.

Markups Tab

The **Markups** tab displays a list of all bid sections used in the current bid. Each section has its own markups and other attributes that affect its total.



Section	Description	Total
(Paint) Vantage Office/Warehouse		21,566
2000 Misc. Bid Items		205
6100 Rough Carpentry		0
9000 Scaffolding		1,222
9900 Painting		16,325
9950 Wall Covering		3,813

Description	Net Total	Gross Total
Material	4,731	6,571
Labor	10,814	13,777
Equipment	0	0
Other	900	1,218
Subcontractors	0	0
Bid Subtotal	16,444	21,566

Description	%	Gross Total
Bid Grand Total		21,566

Bid Overview Graph

- Material: 30.9%
- Labor: 63.9%
- Other: 5.65%
- Equipment: 0%
- Subcontractors: 0%

Section 4 – Tabs, Dialogs & Measurements

Adjustments can be made on the **Markup Detail** dialog to **Stock, Cleanup, Supervision, Escalation, Tax, Per Diem, Overhead and Profit.**

1. Highlight the section, right-click and select **Show Markup Detail**, or
Highlight the section, and press **Enter** on your keyboard, or
Double click the section.
2. The **Markup Detail** dialog for that section will appear, and you can adjust your markups.
NOTE: See *Section 9, Markups* for in-depth information about adding and modifying **Markup Details**.
3. Add additional sections by pressing **Insert** on your keyboard. See *Section 5, Master Menu Divisions/Sections* for information on adding sections.

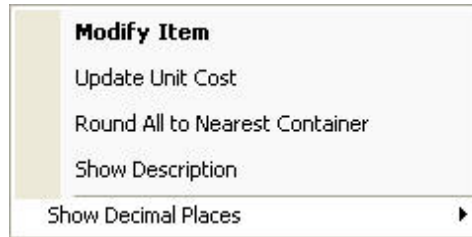
Materials Tab

The **Materials** tab displays a list of all materials used in the current bid.

Bids												
Conditions		Subs		Equip		Other		Markups		Materials		
Section			Area			Cost Code			Type			
[All Sections]			[All Areas]			[All Cost Codes]			[All Types]			<input type="checkbox"/> View conditions in use
Item Code	Cost Code	Size/Style	Quantity	UOM	Mat. Price	Per	Total	Wast...	Units	U/Size	Price Updated	
1	6X6WM	CONCRETE 3' x 15'	10,000	SF	78.00	rolls	1,733	0%	22.22	rolls	10/23/2000	
2	CONCRETE	CONCRETE	209	EA	58.00	CY	12,114		208.87	CY	10/23/2000	
3	CURE	CONCRETE 1' x 1'	13,000	SF	0.50	1 SF	6,500	0%	260.00	gallon	10/23/2000	
4	DwL1218	CONCRETE	200	EA	21.00	bundles	84	0%	4.00	bundl...	10/23/2000	
5	FMSTK	CONCRETE	400	EA	2.15	piece	860	0%	400.00	each	10/23/2000	
6	KEY04	CONCRETE 10'	200	LF	0.31	1 LF	62	10%	20.00	pieces	10/23/2000	
7	REBAR03	CONCRETE 20'	8,400	LF	65.00	1,000 LF	546	5%	420.00	pieces	10/23/2000	
8	STP031212	CONCRETE	600	EA	0.50	1 EA	300	0%	600.00	pieces	10/23/2000	
9	04REBAR	REINFORCE 0"	2,400	LF	20.00	100 LF	480		7.31...	piece	10/23/2000	
10	14RWEXP	WOOD 8'	200	LF	2.00	piece	50	10%	25.00	pieces	10/23/2000	
11	26SF2	WOOD 12'	275	LF	8.00	piece	183	0%	22.92	pieces	10/23/2000	

- Use the **Section, Area, Cost Code** and **Type** filter fields, located directly below the main tab, to help sort.
- Check in the **View conditions in use** box to display a list of all conditions in which the selected item appears. The list will appear at the bottom of your screen.
- Clicking a column header will sort by that items according to that heading.

- Adjust material item details directly in the material list via the function menu. Access the function menu by right-clicking in any cell. The menu will appear.



- **Modify Item** will take you to the **Item Detail** to make changes.
- **Update Unit Cost** allows you to change the unit cost by a percentage for all filtered items.
- The **Round all to Nearest Container** command will round up all the materials on this list to the closest whole container for each by adjusting the waste factor.

NOTE: This can be helpful in accurately estimating the true cost of materials in a job. You may filter the list to specific areas and round up quantities on each floor, phase, unit, etc. Rounding up or down will change your selling price because the quantities and subsequent cost are being modified. If you are locked into a contract price, you can still round up quantities before you buyout the job. However, your selling price will be affected by the changes, so once the changes are made, return to the Markups tab and reset your selling price to the contract value. If you are rounding up, your profit percentage will be reduced by the added cost from rounding up.

NOTE: This command cannot be undone.

- **Show Description** will either enable or hide the **Description** column in the material list.
- **Show Decimal Places** function is only available by right-clicking in a cell with a number.

Labor Tab

The **Labor** tab summarizes labor charged to each Cost Code at a specific production rate. It displays a list of all **Cost Codes** used in the current bid. These Cost Codes are account codes that track line items of labor generated from all tabs.

Section 4 – Tabs, Dialogs & Measurements

Bids									
Conditions									
Subs									
Equip									
Other									
Markups									
Materials									
Labor									
Payroll									
Section		Area		Cost Code		Condition Type			
(All Sections)		(All Areas)		(All Cost Codes)		(All Condition Type)			
<input type="checkbox"/> View conditions in use									
Labor Adjust									
	Cost Code	Quantity	UOM	Qty/Hr	Cost	Total Cost	Wage Type		
1	CAST	13,000	SF	103	0.75	9,750.00	Union		
2	CAST	600	LF	103	0.58	350.65	Open		
3	CURE	13,000	SF	800	0.02	227.50	Union		
4	FORM	275	LF	54	0.42	115.09	Union		
5	FORMWDRK	200	LF	60	0.38	75.33	Union		
6	LAYOUT	10,000	SF	313	0.04	384.00	Open		
7	LAYOUT	3,000	LF	50	0.37	1,098.00	Union		
8	REBAR	10,000	SF	250	0.13	1,260.00	Open		
9	REBAR	8,000	LF	81	0.39	3,101.54	Open		
10	REBAR	600	EA	20	1.58	945.00	Open		

- Use the **Section**, **Area**, **Cost Code** and **Condition Type** filter fields located directly below the main tab to help sort.
- Each column can be sorted by clicking the column header.
- Place a check in the **View conditions in use** box to display a list of all conditions in which the selected cost code appears.
- Use the **Labor Adjust** button to modify time, days and cost for each item.
- Adjust **Cost Code**, **Qty/Day**, **Cost** and **Wage Type** for each labor detail by typing changes directly in the cell.
- Adjust labor details for either entire list or filtered list through the function menu. Right-click in any cell to display the function.

View as Qty/Day
Update Unit Cost
Change Wage Type
Labor Adjust
Break Labor on Height
Show Description
Show Decimal Places ▶

NOTE: See *Tabs, Labor Tab, in the Program Help* system for a detailed explanation about rounding and adjusting labor production.

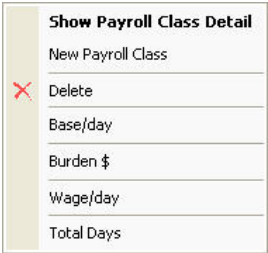
WARNING: Changes made on the **Labor** tab are immediate and permanent.

Payroll Tab

The **Payroll** tab displays a list of all **Payroll Classes** used or created for the current bid. The information contained on the **Payroll** tab, and any changes made on the Payroll tab are specific to the current bid only.

Bids	Conditions	Subs	Equip	Other	Markups	Materials	Labor	Payroll
Section		Area		Cost Code		Condition Type		
[All Sections] ▾		[All Areas] ▾		[All Cost Codes] ▾		[All Condition Type] ▾ <input type="checkbox"/> View conditions in use		
Payroll Class	△	Wage Type	Base/hr	Burden %	Wage/hr	Total Hours	Per Diem	Total
Brick Layer		Union	18.30	76.47%	32.29	60	0.00	1,937.67
Carpenter		Union	22.60	62.21%	36.66	8.43	0.00	308.89
Concrete Finisher		Union	17.50	70.71%	29.88	253.25	0.00	7,565.75
Concrete Finisher		Open	15.00	35%	20.25	11.69	0.00	236.69
Concrete Laborer		Union	14.00	60.36%	22.45	396.12	0.00	8,892.90
Concrete Laborer		Open	10.00	30%	13.00	17.53	0.00	227.92
Drywall Frammer		Open	12.00	35%	16.20	32	0.00	518.40
Ironworker		Open	15.75	35%	21.26	336.92	0.00	7,163.83

- Use the **Section**, **Area**, **Cost Code** and **Condition Type** filter fields, located directly below the main tab to help sort.
- Place a check in the **View conditions in use** box to display a list of all conditions in which the selected item appears. It will be displayed at the bottom of your screen.
- Adjust **Payroll Class** details by double-clicking on an item or selecting an item and pressing **Enter** on your keyboard. The **Payroll Class Detail** dialog will appear, and you can make adjustments.
- To access the **function menu**, right-click in any cell. The menu will appear.



- Change **Base/hr** to **Base/day**, **Burden \$** to **Burden %**, **Wage/hr** to **Wage/day**, **Total Hours** to **Total Days**. Right click within that particular column and select the appropriate change.

NOTE: The actual menu **does not** appear as shown. The last four selections are specific to their respective column headers. For example, the **Burden \$** function will appear only if you right-click in the **Burden %** column.

Dialog Boxes

Dialog boxes come in many forms in Quick Bid. Every piece of information you enter in Quick Bid will be entered in a dialog box. The Condition Detail (shown below) is an example of a dialog box.

Condition Detail

Cond No: 4

Name: Type A wall Vinyl

Type: Latex

Area: Floor 1

Quantity 1: 400 LF

Quantity 2: 0 EA

Quantity 3: 0 EA

Height: 9' 0"

Sect	Mat	Lab	Unit	Total
9900	0.09	0.00	0.09	916
9950	0.85	0.16	1.01	3,651
Total	0.94	0.16	1.10	3,967



Notes: Wallcovering condition. Material is calculated in LY and allows for the 54" roll cost with 50" of goods installed.

Sect	Item	Lab Code	Height	DC	Layers	Qty	UOM	Size	Mat Price	Per	Lab Cost	Wage Type	Crew	Base	Qty/Hr	Pcs/Hr	Crew Hrs	Mat Total	Lab Total
1	9900 LATEX		9' 0"		1.00	3,600	SF	1' x 1'	12.00	gallons								144	
2	9950 SMOCKSTILE	HANS Vw/C	9' 0"	50"	1.00	298	LY	3'	7.26	LY	1,604	Open	1	40%	5	8.75	32.91	2,091	461
3	9950 CLAYBASE		9' 0"		1.00	3,600	SF	1' x 1'	5.00	gallons								150	
4	9900 BLADES					13	EA		6.96	1 EA								90	

Buttons: Modify Item, Assembly, Labor Adjust, Print, Previous, Next, Verified, Close

Many dialog boxes contain list fields. These fields pull from the lists you created in the Master menus. They are usually accompanied by type ahead, drop down, lookup and add in features.

Job Status: Pending

- **Type ahead** - Once you type the first letters the program will enter a corresponding alpha or numeric entry from the list.
- **Drop down** - Clicking on the  button, will reveal the list for that field. You can then select an item from the list by highlighting it and clicking.
- **Lookup** - Clicking the  icon will display the appropriate Master menu list dialog for that field.
- **Add in** - Typing in something new will trigger a dialog asking if you would like to add it to the list. Clicking **Yes** will open the list dialog.

Units of Measurement (UOM)

Quick Bid can accommodate both Imperial and Système International (SI)-metric in the United States-UOMs. When you create a database, you choose which system of measurement to use. All UOM boxes in the database will be based on the system of measurement you choose.

The UOM is the base measurement used to define quantities throughout the database tables including Bid Reports. The UOM also controls the options available at the Calculation, Sizing and Pricing tabs, and dictates the data required for the calculations. The UOM is a tag that always accompanies a quantity. If you are building a material record, the UOM will generally correspond with the UOM quoted by your supplier.

An Item record can only hold a single UOM, therefore once you set the UOM to define material quantities, all labor values will carry the same UOM. For example, you may price wall covering by the LY, so the UOM would be set to LY. If labor is attached to the same record, you must price the labor by LY. If you prefer labor priced by the SF rather than LY, you must build a separate Labor only record using SF as the UOM.

<i>Imperial UOMs</i>		<i>Metric/Système International (SI) UOMs</i>	
EA	Each	EA	Each
IN	Inches	mm	Millimeters
LF	Linear-Feet	mm ²	Square-Millimeters
LY	Linear-Yards	m	Meters
IN ²	Square-Inches	m ²	Square-Meters
SF	Square-Feet	mm ³	Cubic-Millimeters
SY	Square-Yards	m ³	Cubic-Meters
SQ	Square (Roofing)		
CF	Cubic-Feet		
CY	Cubic-Yards		

NOTE: When entering in height, the last two digits that you type will always calculate inches and will always convert to feet. For example: 824 will be 10' 0", 10 will be 10" and 1010 will be 10' 10". If using the metric system, all measurements are entered and stored as millimeters.

Section 5

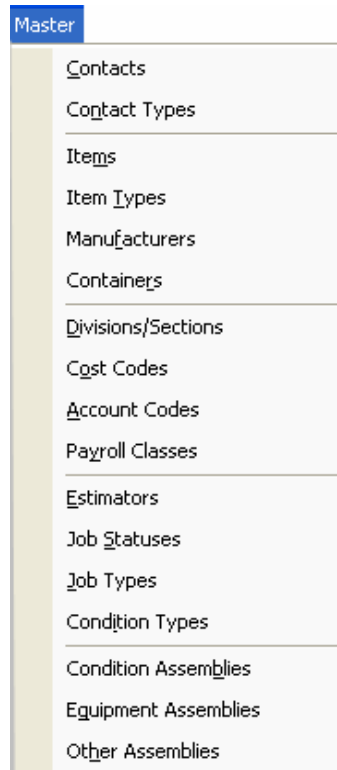
Master Menu Lists

Master Menu Lists

The **Master** menu allows you to access and configure lists that are stored on the database. Anything modified at the master / database level will affect all future bids. Master list dialogs are labeled (**Master**) to indicate that they are database level lists. It is important to pay close attention to any modifications you make in these dialogs.

Changing an existing record at the Master level will affect all future jobs, but will never affect a job previously entered. You may delete an existing record from the Master Items List even if that record has been used in a job. However, you cannot delete a record if it is currently in use in an assembly or if it is used as part of a chain or mixture.

NOTE: Changes you make at the Master level are immediate and permanent. Proceed with caution when deleting from one of the **Master** menu lists. It will delete the information from the database. This deletion cannot be undone.

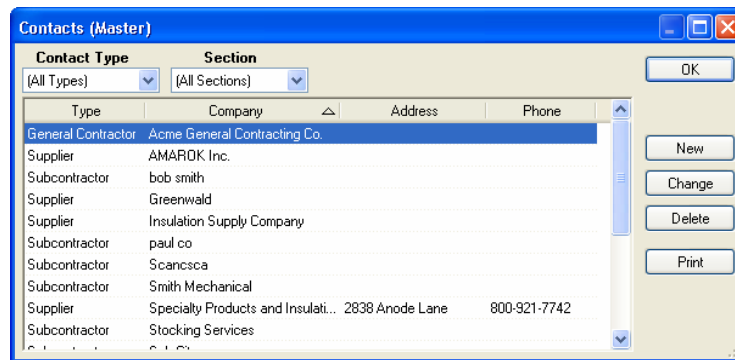


Master Menu Contacts

Before you begin working in a database, it is helpful to input all of the companies with whom you do business. Contacts can be your company, subcontractors, architects, engineers, clients, etc. Depending on your business practices, you can enter company information, contacts for those companies, company AEC (Architectural, Engineering, Construction) information and notes about a company.

NOTE: It is important that you set up your own company in the contacts list. You will most likely be using it as the default bidding company. The default bidding company appears on the Cover Sheet of each new bid and on all bid reports.

1. From the **Master** menu, click **Contacts**. The **Contacts (Master)** dialog appears.





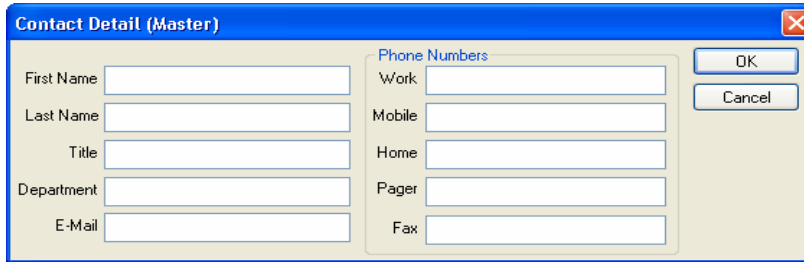
2. Click . The **Company Detail (Master)** dialog appears.

Type: General Contractor
 Company: Sample Project Company
 Address 1: 1452 Broadway
 Address 2: Suite 54
 City: Houston
 State: TX Zip: 77056
 Country:
 Phone: 713-257-3289
 Fax: 713-257-3288
 Web Site: www.sampleco.com
 Use on Cover Sheet as a Bidding Company

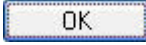
Name	Title	Telephone	E-mail

Section 5 – Master Menu Lists

3. Enter a contact type in the **Type** field or click the **Lookup** icon  to select from a list.
4. Enter in the contact's information in the fields provided.
5. Place a check in the box next to **Use on Cover Sheet as a Bidding Company** if you want this to be the default bidding company.
6. To keep a record of important individuals who work for each of your company contacts, click the **Contacts** tab. Click . The **Contact Detail (Master)** dialog appears.

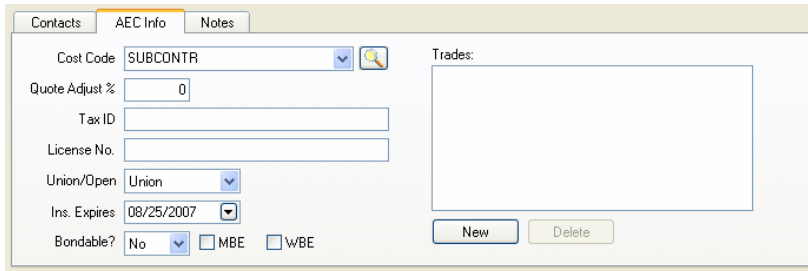


The **Contact Detail (Master)** dialog box is shown. It has a blue title bar with a close button. The dialog is divided into two main sections. The left section contains text input fields for: First Name, Last Name, Title, Department, and E-Mail. The right section is titled "Phone Numbers" and contains text input fields for: Work, Mobile, Home, Pager, and Fax. At the bottom right of the dialog are two buttons: "OK" and "Cancel".

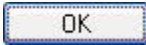
Enter the contact's information and click  to return to the **Company Detail (Master)** dialog.

NOTE: You can enter multiple contacts for a single company.

7. To include more detailed information about a company. Click the **AEC Info** tab, and input information you want included.



The **AEC Info** tab of the dialog box is shown. It has three tabs: "Contacts", "AEC Info", and "Notes". The "AEC Info" tab is selected. The dialog contains several input fields and checkboxes. On the left side, there are: a dropdown menu for "Cost Code" (set to "SUBCONTR"), a text input for "Quote Adjust %" (set to "0"), a text input for "Tax ID", a text input for "License No.", a dropdown menu for "Union/Open" (set to "Union"), a dropdown menu for "Ins. Expires" (set to "08/25/2007"), and a "Bondable?" section with a dropdown menu (set to "No") and two checkboxes: "MBE" and "WBE". On the right side, there is a large empty text area labeled "Trades:". At the bottom right are two buttons: "New" and "Delete".



8. To document additional notes about the company, click the **Notes** tab. Type your notes directly into the space provided.
9. After all information is entered, click  to return to the **Contacts (Master)** dialog.

Master Menu Contact Types

Creating a list of Contact Types allows you to group contacts that share a commonality that would be beneficial for a future sort.

1. To create a new contact type, from the **Master** menu, click **Contact Types**. The **Contact Types (Master)** dialog appears.



2. Click . A blank line will appear.
3. Enter the name of the new Contact Type and click .

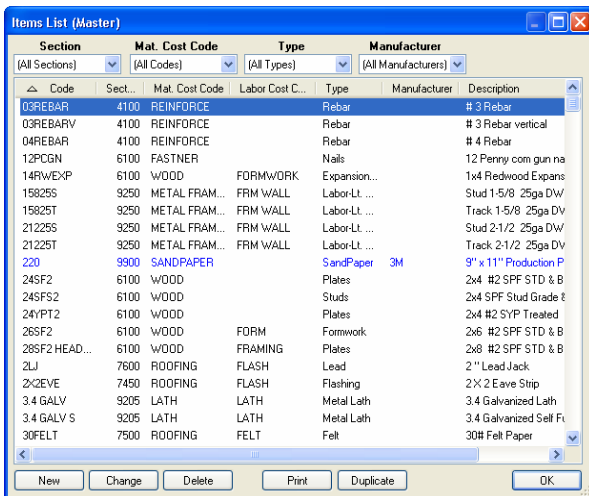
NOTE: New Contact Types can also be added on the bid Cover Sheet. Once you have entered a Company in the Project Contacts field, click in the Type field. The Contact Types List (Master) dialog will appear. When you create a new contact type here, it is saved at the Database or Master level and can be used in other bids.

Master Menu Items

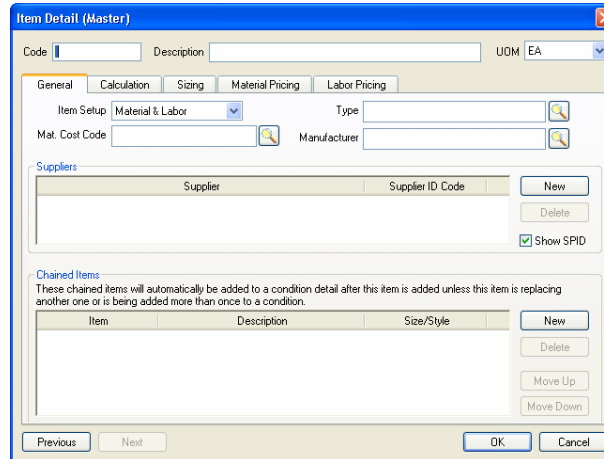
The **Items List (Master)** contains all of the items you need for your bid. An Item is anything related to labor or material in a particular database. The Master Items List consists of all the items cost codes, labor codes and material codes needed for a job.

The **Items List (Master)** is for reference only. You can create a new, modify or delete an item by selecting it in this list. Creating new items or modifying items is done on the **Item Detail (Master)** dialog.

Section 5 – Master Menu Lists



Section	Mat. Cost Code	Type	Manufacturer			
(All Sections)	(All Codes)	(All Types)	(All Manufacturers)			
Code	Sect.	Mat. Cost Code	Labor Cost C...	Type	Manufacturer	Description
03REBAR	4100	REINFORCE		Rebar		# 3 Rebar
03REBARV	4100	REINFORCE		Rebar		# 3 Rebar vertical
04REBAR	4100	REINFORCE		Rebar		# 4 Rebar
12PCGN	6100	FASTNER		Nails		12 Penny com gun na
14RWEXP	6100	WOOD	FORMWDRK	Expansion...		1x4 Redwood Expans
15825S	9250	METAL FRAM...	FRM WALL	Labor-Lt ...		Stud 1-5/8 25ga DW
15825T	9250	METAL FRAM...	FRM WALL	Labor-Lt ...		Track 1-5/8 25ga DV
21225S	9250	METAL FRAM...	FRM WALL	Labor-Lt ...		Stud 2-1/2 25ga DW
21225T	9250	METAL FRAM...	FRM WALL	Labor-Lt ...		Track 2-1/2 25ga DV
220	9900	SANDPAPER		SandPaper	3M	9" x 11" Production P
245F2	6100	WOOD		Plates		2x4 #2 SPF STD & B
245FS2	6100	WOOD		Studs		2x4 SPF Stud Grade t
24YPT2	6100	WOOD		Plates		2x4 #2 SYP Treated
265F2	6100	WOOD	FORM	Formwork		2x6 #2 SPF STD & B
285F2 HEAD...	6100	WOOD	FRAMING	Plates		2x8 #2 SPF STD & B
2LJ	7600	ROOFING	FLASH	Lead		2" Lead Jack
2X2EVE	7450	ROOFING	FLASH	Flashing		2 X 2 Eave Strip
3.4 GALV	9205	LATH	LATH	Metal Lath		3.4 Galvanized Lath
3.4 GALV S	9205	LATH	LATH	Metal Lath		3.4 Galvanized Self Ft
30FELT	7500	ROOFING	FELT	Felt		30H Felt Paper



Item Detail (Master)

Code: [] Description: [] UOM: EA EA

General Calculation Sizing Material Pricing Labor Pricing

Item Setup: Material & Labor Type: []

Mat. Cost Code: [] Manufacturer: []

Suppliers

Supplier	Supplier ID Code
----------	------------------

Chained Items

These chained items will automatically be added to a condition detail after this item is added unless this item is replacing another one or is being added more than once to a condition.

Item	Description	Size/Style
------	-------------	------------

The **Item Detail (Master)** dialog is presented in six basic parts: the header which describes the Item and five tabs which give you access to Tables that hold default information for cost codes, quantity calculations, sizing and pricing information.

Header Fields

- **Code** field allows you to easily identify your item by using an abbreviated description of the item. For example, 8" Truss Type can be coded TT08. The abbreviations should be unique for each item in the database.
- **Description** field allows you to add a detailed description of the item for reference.
- **UOM** field allows you to choose how the item will be measured. Click the drop down arrow for a list of measurements. See [Section 4, Units of Measurement](#) for more information on the choices available.

General Tab

- **Item Setup** - Choose what you are setting up; either material, labor or both.
- **Mat. Cost Code** - Assign a material cost code to the item. Type one in, or use the **Lookup** button to select from the **Cost Code List (Master)**. This is a required field for items with a material part.
- **Type** - Assign an Item Type. Enter a new Type or use the **Lookup** button to select from the **Items Types (Master)**. This is an optional field.
- **Manufacturer** - Type in a new Manufacturer or use the **Lookup** button to select from the **Material Manufacturers (Master)**. This is an optional field and only available if setting up a material item.

- **Suppliers** - Assign a supplier by clicking the **New** button. Type in or use the **Lookup** button to pick from the **Contacts (Master)** list. Checking the **Show SPID** box will display the **Supplier ID Code**. By default the ID Code is the **Item Code**.
- **Chained Items** - Select items to be chained to this item. Click the **New** button, and use the **Lookup** button in the **Item** field to select from the **Items List (Master)**. See [Section 10, Chained Items](#), for more information. In **Size / Style** cell you can choose possible size or style for the chained item or it will auto-size default to the default selection. QB automatically chooses appropriate size\style based on detail height. This cell is enabled only for items with determined size or style.

Calculation Tab

The **Calculation** tab is used to set the parameters for calculating an item's quantity. It identifies and sets aspects of the Item that affect project calculations.

- **Calculation Method**
 - **Use Condition** - Determine which condition quantity will be used to calculate the detail quantity. Quantity 1 is selected by default. Use the drop down arrow to change the selection.
 - **Method to use** - Select a method of calculation
 - **Standard Formula** - Calculates the item quantity by factoring the condition quantity by height, width, depth, OC, layers and waste.
 - **Enter Direct Quantity** - Drops the item into the condition with a zero quantity and allows you to enter the quantity manually.
 - **Default to Condition Quantity** - Causes the item quantity to be the same as the Condition Detail's quantity.

Section 5 – Master Menu Lists

- **Quantity * Height** - Calculates the item quantity by factoring the condition quantity by height, OC, layers and waste. (Multiplies item quantity by the height.)
 - **Waste %** - Item quantities calculated by the standard formula or quantity*height may be modified by specifying a waste percentage.
 - **Formula Descriptions** - This area displays the mathematical formulas used to calculate the item quantity.
 - **Condition Detail Default Entries** - These entries are defaults for a condition detail.
 - **Section** - An entry to assign a CSI section number most commonly associated with this Item. It is a mandatory field that holds unique markup information and indirect costs.
 - **Lab. Cost Code** - An entry to assign a Cost Code that represents labor. This is a required field for items with a labor part.
 - **Height** - An entry to setup a default height for the Item (Leaving it set to zero will allow the Item to use the Condition Detail's height)
 - **Repeat every** - An entry to set the recurrence of a count object along a vertical line based on height.
 - **On Center (OC)** - An entry field to store information for the On Centers (OC) of material that repeat at fixed intervals. The installation method selected shall determine which default field (Height or OC) is available for calculating the material. Continuous Items do not have On Centers.
 - **Rows/Layers** - An entry to choose the default number of rows or layers needed to build this Item
 - **Installation Method**
 - **Horizontal** - This method ignores height in the formula when a quantity is calculated. When selected, the Condition Detail quantity is divided by the OC default and that result is factored by the layers. If the quantity is to result in either a liner or each UOM, then Horizontal should be selected
 - **Continuous** - This method ignores OC when a quantity is calculated. When Continuous is applied, the Condition Detail quantity is multiplied by the height and that result is factored by the layers. If the quantity is to result in a square UOM, then Continuous should be selected.
- NOTE:** Selecting both Horizontal and Continuous turns off both Height and OC in the formula. When applied, the Condition Detail quantity is multiplied by the layers default. If the Item quantity is to result in a liner or each value, both Horizontal and Continuous can be selected.
- **On Center Exception Factors** - These entries switch the standard formula to the OC exception formula.

- **At 16" OC** - The waste applied to a calculated quantity can be controlled by exception factors. You may enter different percentages for each OC default setting whereas the Waste % field applies the same percentage to all OC settings. The Exception factor is expressed as decimal value and if applied, the Exception factor will override the Waste%. This field applies to 16" OC values. This is an optional entry.
- **At 24" OC** - You can type in a waste percentage to add to this on-center value. This is an optional entry.

Sizing Tab

The **Sizing** tab is used to convert quantities into usable sizes or combine quantities into standard containers.

Length	Units/Per	Container	Product Number	Weight
20' 0"	1	piece		0

- **Size Method**
 - **Sizes** - Use this option to setup the most common sizes available for this Item. Remember, it is not necessary to enter every possible size for the item, only the most common sizes. Special sizes may be entered directly at the Condition Detail by clicking the size dropdown menu and selecting NEW.
 - **Styles** - This option allows you to enter a different price for each style name. Entering a material by Style works well for materials that have a single size but come in a variety of grades. For example, a door unit that is available in paint grade, stain grade, oak, birch or any other wood.
 - **Styles with Size** - Use this option to enter a different price for each size/style name.
 - **No Sizes** - Use this option if size does not pertain to this item.
 - **Mixture** - This allows you to enter specific material quantities for a combination of materials required for a given coverage or yield. It also allows you to combine a group of material items into a single line entry in a Condition Detail where labor will apply to the mixture. For

Section 5 – Master Menu Lists

example, our Item Code TF-4 (Tape & Float Level 4) is a mixture of two other material Items: Tape-250 and Mud4. These materials are listed below the Yield of 1,000SF.

- **Container** - Allows you to choose a description that represents what unit the item is priced by.
- **Mixture Yield** - This is a hypothetical value that allows Quick Bid to calculate the quantity of materials required in a mixture.
- **Grid Area** - Enter the appropriate sizing information for Sizes, Styles and Styles with Sizes. For Mixtures, assign a coverage yield or quantity and Item Code.

Material Pricing Tab

Item Detail for [21] 10/56

Code: A7526 Description: /Arm A755 Miniboard Fboard 5/8" SE UOM: SF

General Calculation Sizing **Material Pricing** Labor Pricing

Material Price Method: UOM

Price Per	Units	Price	Changed
1000	SF	235.000	10/23/2000

Previous Next OK Cancel

- **Material Price Method**
 - **UOM** - Use this option to price the item every 1, 100 or 1000 units of measure.
 - **Style** - Use this option to set up a specific price for each style. Styles must be entered at the Sizing tab in order to price style.
 - **Piece** - Use this option to set up a specific price for each size of this item.
 - **Container** - Use this option to set a price for the container the item is sold by.

Labor Pricing Tab

The **Labor Pricing** tab is used to set how the program calculates labor in the bid.

- **Labor Price Method**
 - **UOM** - Use this option to control the labor production units (linear, square, each, etc.) by the UOM selected for the Item record (upper right corner)
 - **Style** - Use this option to set up production per day, hour and labor cost for each different style of this Item
 - **Piece** - Use this option to set up production per day, hour and labor cost for each different size of this Item
 - **Container** - Use this option to set up production per day, hour and labor cost for each different container the Item is priced by
- **Default Wage Type** - Choose the default wage type for the pay class if it is different from the Global default wage type

Duplicate and Modify an Existing Item

When adding new material and labor Items to your Master list, you may duplicate an existing record then modify it or construct the Item Detail from scratch. To duplicate an Item at the Master Items List, select the Item you want to duplicate.


1. Click the **Duplicate** button, Right click and select Duplicate Item, or press **Ctrl D** from the keyboard.
2. An exact copy of the original will be automatically duplicated into the **Items List (Master)**. Since each record must have a unique code, the Item Code will be slightly altered with an underscore mark and the number 1 added to the original code (PR becomes PR_1 when duplicated).
3. Change the **Item Code**.

Section 5 – Master Menu Lists

4. Modify the **Description** (name) of the item.
5. Enter a current **Price** for the new item.

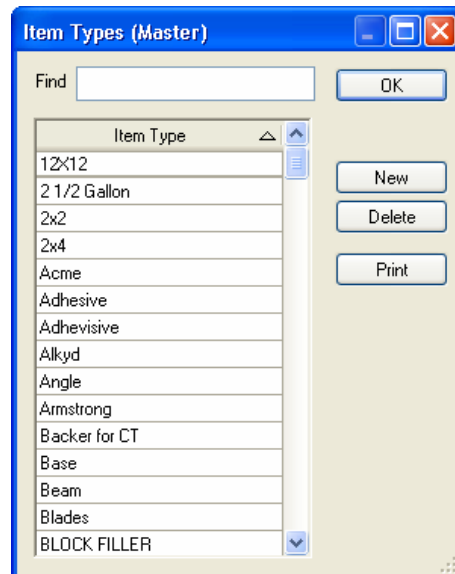
Adding New Items

Occasionally you will need to add a new material or labor item that is unlike any other existing record.




1. From the **Main** menu, select **Master > Items**. The **Items List (Master)** dialog will appear.
2. Click . A blank new **Item Detail (Master)** will be displayed.
3. Fill out the header field and each tab. See *Master Menu Items, Item Detail (Master) Dialog, in this section*, for details about these fields and tabs.

Master Menu Item Types

The master list of **Item Types** stores all the types of items you can create. Item Types are a basic description or categorization of an item.

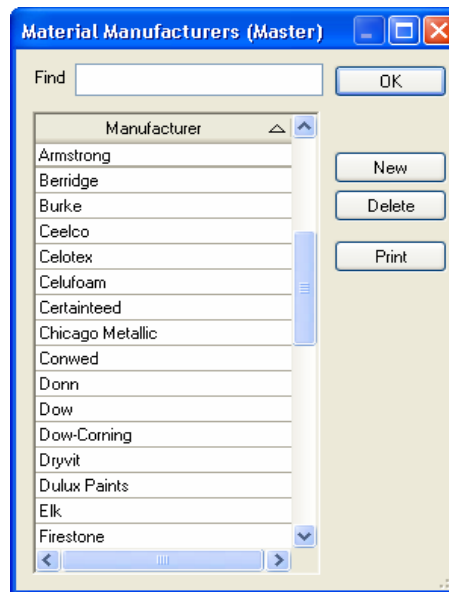




1. To create a new **Item Type**, from the **Master** menu, click **Item Types**. The **Item Types (Master)** dialog appears.

2. Click . A blank line will appear.
3. Enter the name of the new **Item Type** and click .
4. To change the **Item Type** for a particular item, go to the **Item Detail** for that item and enter the new **Item Type** in the **Type** field or click the **Lookup** icon  to select from a list.

Master Menu Manufacturers

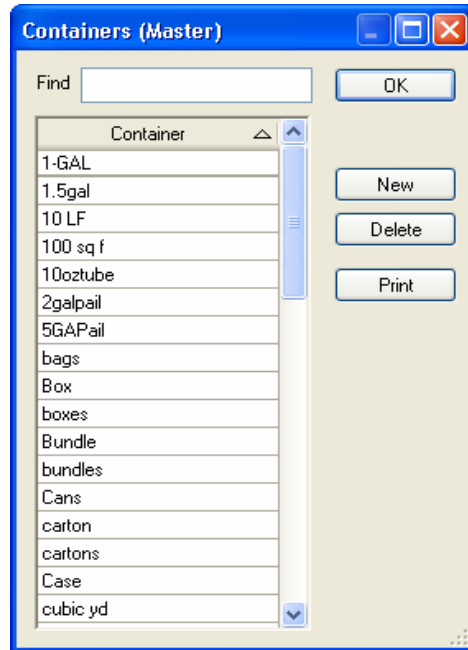
It is not required to include **Material Manufacturers** in your bids, but including them can help you keep track of material pricing better.





1. To add a new Manufacturer, from the **Master** menu, click **Material Manufacturers**. The **Material Manufacturer (Master)** dialog appears.
2. Click . A blank line will appear.
3. Enter the name of the new **Material Manufacturer** and click .

Master Menu Containers

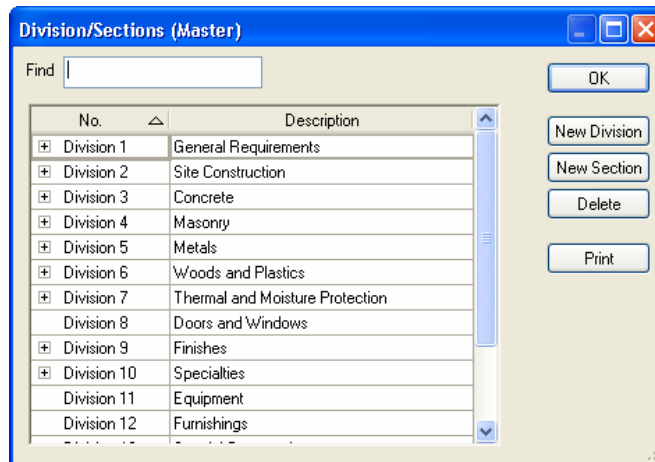
Containers refer to the manner in which a piece of material is priced. For instance, a container can be a box, bundle, each, etc. The **Containers (Master)** dialog stores a list of containers you can use in your bids.



1. To add a new Container, from the **Master** menu, click **Containers**. The **Containers (Master)** dialog appears.
2. Click . A blank line will appear.
3. Enter the name of the new **Container** and click .

Master Menu Divisions/Sections

Division and Section designations are taken from MasterFormat™ 2004 Edition produced by The Construction Specifications Institute (CSI) and Construction Specifications Canada (CSC). The default listings in Quick Bid do not include every Division or Section in the Master Format 2004 Edition. You may customize the list to include only those Divisions and Sections that affect your particular operation.

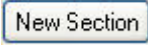
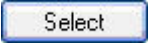


Adding and deleting Divisions and Sections is done at the Master level. Sections are assigned to divisions in Quick Bid. To create a new section you must either create it under an existing division or create a new division to assign it under.


Creating a New Division

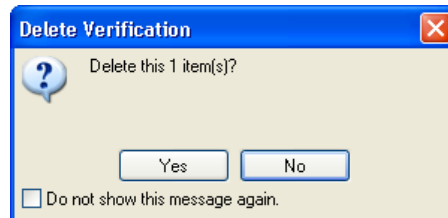
1. From the **Master** menu, click **Divisions/Sections**. The **Divisions/Sections (Master)** dialog appears.
2. Click **New Division** and a blank line will appear.
3. Enter a description for the division in the **Description** field.
4. To renumber a Division, click on it in the **No.** field and make your changes.
5. Once you have created a new Division, you must create its accompanying section or sections.

Creating a New Section

1. From the **Master** menu, click **Divisions/Sections**. The **Divisions/Sections (Master)** dialog appears.
2. Click  and a blank line will appear.
3. Enter a description for the Section in the **Description** field.
4. To renumber a Section, click on it in the **No.** field and make your changes.
5. Click  to place the new Section in your bid.

Deleting a Division or Section

1. From the **Master** menu, click **Divisions/Sections**. The **Divisions/Sections (Master)** dialog appears.
2. Select the Division or Section you want to delete by highlighting it.
3. Click . The **Delete Verification** dialog will appear.



NOTE: Turn on all confirmation dialogs must be checked to receive this dialog. To turn confirmation dialogs on or off go to **Tools > Options, General tab, Confirmations**.



4. Click either **Yes** to delete or **No** to return to the **Division/Section (Master)** dialog.

NOTE: See [Section 10, Active Bid Sections](#) for information on inserting Divisions and Sections into a bid.

Master Menu Cost Codes

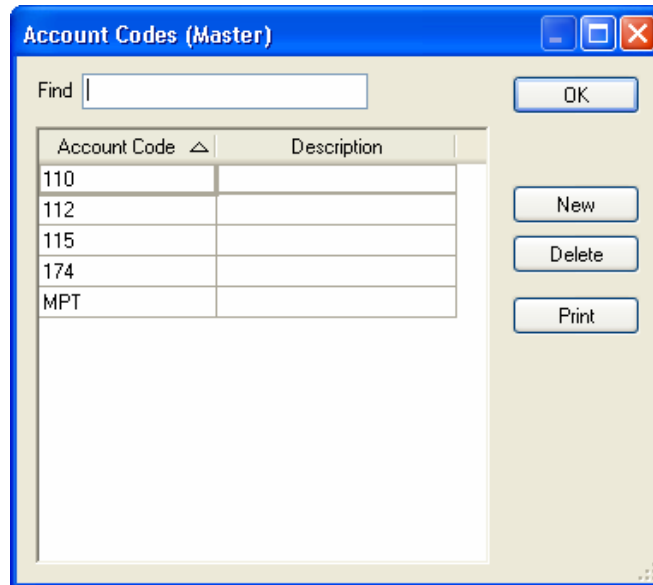
Cost Codes are used to group similar material and labor items into common categories. They are used to track and account for material and labor items in your bid reports. Categories like Wood, Tile and Insulation are examples of material cost codes and Finish, Hang Top Out and Install Mesh are examples of labor cost codes.



Type	Cost Code	Description	Account Code	Section
Labor	110CMU	CMU	110	
Labor	110DF		174	
Labor	110EG	EGGSHELL FINISH	110	
Labor	110PWC	PRIME WALLS	110	
Labor	110R&S	PAINT RISER/STRINGER 2CT ASG	115	
Labor	110SC	SPRAY POLY/ZOLOTONE TYPE	110	
Labor	110WDC	STAIN WOOD DECK	110	
Labor	112		112	
Labor	112BOL		110	
Labor	115FM	INTERIOR METALS	115	
Labor	2000-SC	w		
Labor	4200-BL	Lay CMU Block		
Labor	4200-BR	Lay Brick		
Labor	4200-BT	Install brick ties		

1. To create a new **Cost Code**, from the **Master** menu, click **Cost Codes**. The **Cost Code List (Master)** dialog appears.
2. Click . A blank line will appear.
3. Enter a unique identifier in the **Cost Code** field.
4. Enter a description for the **Cost Code** in the **Description** field.
5. Enter a **Type**, **Account Code**, and **Section** (optional).
6. Click  to exit the dialog.

Master Menu Account Codes

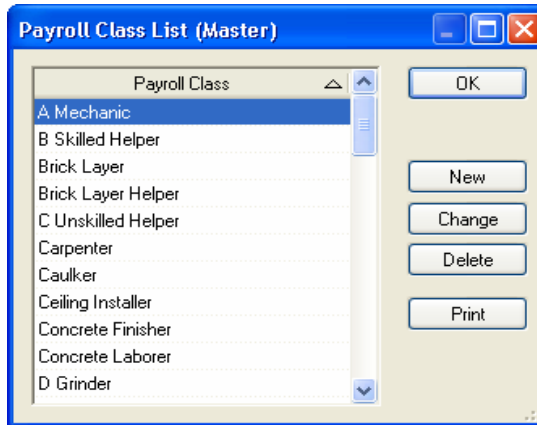
Account Codes are codes used for tracking in external accounting packages. You can include **Account Codes** on labor and material items, which allows you to export data directly from Quick Bid into your accounting hardware. You can use the same account codes that your accounting software uses or create new ones as needed.




1. To create a new **Account Code**, from the **Master** menu, click **Account Codes**. The **Account Code (Master)** dialog appears.
2. Click . A blank line will appear.
3. Enter the **Account Code** and **Description** in their respective fields.
4. Click  to exit the dialog.

Master Menu Payroll Classes

Payroll Classes are used to separate your labor costs into specific installation tasks. Your labor reports use pay classes to isolate labor by trade. The labor items on the **Payroll** tab are grouped by these classes. You can add, change or delete from the **Payroll Class List (Master)**.



1. To create a new **Payroll Class**, from the **Master** menu, click **Payroll Classes**. The **Payroll Class List (Master)** dialog appears.
2. Click  and the **Payroll Class Detail (Master)** dialog appears.




Section 5 – Master Menu Lists

- Enter a name in the **Name** field.
- Enter your numbers directly in the **Base Wage, Fees, Insurance** and **Tax** fields as needed for each **Wage Type**. See *Section 6, Databases, Setting Up Wages and Burdens* for instructions on creating additional wage types.

NOTE: You may leave a field blank if you don't use it to calculate labor or if you keep track of it elsewhere.

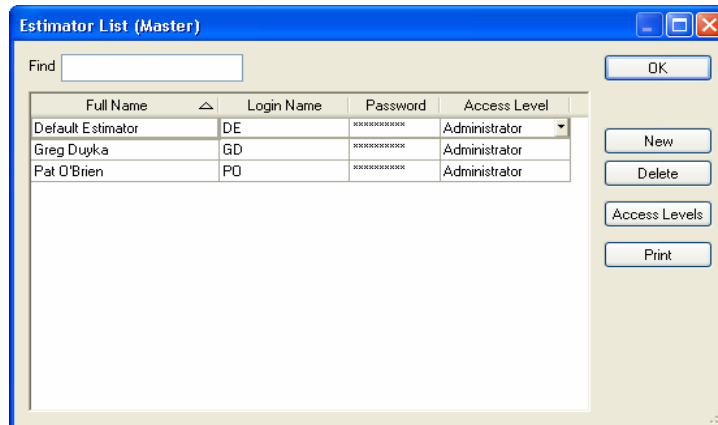
NOTE: The hourly wage and daily wage are calculated based on entries in the other fields and thus take no direct entries.

- Click . The **Payroll Class** will now be listed in the **Payroll Class List (Master)** dialog.


Master Menu Estimators

You may want to input all of the estimators who will be working in a specific database. Each database can contain a unique list of estimators. Having an estimator in one database does not necessarily mean that estimator will be included in other databases. Including estimators at the database level can save you time when working in bids by allowing you to pull from a list that has all of the estimator's information.

- To add an estimator, from the **Master** menu, click **Estimators**. The **Estimator List (Master)** dialog appears.



Full Name	Login Name	Password	Access Level
Default Estimator	DE	*****	Administrator
Greg Duyka	GD	*****	Administrator
Pat O'Brien	PO	*****	Administrator

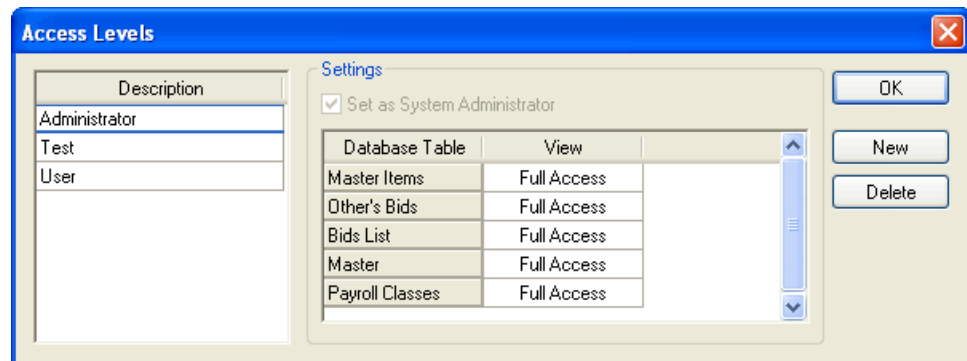
- Click  and type in the estimator's name in the blank cell that appears. The **Login Name** defaults to initials, but can be changed to whatever you choose.


3. Once you have added the estimator, you can set **Access Levels** for the estimator. An estimator's access to a database is controlled by logging in with a password at the splash screen when Quick Bid is first opened. Access is divided into four areas of the program: **Master Items, Other's Bids, Bid Lists, Master and Payroll Classes**. Each area may be assigned a level of access: **Full Access, No Access or Read-Only Access**.

NOTE: If Access rights are assigned, there must be at least one Administrator and each estimator must enter a login name and password.


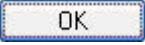
NOTE: Regardless of the access level assigned to an estimator, the estimator may always open and create a new bid using the current tables for his data. The estimator may change the prices for material and labor within his or her job, but may be denied the ability to modify the Master Tables (Master Lists) depending on access rights.

- a. Click . The **Access Levels** dialog appears.



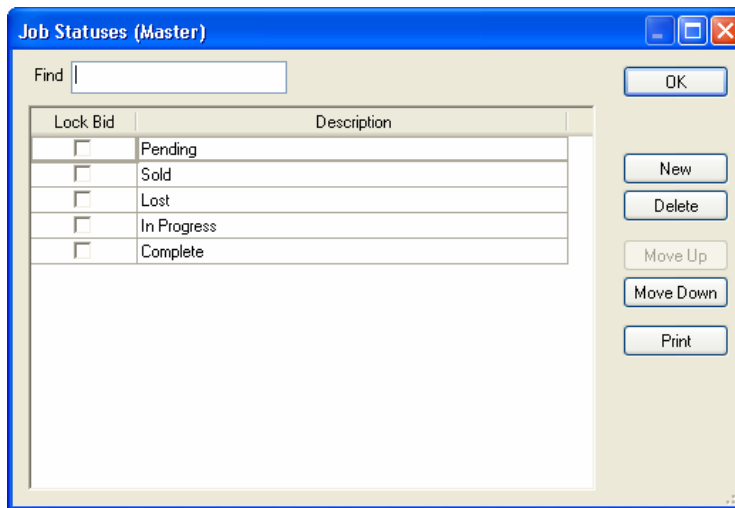
- b. Select an Access Level from those in the **Description** field. If the estimator is to be an administrator, put a check in the box next to **Set as System Administrator**. This estimator will have **Full Access** to all **Database Tables**.
- c. Choosing any other Access Level will allow you to set the estimator's Access Level for each of the Database Tables.
- d. To set Access Levels for a specific Database Table, click on the cell next to the Database Table under the **View** column. Select the Access Level for that table.
- e. To create a new Access Level, click . A blank line will appear under the Description field. Fill in the name you want to give the access level and assign levels accordingly.



Section 5 – Master Menu Lists

- f. Click  to take you back to the **Estimator List (Master)** dialog.
4. Click . The new estimator will be added to the master list.

Master Menu Job Statuses

A job status represents the current state of the bid. You can add, delete or lock a bid status. Locking the bid by placing a check mark in the box next to the bid status will place it in a 'read only' status. This will prevent changes being made to until the bid is unlocked.

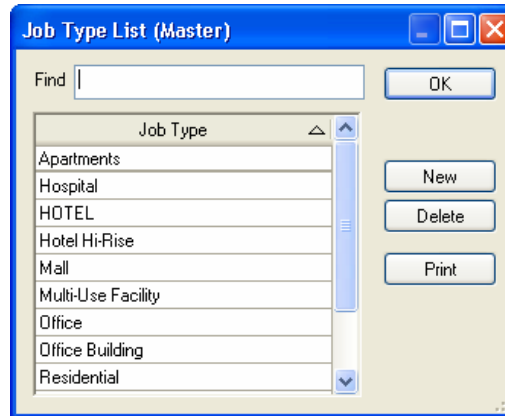




1. To create a new **Job Status**, from the **Master** menu, click **Job Statuses**.
2. The **Job Statuses (Master)** dialog appears.
3. Click . A blank line appears.
4. Enter the name of the new **Job Status**.
5. Click  to exit the dialog.

Master Menu Job Types

A Job Type can be anything you want. Typically, Job Types refer to the actual item being built, such as a Church, Hospital, Parking Lot, etc. You can use whatever nomenclature you choose for Job Types.

1. To create a new **Job Type**, from the **Master** menu, click **Job Types**.
2. The **Job Type List (Master)** dialog appears.

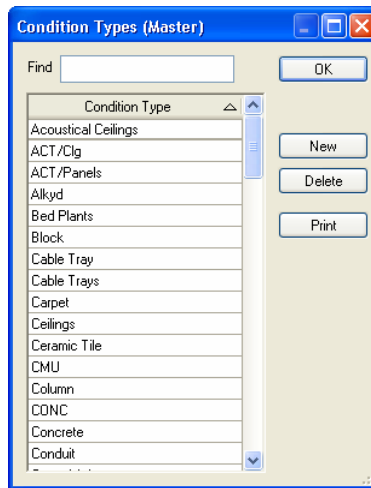




3. Click . A blank line appears.
4. Enter the name of the new **Job Type**.
5. Click  to exit the dialog.

Master Menu Condition Types

Condition Types describe the conditions you use in your bids. A Condition Type typically refers to the actual item, such as a Door, Partition, Shaft wall, etc. You can use whatever nomenclature you choose for Condition Types.

1. To create a new **Condition Type**, from the **Master** menu, click **Condition Types**.
2. The **Condition Types (Master)** dialog appears.



3. Click . A blank line appears.
4. Enter the name of the new **Condition Type**.
5. Click  to exit the dialog.

Master Menu Condition Assemblies

A **Condition Assembly** holds a saved set of material and labor items used to build a condition. It is like a template of items that you select to fill in your **Condition Detail**. You can save any conditions as an assembly. From the **Condition Assembly List (Master)** you can add, change or delete condition assemblies.

See [Section 9, Condition Assemblies](#) for details on creating, modifying and deleting condition assemblies.

Master Menu Equipment Assemblies

An **Equipment Assembly** can contain multiple items or it can be a single item. Equipment Assemblies are stored in the database and are available for use in any bid in that database. Using Equipment Assemblies can save a great deal of time when creating your bids. From the **Equipment Assembly List (Master)** you can add, change or delete equipment assemblies.

NOTE: See [Section 9, Equipment Assemblies](#) for details on creating, modifying and deleting equipment assemblies.

Master Menu Other Assemblies

An **Other Assembly** can contain multiple items or it can be a single item. Other Assemblies are stored in the database and are available for use in any bid in that database. Using Other Assemblies can save a great deal of time when creating your bids. From the **Other Assembly List (Master)** you can add, change or delete other assemblies.

NOTE: See *Section 9, Other Assemblies* for details on creating, modifying and deleting other assemblies.

Section 6

Databases


Creating Databases

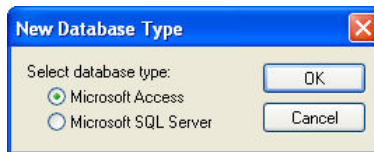
Creating a database is the essential first step to working with the Quick Bid program. A database holds all the information for your project. You can choose to have one or many databases. Typically the use of multiple databases improves performance and creates ease in sharing. Smaller databases run faster and when shared have fewer files at risk of corruption.

Some clients create a database for each estimator, while others use one for each different geographic location. This helps them use the default settings that match the needs of a particular project.

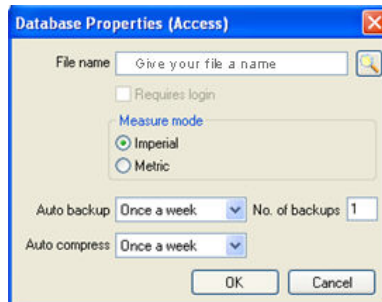
There are two types of databases: Microsoft Access and SQL Server. Determine which you will be using, and follow the directions provided below for creating that type of database.

Access Database

1. From the **File** menu, click **New > Database** or click the **New** icon dropdown  and click **Database** or right-click anywhere in the **Bid** window and select **New > Database**.
2. Select database type: **MS Access**, and click **OK**.



3. In the **Database Properties** dialog box you will give the database a file name, indicate if login is required, select a measure mode, and set up the auto backup and compress schedules.



- a. Enter a **File name** if you want the database to be saved in the default location. If you want to save the database in a location other than the default location, browse to the desired

location and enter a file name for your database. When you return to the **Database Properties (Access)** dialog, you will see the file location pathway in the **File name** field.

NOTE: Database names cannot contain \ / : * ? ' < > | ; symbols. The name you give your database will appear in the database list and on your main bids screen.

- b. The **Requires login** box will not be active until after you create the database. If you want to make the database password protected, proceed with the steps to create it then come back to Database Properties and check the box for this feature.
- c. In the **Measure mode** field, select either **Imperial** or **Metric** as the system of measurement to use. See *Section 4, Units of Measurement* for more information. All UOM boxes in the database will be based on the system of measurement you choose.
- d. Select how often you want an **auto-backup**, and indicate the **number of backups** you want to create. At the scheduled time, Quick Bid will perform the auto-backup upon close of the application. A dialog will appear letting you know that the backup is in progress.
- e. Select how often, if ever, you want to **auto-compress** the contents of your database to save disc space.
- f. Click **OK**. Your database will now be available and listed on the **Bid Navigator**.

SQL Database

WARNING: On Center Software cannot support SQL server setups or assist in the administration or troubleshooting of a SQL server's configuration. Only staff with knowledge of the server environment and with appropriate expertise in server configuration and administration should perform these actions. In some cases, a server may be configured in a way that would require additional steps not detailed in this process. These instructions are provided as a resource to be run at your own risk.

This document assumes that Microsoft SQL Server™ (v. 8.0) has already been installed on a server running Microsoft™ Server 2003™, and the server meets the minimum system requirements for SQL Server™. If SQL is not currently installed, we recommend that a certified IT professional assist you with the SQL setup and configuration.

Brief Overview

- The SQL database will be created from within Quick Bid.
- Any existing database(s) that you want to synchronize (optional) with the SQL database to be created, must be visible at your Bids tab.
- Windows Authentication should be used in most cases.

Step 1 - Install Quick Bid at Your Workstation

You do not need to install Quick Bid on the server. You must have the Quick Bid application installed at the workstation that you intend to follow these steps on.

Step 2 - Place Any Master Access Database on Server (optional)

If you have an existing Access (*.mdb) database that you want to synchronize with the SQL database to be created, please place the existing Access database in the C:\OCS Documents\QB location of the workstation you intend to follow these steps on.

Step 3 – Create SQL Database

1. Start Quick Bid.
2. Once application opens, click **File > New > Database**.
3. Select **Microsoft SQL Server**, then click **OK**.
4. The **Database Properties (SQL Server)** dialog opens.
5. Type the name of your SQL Server in the **SQL Server** field.
6. Select appropriate server authentication under **Connect using**.
7. Type in the **Login name** and **Password**.
8. In the **Database** field, type a name for your database.
9. Choose your **Measure mode** (typically Imperial) and Click **OK**
10. Your database should now appear at the **Bids** tab.
11. If you had an existing MS Access (*.mdb) database, it should be visible also.

Step 4 – Synchronize SQL Database with Access Database (optional)

If you have an existing database that you want to synchronize with the SQL Database you created during Step 3 please follow these steps. See [*Synchronizing Databases*](#), in this section, for instructions.

Step 5 – Transfer Bids into SQL Database (optional)

If you need to move bids from Access database to the SQL database, you must be able to see both databases in the Bid Navigator.

1. Expand the existing Access database to see bids it contains.
2. Drag and Drop the bid(s) from the Access database to the SQL database and release the mouse button. The bid begins to be copied.

Step 6 – Archive MS Access Database (optional)

Move the Access (*.mdb) database to a folder or CD that is not shared and not visible to Quick Bid.


NOTE: If you leave the Access (*.mdb) database visible, your estimators may accidentally work and create bids in the 'old' Access database as opposed to creating them in the newly created SQL database.

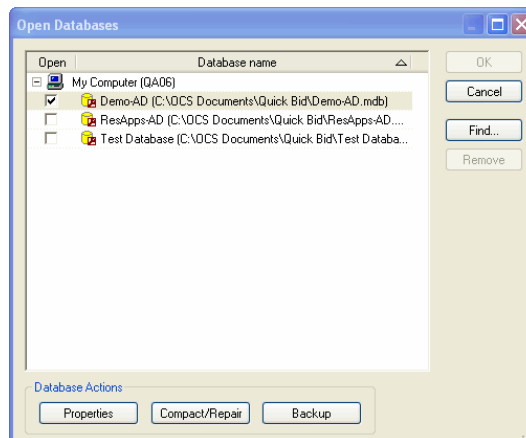
Step 7 – Start Working In Your New SQL Database


You should now be able to create bids in your newly created SQL database. If you require further technical assistance, contact Technical Support t at support@oncenter.com or 866-689-5687.

Opening a Database

More than one database can be stored on your computer or your server, and you can choose which databases appear on your screen. All databases you create will appear in the **Open Databases** dialog.

1. Right-click anywhere in the **Bids** tab window or the **Bid Navigator** window and select **Open**, or click  from the toolbar.
2. Place a check in the check box next to the database name(s) you want to open.



3. If your database is password protected, type in your Login Name and Password in the dialog that appears, then click .

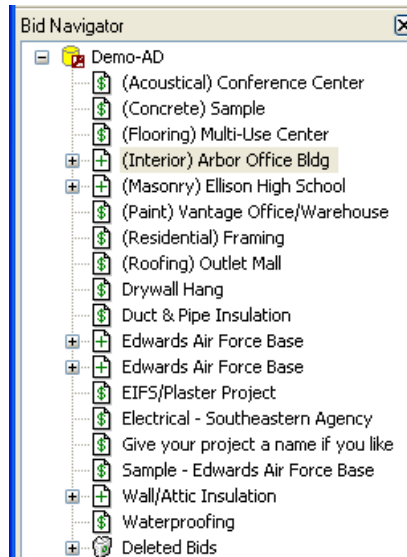
- To close a database-so that it doesn't appear on your screen-uncheck the check box next to the database name.

NOTE: When you close a database, you do not lose any information in your bids. Closing the database removes the database from your Bids window only. This allows you to see only those databases you are actively using.

Navigating Databases

The **Bid Navigator**, located to the left of the main display window acts as a database and bid organizer. The Bid Navigator is set up in a folder tree structure with bids appearing directly below their parent databases. You can have as many databases open along with their respective bids as you want in the Bid Navigator. See [Opening a Database](#), in this section, for more information.

NOTE: Use the Expand and Collapse buttons to help you navigate the databases and bids within them.



Synchronizing Databases

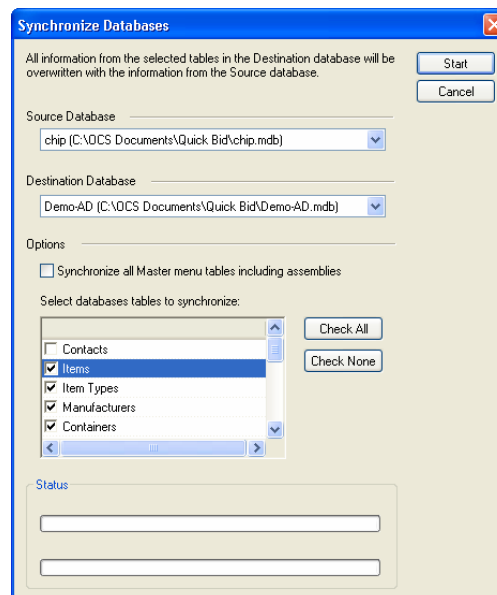
Synchronizing databases allows you to take information contained in the Master menu tables of one database and put that information into another database. You can also take the **Access Levels** table of one database and put the information into another database.

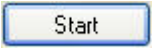
When synchronizing databases, the database you are taking information from is called the **Source** database, and the database that you are putting information into is called the **Destination** database. Keep in mind that when you synchronize databases, no information is actually removed from the Source database, it is only being added to the Destination database.

The synchronization process affects databases only and does not affect individual bids. The primary use of the Synchronization feature is so that you can easily create new databases and create all of the tables needed to complete a bid without having to manually input information. Some companies keep a **Master Database** and use this to create new databases, saving a great deal of time.

When you synchronize a database, you can either synchronize all of the table or any combination of tables. Because information from one table may affect information in another table, it is usually best to **Synchronize all Master menu tables**.

1. From the **Tools** menu, click **Synchronize Databases**. The **Synchronize Databases** dialog appears.








2. Synchronize all **Master** menu tables by placing a check mark in the box next to **Synchronize all Master menu tables**, or uncheck the box and select only the tables you want to synchronize.
3. Click .
4. When synchronization is complete, you may open the database and begin your project.

Sharing Databases

Quick Bid databases may be shared among different users working at different work stations. The database can be stored on a network or on a user's computer. Quick Bid uses MS Windows file sharing applications to share databases. Because of this, it is recommended that you have your IT professional or Network Administrator set up folders and files for sharing.

NOTE: You will need to know the name of your Network domain and the name of the work station computer you are trying to access. You will also need access rights to the workstation that holds the database you want. Ask your IT professional or Network Administrator for assistance.

Locate a Shared Database from Quick Bid

1. From the **File** menu, click **Open** or click the **Open** icon . The **Open Databases** dialog appears.
2. Click  and select **Microsoft Access**, then  in the **Select Database Type** dialog. The Database Properties (Access) dialog appears.
3. If you know the file path to the database, enter it or click the **Lookup** icon  in the **Database path** field. The **Select MS Access database** dialog appears.
4. **Browse** to the location of the shared database.
5. Select the database you want and click . The database now appears in your **Open Databases** dialog.
6. There should be a check mark in the box next to the name of the database. If there isn't one, check the box.
7. The database will now appear in your **Bid Navigator**. You can now work in the database as you would a database that is stored on your own workstation. fabulous

Locked Bids in Shared Database

Quick Bid allows only one user at a time to access a bid in a shared database. When you open a bid in a shared database, the program will lock that bid. This prevents any bid information discrepancies from arising. A lock symbol on the Bid Navigator will indicate that the bid is locked (opened by another user).




View User Locking the Bid

1. Highlight the locked bid in the **Bid Navigator**.
2. Right click on the bid. The **View Lock** option will appear.
3. Click the **View Lock** option to get User name, Date and Time.

Only the **Bids** tab will be available to view when a bid is locked; all other tabs will be disabled. The functions that enable the bid to be edited will also be disabled until the bid is unlocked. There are two way to unlock a bid.

1. The user in the bid exits the bid.
2. The user is forced out of the bid through the unlock process. See steps below.

Unlocking a Bid

1. From the **Bid Navigator** highlight the database that has the locked bid.
2. Right-click on the bid. The **Bid Context Menu** will appear.
3. Select **Bid Locks**. The **Locked Bid List** dialog will appear.
4. Click on the bid you wish to unlock, and click .

NOTE: From On-Screen Takeoff, a user will be able to modify a bid locked in Quick Bid. However, when the program saves, the information will not be updated.

Setting Database Default Preferences

Before you create your first bid in a new database, you need to set up your default preferences for the database. These preferences are sometimes referred to as **Master** level preferences. Setting up default preferences and master lists will provide time saving benefits and can ensure that your bids are accurate.

1. Set up Master Lists.
2. Set up Payroll Wages and Burdens.
3. Set up Standard Default Markups for Profit and Overhead.
4. Set up Default New Bid Options.

Setting Up Master Menu Lists

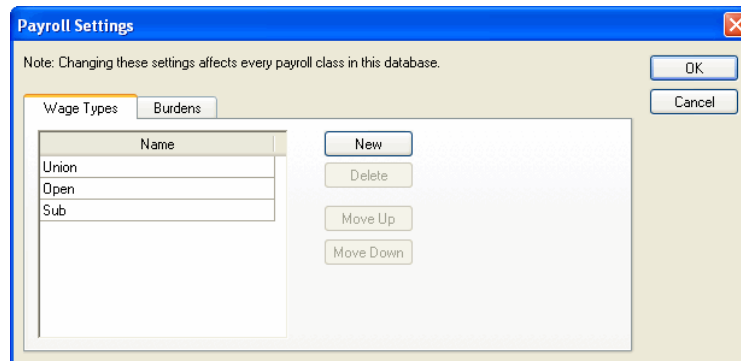
Master lists hold important information that you will use in your bids. See [Section 5, Master Menu Lists](#) for information on each of the master menu lists.


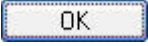
Setting Up Wages and Burdens

It is important to set up payroll wage types and burdens, because they appear throughout Quick Bid. Once you have set up wage types and burdens, you should set up the wages for each payroll class.

Setting Up Wage Types

1. To set up wage types, from the **Tools** menu, click **Payroll Settings**. The **Payroll Settings** dialog appears.



2. Click the **Wage Types** tab and click .
3. Enter the name of the new wage type.
4. Click  to return to the **Payroll Settings** dialog.

NOTE: Use the Move Up and Move Down buttons to reorder the list.

Setting Up Burdens

The **Burdens** tab allows for up to eight different burden descriptions. Fees, Insurance, and Tax are default burdens, but can be modified if you want. The **Method** and **Cost Code** for each burden can be modified at any time.

1. To set up burdens, from the **Tools** menu, click **Payroll Setting**. The **Payroll Settings** dialog appears.

- Click the **Burdens** tab.


Payroll Settings

Note: Changing these settings affects every payroll class in this database.

Wage Types **Burdens**

	Active	Name	Method	Cost Code
1	<input checked="" type="checkbox"/>	Fees	Amount	BURDEN-FEES
2	<input checked="" type="checkbox"/>	Insurance	Percent	BURDEN-INS
3	<input checked="" type="checkbox"/>	Tax	Percent	BURDEN-TAX
4	<input type="checkbox"/>		Amount	
5	<input type="checkbox"/>		Amount	
6	<input type="checkbox"/>		Amount	
7	<input type="checkbox"/>		Amount	
8	<input type="checkbox"/>		Amount	

OK
Cancel

- To create a new burden, enter a name in an open field. To change the name of a burden, select the field it is in and type over the name.
- Enter a **Method** for calculating burden— **Amount Choosing** or **Percent**.
- Enter a **Cost Code** or click the **Lookup** icon  to select from a list.

NOTE: To separate burden items on your reports, you must assign a Cost Code to each line of burden.
- Place a check in the **Active** box to make a burden available to every **Payroll Class**.
- Once you set up the preliminary payroll information (wage types and burdens) you can begin assigning wages to your Payroll Classes. See *Section 5, Master Menu Payroll Classes*.

NOTE: When viewing the Markup Detail, you will find that Quick Bid combines all burdens and displays them as a single percentage. Burdens entered as monetary amounts are converted to percentages and then added to your burdens that are entered as percentages. Example: A benefit package entered at \$12.50 per hour, with a base rate of \$25.00 would be converted to 50% of your base rate. If your tax and insurance amounted to 25%, Quick Bid will show your total burden as 75% at the Markup Detail.

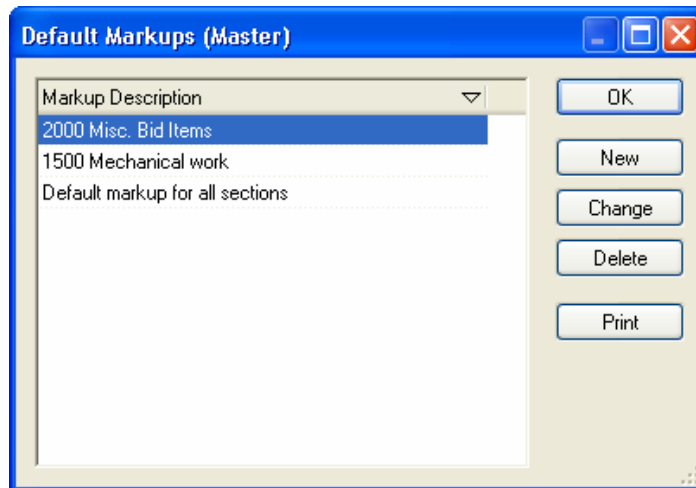
Setting Database Level Default Markups

Database level default **Markups** are preset percentage entries for **Escalation**, **Material Sales Tax**, **Overhead** and **Profit**. As you enter bid costs, these settings are automatically applied to material, labor, indirect costs, equipment and other costs. Setting database-level defaults for markups and indirect expenses will cause all future bids to automatically use these settings.

NOTE: Settings for markups can be changed at the bid level if you choose. See *Section 9, Markups* for more information.

NOTE: It is important that you understand how Markups affect your bid. It may help you to first change these settings at the bid level through the **Markups** tabs rather than modifying these database-wide settings at the **Tools** menu. Experiment with all the options. Analyze the results on your reports. When you are comfortable with the results, modify your markup and indirect expense database-level defaults as outlined below.

1. From the **Tools** menu, click **Default Markups/Indirect Expenses**. The **Default Markup (Master)** dialog appears.



Applying Markups to All Sections

1. Double-click **Default markup for all sections** in the **Default Markup (Master)** dialog. The **Default markup for all sections (Master)** dialog appears.


	Material	Labor	Equipment	Other
Escalation	0%	0%	0%	0%
Tax	0%		0%	0%
Overhead	10%	10%	10%	10%
Profits	15%	15%	15%	15%

Stock | Clean | Supervision | Per Diem | Notes

Calculation Method: Labor Hours | Show results as: Labor Cost



Payroll Class	Wage ...	Percent	Installer	Wage T.
		0%		

Previous | Next | OK | Cancel

2. Make your entries and click  to return to the **Default Markups (Master)** dialog.
3. Click **OK**. Your markups will be set.

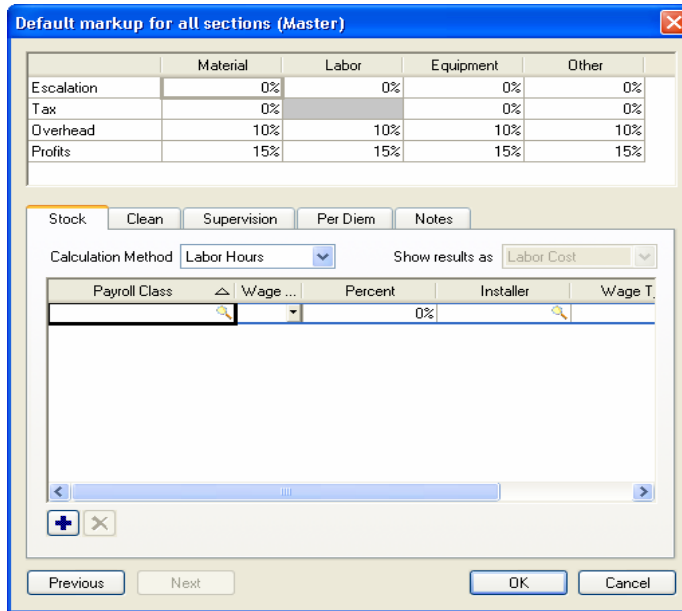
Changing Section Markup Entries

You can modify the settings in a section at any time. Keep in mind that when you add new sections, they will contain the settings you input in the **Default markup for all sections (Master)** dialog.

1. To modify the entries for a section, in the **Default Markups (Master)** dialog, click on a section, and click . The **Default Markup for Section Name (Master)** appears.
2. Make your changes to the entries and click  to return to the **Default Markups (Master)** dialog.


Setting Database Level Default Indirect Expenses

Indirect Expenses refer to expenses related to **Stock, Clean, Supervision** and **Per Diem**. Each indirect expense category has its own dialog in which you are able to add and modify the figures related to each expense.



1. From the **Tools** menu, click **Default Markups/Indirect Expenses**. The **Default Markups (Master)** dialog appears.
2. Make entries on the **Stock** tab. The Stock tab allows you to enter stocking costs on all materials or payroll classes in the database.
 - a. Choose a **Calculation Method** for Stock: To change the calculation method, click on the arrow in the Calculation Method field and click on your preferred calculation method.
 - **Material Quantity** - calculates how much it costs to stock the job based on the quantity of materials in the job.
 - **Material Cost** - calculates how much it costs to stock the job based on the material costs in the job.
 - **Labor Hours** - calculates how much it costs to stock the job based on the amount of labor hours required.

-
- b. Select results for the calculation method to can be shown as either **Labor Cost** or **Material Cost**. To change how the result is shown, click the arrow in the **Show result as** field, and click on your preferred result method.
 - c. Make any needed changes, additions or deletions to the **Payroll Class, Percent, Installer, Wage Type** or **Cost Code**. This can be done by typing in the cells or using the Lookup buttons provided.
 3. The **Clean** tab allows you to enter cleaning costs for materials or payroll classes in the database.
 - a. Determine **Calculation Method** and **Show results as** (same as Stock tab).
 - b. Enter the **Mat.** (material) **Cost Code, Cost** and **Cost Code**.
 4. The **Supervision** tab allows you to enter supervision costs of a job.
 - a. Click on the arrow in the Calculation method field and click on your preferred calculation method.
 - **Labor Cost** - calculates how much it costs to supervise a job based on the cost of labor in the job.
 - **Labor Hours** - calculates how much it costs to supervise a job based on the number of hours of labor in the job.
 - b. Enter the **Payroll Class, Wage Type, Percent, Supervisor, Wage Type** and **Cost Code**.
 5. The **Per Diem** tab allows you to enter allowances for daily expenses for a particular pay class.
 - a. Enter a number in the **Per Hour** or **Per Day** field for a **Payroll Class**.

NOTE: Entering a number in one of these fields will automatically cause the other field to be filled in. These fields auto-populate in this way depending on the number of hours you have set in a normal work day.
 - b. Enter a **Cost Code** and click  to return to the **Markup Detail (Master)** dialog.

Section 6 – Databases

NOTE: Make sure to set up **Indirect Expenses** for each **Payroll Class / Wage Type** combination. For example, if you are setting Stock for a Waterproofer and you use all three wage types in that payroll class, fill the entries for **Union, Open and Sub.**

Default markup for all sections (Master)

	Material	Labor	Equipment	Other
Escalation	0%	0%	0%	0%
Tax	0%		0%	0%
Overhead	10%	10%	10%	10%
Profits	15%	15%	15%	15%

Stock Clean Supervision Per Diem Notes

Calculation Method: Labor Hours Show results as: Labor Cost

Payroll Class	Wage ...	Percent	Installer	Wage T.
Waterproofer	Sub	55%	Caulker	Sub
Waterproofer	Open	55%	Caulker	Open
Waterproofer	Union	55%	Caulker	Union

Previous Next OK Cancel

Section 7

Options

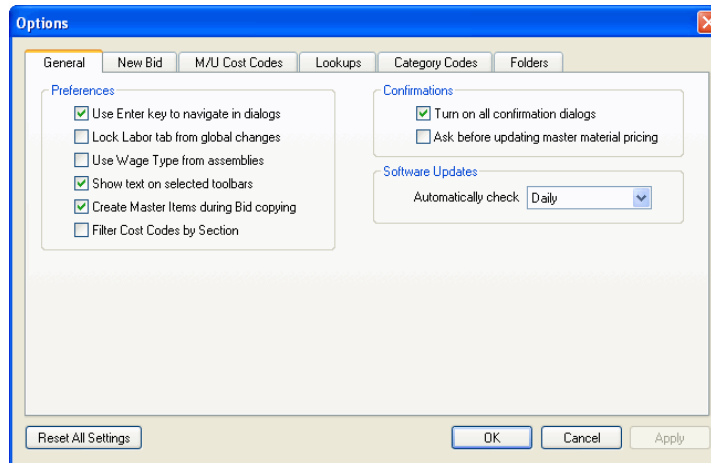
Section 7 – Options

Choosing your application and new bid options is an important step before you begin bidding in a new database. Once you choose these settings, they will be applied to each bid created in the database.

Setting Application Options

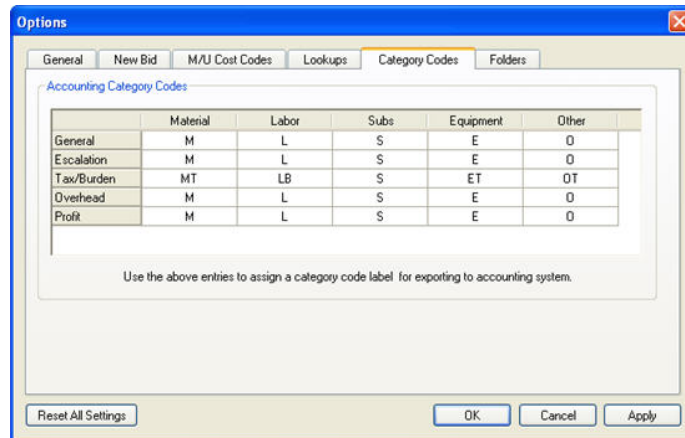
Application options will be applied to every project in the database. These options are set from the **General**, **Category Codes** and **Folders** tabs in the **Options** dialog.

1. From the **Tools** menu, click **Options**.
2. Choose options for each tab (**General**, **Category Codes** and **Folders**). Each tab is also referenced in *Program Help, Default New Bid Options*.



- a. **General tab** - provides options for a variety of aspects of your database. A list of fields and functions follows.
 - **Use Enter key to navigate in dialogs** - This option allows you to move from field to field by hitting the enter key on your keyboard.
 - **Lock labor Tab from global changes** - This option prevents estimators from going to the **Labor** tab and entering in new labor prices that will change all the conditions in the entire bid. The **Labor** tab becomes a Read-Only screen.
 - **Use Wage Type from Assemblies** - When this option is selected, the assemblies always default with their original wage types (Union, Sub, etc.) and bypass the default wage type selected at the bid Cover Sheet.

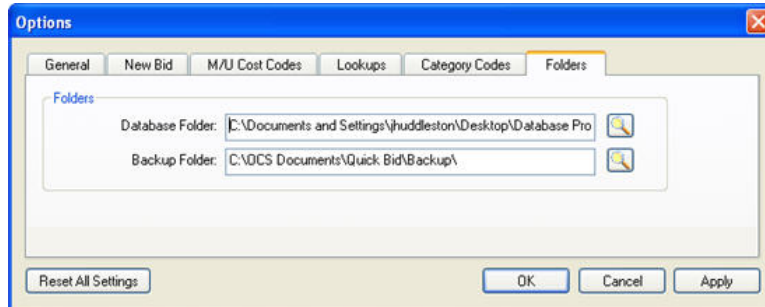
- **Show Text on Selected Toolbars** - This option causes the Bid Toolbar to display text beside each button describing its function.
 - **Create Master Item during Bid Copying** - When copying a bid from one database to another, this option will automatically add the bid's Items to the Master Items Table of the destination database.
 - **Filter Cost Codes by Section** - Allows cost codes to be filtered by section
 - **Turn on all confirmation dialogs** - This option will present a context window anytime you try to perform an action that merits a confirmation. This includes deletion of bids, conditions and payroll classes.
 - **Ask Before Updating Master Material Pricing** - This option will present a context window asking you to decide whether the changes you made to a material price in a bid should update the Master price. Any updates to the Master will affect all future bids.
 - **Software Updates** - Use this to select how often your software will automatically check for updates available for download.
- b. **Category Codes tab** - used in conjunction with your accounting programs. Use this tab to enter category codes that your accounting program will recognize. Refer to your accounting software product literature for information on importing.



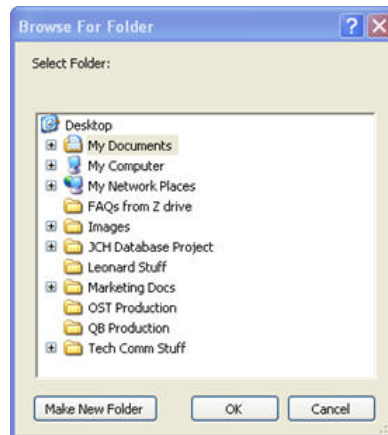
Enter the Category Code in the grid. It can be up to 14 characters long and can be letters, numbers or a combination of both.

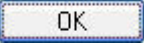
Section 7 – Options

- c. **Folders tab** - use to define the location of your Database and Backup folders.



1. To locate a folder, click the **Lookup** icon . The **Browse for Folder** dialog appears.



2. Navigate to your desired folder and select it.
3. Once you have selected the folder you want, click  to return to the **Folders** tab.

Setting New Bid Options

1. From the **Tools** menu, click **Options**.
2. Choose options on each tab (**New Bid**, **M/U Cost Codes** and **Lookups**). Each tab is also referenced in *Program Help, Default New Bid Options*.
 - a. **New Bid tab** - provides options for a variety of aspects of your database. A list of fields and functions follows.

- **Next Bid Number** - Enter the next bid number here. You can enter any number you want, as long as they are not repeated.
- **Bidding Company** - This option allows you to automatically insert your company name at the cover sheet as the bidding company when you open a new bid. This name will appear on all of your bid reports and proposals.
- **Default Wage Type** - This option allows you to choose a default wage type, which will be applied to each new bid you create.
- **Hours/Day** - This option defines the hours in a work day. It's the hours you pay per day. If you change your hours per day, production per hour will remain the same by default but production per day will change. So quantity, pieces, and time expressed in days are affected.
- **Days/Week** - Enter the number of days in a regular work week.

Section 7 - Options

- **Markup Method** - This option may be changed on the bid Cover Sheet for each new bid. The straight method applies markup to cost while the Gross Method applies it to the selling price.
 - Straight markup multiplies cost by a percentage. In this example a 20% markup on cost would be (cost x 1.20 = total) or \$1,000 x 1.20 = \$1,200.
 - Gross Profit Margin, on the other hand, takes bid cost and divides it by the remainder of 1 minus the markup percentage. In this example, a 20% Gross Profit Margin would be (cost / (1-20% = 80%) = Total) or \$1,000 / 80% = \$1,250.
 - **Apply labor to additional waste quantity** - This option allows Quick Bid to apply labor on any waste quantities or any quantity that is increased at the Materials tab when the round-up feature is applied.
 - **Apply Default Indirect Expenses for** - If you have set up indirect expenses at the **Tools** menu for stock, clean, supervision and per diem, when checked, this option applies indirect expenses to each section that holds indirect expense defaults.
 - **Cover Page Report Text** - This text box allows you to type in whatever you would like to always print as a cover page for your bid reports.
- b. **MU (Markup) Cost Codes tab** - allows you to assign Cost Codes to Material, Labor, Equipment and Other Markup items. These codes are used to control the layout of information shown on Bid Reports and Bid Exports.

Options


General New Bid **MU Cost Codes** Lookups Category Codes Folders




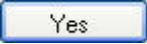
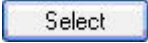
Markup Cost Codes

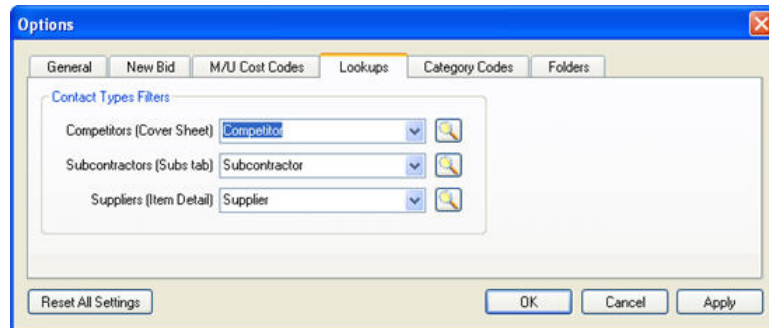
	Material	Labor	Equipment	Other
Escalation	<input type="text"/>			
Tax				
Overhead				
Profit				

Use the above entries to assign a cost code to markup values for reporting and exporting.

Reset All Settings OK Cancel Apply

1. To enter a Cost Code, click on the field you want to enter it into, or click the **Lookup** icon  icon to select from a list.

2. To create a new Cost Code, click the **Lookup** icon  in any field. In the Cost Code List dialog click .
 3. In the blank field that appears at the bottom of the list enter a Description, Type, Cost Code (how you want it to appear in lists), Account Code (if any) and Section.
 4. Once you have entered the information, click  to return to the M/U Cost Codes tab dialog.
 5. An alternate method for creating a new Cost Code is to type in a name for your Cost Code in one of the fields, and then hit Enter on your keyboard.
 6. Click  in the dialog that appears. The Cost Code List dialog appears.
 7. Enter information into the other fields as required, then click  to return to the **M/U Cost Codes** tab dialog.
- c. **Lookups tab** - allows you to select the Contact Type for various lookups. To modify a Contact Type, click the arrow in the respective field and select a type from the list.



Section 8

Bids, Alternates & Change Orders

Bids

A bid is the estimated total cost of material and labor (including profit) for a given project. Quick Bid provides an accurate and efficient way to create what was once a tedious and time consuming process.


There are four ways to create a bid in Quick Bid:

- Create a new bid from scratch.
- Duplicate an existing bid.
- Import an On-Screen Takeoff® file.
- Send an On-Screen Takeoff bid to Quick Bid using Interactive or Manual Mode.

NOTE: See [Section 12, Quick Bid & On-Screen Takeoff Interaction](#) for instructions on how to create a bid using On-Screen Takeoff.

Creating Bids

1. From the **File** menu, click **New > Bid** or

Click the **New** icon drop down  and click **Bid** or

Right-click anywhere in the **Bids** window, and select **New > Bid** or

Hit the Insert button on your keyboard.

2. When the **Cover Sheet** comes up, type the name of your bid in the **Project Name** field.

3. Click . Your new bid will appear in the **Bid Navigator**.

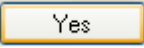
NOTE: When you first create a **Bid**, the only field on the **Cover Sheet** that requires information is the **Project Name** field. There are other fields, however, that you may want to enter information into before you begin. See [Bid Cover Sheet](#), in this section, for information about completing the Cover Sheet.

Duplicating an Existing Bid

1. Right-click on the bid, and select **Duplicate**, or

Press **Ctrl D** from your keyboard, or

From the **Edit** menu, select **Duplicate**

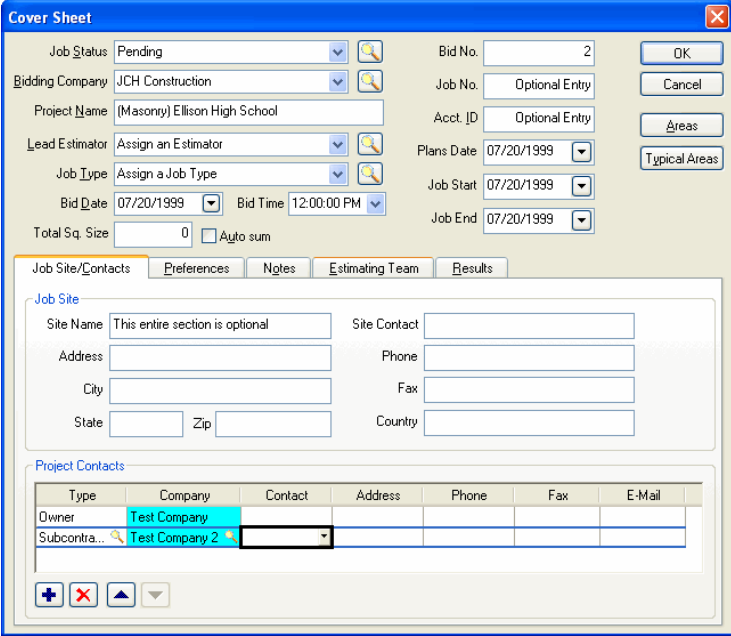
2. Click  in the **Duplicate Bid** dialog. The duplicated bid will appear in the **Bid Navigator** list with the same name as the original bid.
3. Double-click the bid to bring up the **Cover Sheet** and change the name in the **Project Name** field.

NOTE: The duplicated bid will have all the same properties as the original. You should change the **Project Name**, and make any other changes, if needed, once it is created.

Bid Cover Sheet

Every bid, change order and alternate has a **Cover Sheet**. The Cover Sheet allows you to create and store bid specific information. The **Bid Cover Sheet** has five tabs: **Job Site/Contacts**, **Preferences**, **Notes**, **Estimating Team** and **Results**.

NOTE: The **Project Name** is always a required entry. However, it is recommended to select a **Job Type** and an **Estimator**. These are used as filter fields on the **Bid List** and on the **Bids** tab.



Cover Sheet

Job Status: Pending
 Bidding Company: JCH Construction
 Project Name: (Masonry) Ellison High School
 Lead Estimator: Assign an Estimator
 Job Type: Assign a Job Type
 Bid Date: 07/20/1999
 Bid Time: 12:00:00 PM
 Total Sq. Size: 0 Auto sum

Bid No.: 2
 Job No.: Optional Entry
 Acct. ID: Optional Entry
 Plans Date: 07/20/1999
 Job Start: 07/20/1999
 Job End: 07/20/1999

Buttons: OK, Cancel, Areas, Typical Areas

Tabs: Job Site/Contacts, Preferences, Notes, Estimating Team, Results

Job Site

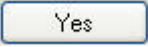
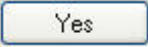
Site Name: This entire section is optional
 Address:
 City:
 State:
 Zip:
 Site Contact:
 Phone:
 Fax:
 Country:


Project Contacts


Type	Company	Contact	Address	Phone	Fax	E-Mail
Owner	Test Company					
Subcontra...	Test Company 2					

Buttons: +, X, ▲, ▼

Completing the Cover Sheet

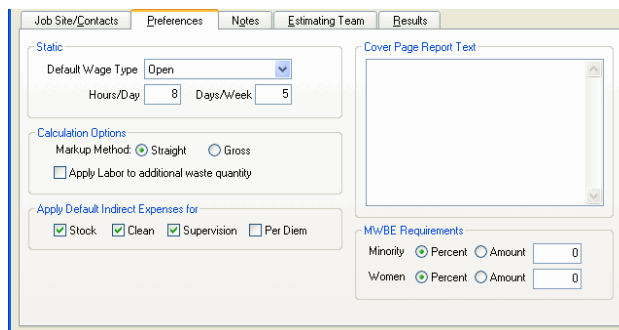
1. Select a **Job Status** by clicking the arrow next to the field, and select a status from the list. If you want to create a custom job status, type it in, and hit Enter. Click  in the dialog box that appears. See [Section 5, Master Menu Job Statuses](#) for details on creating new statuses.
2. Select the **Bidding Company** by clicking the arrow next to the field, and select a company from the list. See [Section 5, Master Menu Contacts](#) for details on adding a company to your contact list.
3. The **Project Name** field requires that you create a name for your bid. Type in a name in the field.
4. Select the **Lead Estimator** for the job by clicking the arrow next to the field and selecting one from the list. See [Section 5, Master Menu Estimators](#) for details on adding estimators to your database.
5. Select a **Job Type** by clicking the arrow next to the field, and select a status from the list. If you want to create a new one, type it in, and hit Enter. Click  in the dialog box that appears. See [Section 5, Master Menu Job Types](#) for details on creating new job types.
6. The **Bid Date** field populates with the current date. To select another date, click the arrow and select a date from the calendar, or you can type in the date you want.
7. The **Bid Time** field populates with the current time. To select another time, click the arrow and select a time from the list, or you can type in the time you want.
8. The **Total Sq. Size** is an optional entry that accepts the square footage of a building or site area and is used in the **Bid Analysis** report to establish cost ratios.
9. Place a check in the box next to **Auto sum** to have Quick Bid automatically sum the cumulative total of all areas as you create the bid.
10. **Bid No.** field auto-populates, but can be changed to any number you want.
11. **Job No.** is an optional entry. Your job number can be a number or an alpha-numeric entry.
12. **Acct. ID** is an optional entry. Your Account ID can be a number can be a number or an alpha-numeric entry.
13. **Plans Date** is an optional entry. To select another date, click the arrow and select a date from the calendar, or you can type in the date you want.
14. **Job Start** is an optional entry. To select another date, click the arrow and select a date from the calendar, or you can type in the date you want.
15. **Job End** is an optional entry. To select another date, click the arrow and select a date from the calendar, or you can type in the date you want.

16. **Job Site/Contacts** tab is the default tab that is active each time you open the Cover Sheet.
 - **Job Site** field is optional are to enter job site information.
 - **Project Contacts** field is where you can add any contacts for the job such as architect, owner, other subs, etc. Enter **Company** information first, then select a **Type**.
17. **Preferences** tab allows you to set preferences for the bid you are in. Changing preferences here will not affect your database-level defaults. See [Setting Bid Preferences](#), in this section, for additional details.
18. **Notes** tab provides you with a location to type in any notes you may want to include. These notes can be printed in a bid report.
19. **Estimating Team** tab is used if you have multiple estimators sharing a database. You can set access rights for each estimator. Click  to select the estimator(s) you would like listed. Access Level can be updated by clicking in the appropriate cell and selecting the access level from the drop down list.

Note: This tab will only allow for you to increase the access level for an estimator. It changes the access level only for the open bid. See [Section 5, Master Menu Estimators](#), for information on how to change access levels at a master level.
20. **Results** tab is used to record the results of the bid. You can enter competitor information and whether they were awarded the bid or not. To search for a competitor, click the Lookup icon  and select from the list in the **Contacts (Master)** dialog.

Setting Bid Preferences

1. Open the **Cover Sheet** and select the **Preferences** tab.



The screenshot shows the 'Preferences' tab in a software application. The interface includes several sections:

- Static:** Contains a 'Default Wage Type' dropdown menu set to 'Open', and input fields for 'Hours/Day' (8) and 'Days/Week' (5).
- Calculation Options:** Includes radio buttons for 'Markup Method' (Straight selected, Gross unselected) and a checkbox for 'Apply Labor to additional waste quantity' (unchecked).
- Apply Default Indirect Expenses for:** Includes checkboxes for 'Stock' (checked), 'Clean' (checked), 'Supervision' (checked), and 'Per Diem' (unchecked).
- Cover Page Report Text:** A large empty text area for entering report text.
- MWBE Requirements:** Includes radio buttons for 'Minority' (Percent selected, Amount unselected) and 'Women' (Percent selected, Amount unselected), with input fields for values (both set to 0).

2. Select or type in your preference for each field.
 - **Static** - Select a Default Wage Type from the list. Enter the number of hours in a regular work day. Enter the number of days in a regular work week.
 - **Calculation Options** - Select a Markup Method. Place a check in the box if you want to Apply Labor to additional waste quantity, which will apply labor on any waste quantities or any quantity the is increased at the Materials tab when the round-up feature is used.
 - **Apply Default Indirect Expenses for** - If you have set up indirect expenses at the Tool menu for stock, clean, supervision and per diem, when checked, this option applies indirect expenses to each section that holds indirect expense defaults.
 - **Cover Page Report Text** - Type in text as you want it to appear on the cover page for your bid reports.
 - **MWBE Requirements** - Enter MWBE (Minority and Women -owned Business Enterprise) Requirement information here.

NOTE: Setting bid preferences in this manner will affect the selected bid only, and will not affect your database default settings.

Alternates

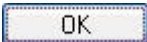
An **Alternate** is an optional cost for a bid and can be turned on or off by accepting the alternate or not. The final bid total will reflect the total from the base bid and the totals from any accepted alternates.

Because alternates are part of the bid, they must use the same bid items and payroll settings that are used in the base bid. You can, however, change markups and indirect expenses for alternates.

1. Select a **Bid** in the **Bid Navigator**, then from the **File** menu, click **New > Alternate** or

Click the **New** icon dropdown and click **Alternate** or

Right-click anywhere in the **Bids** window and select **New > Alternate**. The **Alternate Cover Sheet** dialog appears.

2. Enter a name for the Alternate in the **Name** field.
3. Enter a job number in the **Job No.** field and an account identification in the **Acct. ID** field. These are optional entries
4. The **Submitted** date field will be populated with the current date. You can change it by clicking the arrow next to the field and selecting a date from the calendar.
5. Place a check in the box next to **Accepted** if you want to include the alternate totals into the bid grand total.
6. Document important information about the alternate in the **Notes** window.
7. Click . The **Condition** tab for the alternate will open.
8. Build conditions for your alternate as you would for a normal bid, and add bid costs. See [Section 9 Conditions, Assemblies and Markups](#) for more information.

NOTE: Alternates appear directly below their base bids. If you don't see an **Alternate** in the **Bid Navigator**, locate its base bid and click on the plus sign (+) to the left of the base bid name. The Alternate will appear below the base bid.

NOTE: You can come back to the **Alternate Cover Sheet** dialog to change acceptance or any other field. Double-click on the **Alternate** in the **Bid Navigator**, and the **Alternate Cover Sheet** dialog will appear.

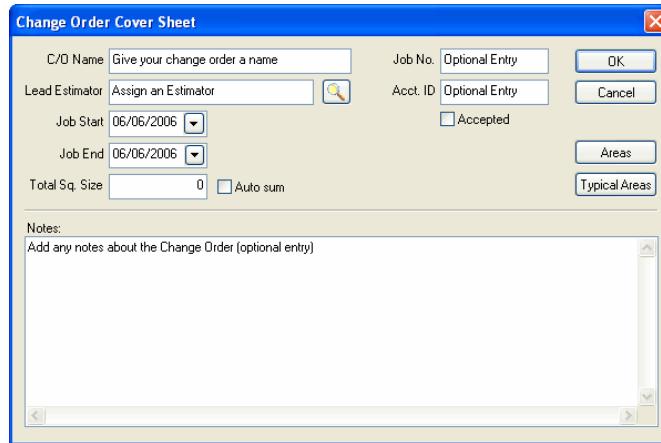
Change Orders

A **Change Order** is a separate bid that accompanies a base bid. As the name implies, Change Orders reflect changes to some aspect of the base bid. As such, Change Orders and base bids can have different Payroll, Material pricing, Section Markups and Indirect Expense information.

1. Select a **Bid** in the **Bid Navigator**, then from the **File** menu, click **New > Change Order** or


Click the **New** icon dropdown and click **Change Order** or

Right-click anywhere in the **Bids** window, and select **New > Change Order**. The **Change Order Cover Sheet** dialog appears.



The screenshot shows the 'Change Order Cover Sheet' dialog box. It has a title bar with a close button. The dialog contains several input fields and buttons. The fields are: 'C/O Name' with the placeholder text 'Give your change order a name'; 'Job No.' with 'Optional Entry' and an 'OK' button; 'Lead Estimator' with 'Assign an Estimator' and a search icon; 'Acct. ID' with 'Optional Entry' and a 'Cancel' button; 'Job Start' and 'Job End' with date pickers set to '06/06/2006'; 'Total Sq. Size' with a text box containing '0' and an 'Auto sum' checkbox; and 'Notes' with a text area containing the placeholder text 'Add any notes about the Change Order (optional entry)'. There are also 'Accepted' checkbox, 'Areas', and 'Typical Areas' buttons.

2. Enter a name for the **Change Order** in the **C/O Name** field.
3. Enter a job number in the **Job No.** field, and account identification in the **Acct. ID** field. These are optional entries
4. Enter the **Job Start** and **Job End** dates in their respective fields, or click the arrow and select a date from the calendar.
5. Place a check in the box next to **Accepted** if you want to include the change order in the base bid's grand total. The **Change Order** will appear on the **Bid Summary Report**.
6. Enter a value in the **Total Sq. Size** field or place a check in the box next to **Auto sum** to have the program calculate total size based on the values you apply to your condition(s).
7. Document any important information in the **Notes** field.

8. Click  The program will open the **Conditions** tab.
9. Build conditions for your Change Order as you would for a normal bid, and add bid costs. See *Section 9, Conditions, Assemblies & Markups*, for more information.

NOTE: Change Orders appear directly below their base bids. If you don't see a **Change Order** in the **Bid Navigator**, locate its base bid and click on the plus sign (+) to the left of the base bid name. The **Change Order** will appear below the base bid.

NOTE: You can come back to the **Change Order Cover Sheet** dialog to change acceptance or any other field. Double -click on the **Change Order** in the **Bid Navigator**, and the **Change Order Cover Sheet** dialog for will appear.

Section 9

Conditions, Assemblies & Markups

Conditions

A **Condition** is a description of an object such as a floor, wall, door, etc. A condition contains all of the information about a particular object. Conditions are typically built for each item. You can create complex groups of materials and labor into each condition that occurs individually or in multiple areas.


1. To create a new condition, from the **File** menu, click **New > Condition** or

Click the **New** icon dropdown  and click **Condition** or

Right-click anywhere in the **Conditions** tab window and select **New Condition** or

From **Bid Navigator**, right-click anywhere in the window and select **New > Condition**. The **Condition Detail** dialog will appear.

2. Enter information in the of the **Condition Detail** dialog to build your condition.



The screenshot shows the 'Condition Detail' dialog box. It is divided into several sections:

- Condition Information Area:** Contains fields for Name (Type C Labor Separate), Type (Undersplit), Area (Floor 2), and Quantity (1: 400 LF, 2: 0 EA, 3: 0 EA).
- Section Totals Area:** A small table at the top right showing material and labor totals for different sections.
- Notes Area:** A text area containing a note: "Labor is applied to each item for track and studs separately rather than by FMLF or FMSF code putting labor in one entry for entire condition."
- Detail Area:** A large table listing items with columns for Sect, Item, Lab Code, Height, OC, Layers, Qty, UOM, Size, Mat Price, Per, Lab Cost, Wage Type, Crew, SBase, Qty/Hr, Pcs/Hr, Crew Hrs, Mat Total, and Lab Total.
- Detail Controls Area:** Includes buttons for 'Assembly', 'Labor Adjust', 'Print', 'Previous', 'Next', and 'Valid'.

Condition Detail

In Quick Bid, conditions are created on the **Condition Detail** dialog. It is important that you understand the layout and function of each area in the **Condition Detail** dialog, as this is where you will perform most of your work in Quick Bid. The **Condition Detail** dialog consists of five main sections: **Condition Information Area**, **Section Totals Area**, **Notes Area**, **Detail Area** and **Detail Controls Area**.

Condition Information Area

- **Cond. No.** (Condition Number) is automatically assigned to a condition. It determines where on the Conditions tab it will be placed. The condition number can be modified to move up or down on the conditions list for convenience.
- **Name** entered will show on all the reports and help identify the condition back to the drawings. Usually the entry will be a section or detail number, or a reference from an architectural schedule for doors, walls ceilings, finishes, etc. The condition name is user defined and is not supported with a drop down menu.
- **Type** is used as an indexing devise for the Condition and Assembly lists. When Condition Details are assigned a Type from the lookup menu, the Conditions list can be sorted or grouped by Type. As an example, all columns would be grouped together at the conditions List. The Type also indexes the Assembly list so that similar conditions will be grouped together when the Assembly list is viewed in the expanded mode.
- **Area** allows you to assign the condition to a specific building area or multiple building areas.
- **Multi-Area** is used to assign quantities and counts across multiple areas. These areas include typical areas. Typical Areas are always listed at the top left, if they exist, and Building Areas will appear beneath them.
- **Quantity** the amounts in both the primary (Quantity 1) and secondary fields (Quantity 2 & 3) comes directly from your takeoff and normally no UOM conversion is necessary. If you take off an object in LF, then the quantity is entered in LF, etc. You may enter a whole or fractional value. Example 100 SF or 15.33 LF. In metric, we would enter millimeters or meters. Most labor or material items calculate from the **Quantity 1** field. Area quantities entered at the Multi Area list will be summarized and displayed at the condition in the proper quantity fields (1, 2 or 3).
- **Unit of measure (UOM)** may be selected by using the drop-down menu button to the right of the Quantity field or you may use your keyboard to select a different UOM. This UOM controls the initial default for the Totals View display. When EA is used as the UOM (unit of measure), the physical dimensions of the object cannot be defined without a height and width or length. The Width and Depth fields automatically appear. All three of these attributes may be entered to extract a physical size of the EA item. When Width and Depth are entered, Quick Bid assumes you are building a four sided rectangular object, thus a perimeter value can be established (Width + Depth X 2).

In effect, by entering width and depth you are assigning EA conditions a linear value so that materials set up to calculate linear values will work for the EA setup. For example, a single column entered at the Condition detail, could be assigned a UOM of EA, a height of 10'-0", a Width of 2'-0"

Section 9 – Conditions, Assemblies & Markups

and a Depth of 3'-0". If the code X-58 (gypsum board) were entered into the condition grid, the quantity calculation would be 200 SF. $1 \text{ EA} \times [(\text{width} + \text{depth}) \times 2] \times \text{Ht} \times \text{Layers} = \text{Total SF of board}$
 $1 \text{ EA} \times [(2'-0" + 3'-0") \times 2] \times 10' \times 2 \text{ layers} = 200 \text{ SF of board.}$

- **Height** is used as a factor to calculate quantities of certain material and labor items. If Imperial entries are made, both feet and inches must be entered. If the condition is 10 feet high, you must enter 1000, or 10 feet 00 inches. If it's 13'8", you enter 1308. If you enter 49, the result will be 4'1" in the height column. Metric heights are entered in millimeters.
- **Count:** Count represents the number of reoccurrences for this condition type. The columns on the right (Qty 1,2,3 and Count) will automatically sum their totals and enter them back at the corresponding Condition Detail fields.

Section Totals Area

- The grid area displays section totals. It holds the condition pricing information resulting from the labor and material entered in the Condition Detail along with the markups entered at the Markup Detail.
- **Totals View** is directly related to the Condition UOM and controls the displayed section totals. Changing the UOM at the drop down menu changes the Section Totals results. For example, the marked up price of a condition entered in LF may be viewed in SF or SY. Changing the Totals View only changes the display in the Condition Detail but does not control the results shown on the printed reports.
- **View Markup** button allows you to view all of the direct and indirect expenses in the grid display. When selected, this button opens the **View Markup** dialog. This read-only window displays the costs for material and labor summarized from the Condition Detail. The View Markup dialog will also **show indirect expenses** like escalation, profit, material sales tax and labor burden if they were previously entered. It is specific to the opened Condition Detail and justifies the value shown for the Condition Detail.

Condition Notes Area

This is a text box used for entering notes. Using notes is a way to conveniently communicate important information that pertains to the building of the condition. You can use notes to keep a record of unusual codes or out of the ordinary instructions regarding the condition. You can even print the notes on the Bid Summary, Production and Field reports to communicate with field personnel.

Detail Area

The lower part of the Condition Detail is known as the (Item) **Detail Area** and holds all the material and labor items required to build the condition. The Detail Area uses a grid divided into columns which display default information for items entered on each row. These columns hold Item codes, default settings, cost tracking information, material and labor values as well as production information.

When an item code is entered into the Detail Area, the defaults are displayed to show how the quantity was calculated. The **height, on-centers, layers**, and even the **quantity** can be changed. Changing these values only affects this condition and does not affect the **Item** record or any other conditions within the job. Labor is reported by Unit Cost, Production, Crew Time and Total money. Since these values are interrelated, changing one value automatically updates the others.

- **Sect (Section)** displays the section number which defaults from the Master Item record. Section numbers may be temporarily changed at the condition without affecting the Master record.
- **Item** displays the Item code and functions as the main entry field for a detail item
- **Lab. Code (Labor Cost Code)** displays the Item's default labor Cost Code if labor is associated. Also allows direct entry changes if Item is setup as a material and labor Item
- **Height** Displays the item's height (If the item is set up as horizontal and continuous, this field will be disabled from direct entry changes)
- **OC (On Center)** represents the on center value for a material item.
- **Layers** displays the number of layers or rows applied to this item.
- **Qty (Quantity)** represents the amount of this item needed to build this condition.
- **UOM (Unit of Measure)** represents the unit of measure specified for this item's quantity.
- **Size** displays the size, style or mixture for this item. Some items are set up with multiple sizes and will be shown in a blue field at the size column. These too may be changed at the Size column by simply clicking the size displayed and selecting another size from the drop down menu.
- **Mat. Price (Material Price)** displays the default cost for this item. Changes to the material price for this item can be made here by clicking into the cell and typing the change. material prices displayed in the Detail Area come from the bid Item record. If you highlight the price and enter a new value, a pop up dialog will ask to update the Master Material price. Selecting 'Yes' will update the price within the current bid and update the Master price. Selecting 'No' will update the current Bid but the Master price will remain unchanged.

- **Per** displays the method of pricing the item.
- **Lab Cost** displays the cost of labor associated with this item.
- **Wage Type** shows the wage type applied to the labor.
- **Crew** displays the number of men in a crew required for the production selected, in the form of a button. Click the button to see what payroll classes are assigned to the crew.
- **% Base** displays your adjusted labor as a percentage of the original labor default. Any percentage above 100% of your base default rate is flagged in red while less than 100% is flagged in blue. This column allows you to change your base default production rates with a percentage entry. When a labor item is entered into the condition, it defaults to its base production rate, represented as 100%.
- **Qty/Day (Quantity/Day)** shows the quantity being produced per day or hour.
- **Units/Day** shows the pieces being installed per day or hour.
- **Crew/Day** shows the time required to install the condition quantity based upon the production entered.
- **Mat Total (Material Total)** provides a line item material cost total based upon the quantity x the unit material price.
- **Lab Total (Labor Total)** provides a total amount needed for the labor in the item.

Detail Controls Area

The Condition Detail has several buttons located at the bottom of the dialog for you to use.

- **Modify Item** button opens the bid **Item Detail** for the highlighted item. The **Item Detail** allows you to edit the item information from material pricing to labor pricing. Editing the bid Item Detail, will only affect the item for this bid. It will not change the item at the database/ master level.

For details about the Item Detail dialog see *Section 5, Master Menu Items*. The bid level and master level dialogs have the same properties. They just store information in different areas.

NOTE: Master level dialogs are labeled (Master). Changes made at a Master dialog will change all present and future bids. Changes made at the bid level will only affect the current bid.

- **Insert** button inserts a new line for another item.
- **Delete** button deletes a highlighted Item.
- **Move up** button moves a highlighted item up one line.

- **Move down button** moves a highlighted item down one line.
- **Assembly** button opens the **Condition Assembly List (Master)** dialog. This dialog contains a library of condition templates that contain materials and labor.
- **Labor Adjust** button accesses the **Labor Adjust** dialog that allows you to change labor production on a single labor code or across all labor codes.
- **Print** button gives you the option to print the current, selected or all conditions; and show details, section markups or notes.
- **Next** button views the next Condition Detail in the Conditions list
- **Previous** button views the previous Condition Detail in the Conditions list
- **Verified** box allows you to keep track of your progress setting up that condition. You have an option of either placing a check mark in the box with a click or clicking it again will fill the box. The check mark will be displayed in red on the Conditions tab next to the condition. If the box is filled, it will be represented with a black check mark on the Conditions tab. Use this feature for your tracking needs.
- **Copy & Paste** buttons will copy and paste conditions. You can use these buttons between conditions listed on your Conditions tab.

Assemblies

An **Assembly** is a saved group of items that can be used repeatedly. Once an assembly is created, using it is as simple as selecting it from a list. All of the saved items that it contains will fill in the appropriate fields. For example, creating a condition assembly saves a template of Condition Detail Items.

No matter when an assembly was originally saved, material and labor pricing will always reference the bid records first. If they are not already used in the bid, they will come from the Database (Master) records. This ensures that your bid always references the most current prices.

With Quick Bid, you can create three different types of assemblies: **Condition**, **Equipment** and **Other Assemblies**.

Condition Assemblies

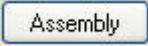
A **Condition Assembly** holds a saved set of material and labor items used to build a condition. It is like a template of Items that you select to fill in your Condition Detail. You can save any conditions as an assembly.

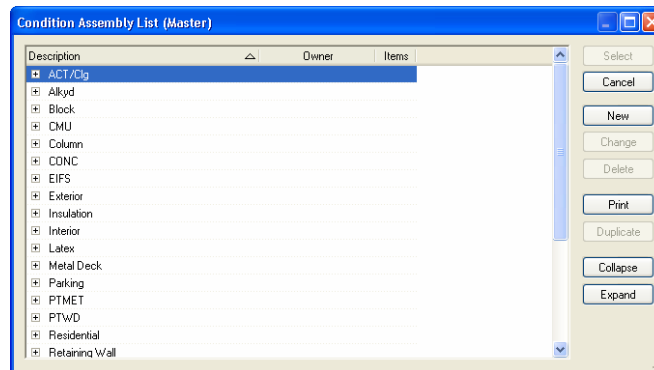
The following items detail some important considerations for working with **Condition Assemblies**:


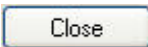
- Condition Assemblies save production values rather than money. If a labor item is saved with a production rate of 1000SF, the same production will default to all future conditions. This method assures you that if labor rates are modified, the assemblies automatically update to the new rates (i.e. new labor rate divided by 1000SF = new unit price).
- When a condition is saved to an assembly with the original default heights for material items, that assembly may be used for any similar condition regardless of height. In other words, you can save a wall at 10' but use the same assembly to build a 14' wall. The material quantities will recalculate correctly. However, labor will default at the same production rates that were originally saved to the assembly. So labor should be readjusted each time an assembly is used in a new condition.
- Assemblies remember proportional values for material items that have their quantity method set up as a direct entry. For instance, a condition may be set up with a quantity of 1000 SF. A direct entry item such as metal trim is entered and assigned an item quantity of 100 LF. The assembly will remember that relationship of 1 to 10 and apply that same ratio to future conditions.

Creating Condition Assemblies


Condition Assemblies can be created in either the **Condition Detail** dialog or the **Condition Assembly Detail (Master)** dialog. The procedures for creating assemblies are the same for both dialogs.


1. Before you can create an **Assembly**, you will need to enter all of the required items you want to include in that assembly. See *Condition Detail*, in this section, for information about entering material and labor items.
2. Once you have entered the necessary items, click . The **Condition Assembly List (Master)** dialog appears.



3. Click . If you entered the items in the **Condition Detail**, the **Condition Assembly Detail (Master)** dialog appears and is populated with all of the items you entered on the **Condition detail**.
NOTE: No matter where you entered the items, you will end up on the Condition Assembly Detail (Master) dialog.
4. Enter or modify the condition **Name** with a unique description for the assembly.
5. Assign a **Type** to the condition. Because the **Condition Assembly List** is presented in an expandable tree format, assemblies are indexed into groups through the **Type** field.
6. Enter the **Estimator** or use the **Lookup** button to pick from a list.
7. You may want to make important modifications to the condition assembly like entering more detailed notes regarding the use of the assembly or changing the order in which the items appear in the Detail Area to reflect the way the condition is built.
8. When you are done entering or modifying information, click  to accept and save the new assembly.

Using Condition Assemblies

1. To insert an assembly into a condition, click  on the **Condition Detail** dialog. The **Condition Assembly List (Master)** dialog appears.
2. Click on the plus sign (+) next to an **Assembly Description** to expand the list under that **Description**.

3. Double-click an assembly or click  to choose the assembly. The assembly will appear in your **Condition Detail**.

NOTE: It is always a good idea to verify that labor costs, material costs, layers, etc. are accurate.

NOTE: If you re-enter the **Assembly List** from the **Condition Detail** and choose **Select**, a dialog will appear called **Assembly Select**. This dialog is requesting direction as to where it should insert the selected assembly into the current **Condition Detail**. If you click **Append**, the selected assembly will be added to the condition (even if there are existing items previously entered). If you click **Replace**, Quick Bid will remove the existing Item(s) and replace it with your selected assembly. If you click **Cancel**, the Assembly list will be closed and no changes will be made at the **Condition Detail**.


Equipment Assemblies

An **Equipment Assembly** can contain multiple items or it can be a single item. **Equipment Assemblies** are stored in the database and are available for use in any bid in that database. Using **Equipment Assemblies** can save a great deal of time when creating your bids.

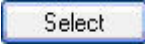
Creating Equipment Assemblies

1. From the **Master** menu, click **Equipment Assemblies** or click the **Equip** tab.
2. Highlight each piece of equipment that you want to include in the assembly.

NOTE: To select multiple items, press Ctrl on your keyboard and while holding this button down, make your selections.

3. If you have no pieces of equipment created in your bid you will need to create them. See [Section 4 Equip Tab](#) for information on creating equipment records.
4. Once you have made your selections, right-click anywhere in the **Equip** tab window and select **New Equipment Assembly** from the menu. The **Equipment Assembly (Master)** dialog appears.
5. Give your assembly a name and enter an **Owner** or click the **Lookup** icon  to select from a list.


Using Equipment Assemblies

1. Click the **Equip** tab.
2. Right-click anywhere in the **Equip** tab window and select **Insert Equipment Assembly** from the menu or press **Insert** on your keyboard.
1. Click on the assembly or assemblies you want to add to the bid and click  to return to the **Equip** tab. Your assemblies along with their attributes will be added to your bid.

Other Assemblies


An **Other Assembly** can contain multiple items or it can be a single item. **Other Assemblies** are stored in the database and are available for use in any bid in that database. Using **Other Assemblies** can save a great deal of time when creating your bids.

Creating Other Assemblies

1. Click the **Other** tab.
2. If you have no pieces of equipment created in your bid you will need to create them. See [Section 4, Other Tab](#) for information on creating Other records.
3. Highlight each item that you want to be included in the assembly.
NOTE: To select multiple items, press Ctrl on your keyboard and while holding this button down, make your selections.
4. Once you have made your selections, right-click anywhere in the **Other** tab window and select **New Other Assembly** from the menu. The **Other Assembly (Master)** dialog appears.
5. Give your assembly a name and enter an **Owner**, or click the **Lookup** icon  to select from a list.

Using Other Assemblies

1. Click the **Other** tab.
2. Right-click anywhere in the **Other** tab window and select **Insert Other Assembly** from the menu or press **Insert** on your keyboard.

- Click on the assembly or assemblies you want to add to the bid and click  to return to the **Other** tab. Your assemblies along with their attributes will be added to your bid.

Markups

Markups come in three varieties in Quick Bid: **Section Markups**, **Additional Markups** and **Indirect Expenses**. At the bid level, all of these markups are created in the **Markups** tab and can be modified in the **Markup Details** dialog for each markup.

Section Markups

Section markups refer to overhead, profit, tax, burden, and escalation applied to each section used in the bid.

- Overhead** refers to general operating expenses. Overhead is applied as a percentage to your total costs (material, labor, indirect costs, sales tax and labor burden). You may prefer to include Overhead in your Profit line, thus no entry would be made in the Overhead field. Overhead is considered part of your cost and is marked up with profit.
- Profit** You can enter a percentage of profit you want to apply to material, labor, equipment, and other costs. Profit is applied to the Overhead cumulatively. On the Markup Detail, there are controls adjacent to the Indirect costs buttons (stock, clean, etc.) that turn off the Overhead and Profit for each of these expenses.
- Tax/Burden** The word Tax refers sales tax on material while Burden refers to taxes, fees, and insurance on labor. Tax can be changed directly in the Markup Detail dialog on Material, Equipment and Other. However, Burden can only be changed at the Payroll tab.
- Escalation** is a global modifier for costs associated with material, labor, equipment, and others and is job specific. Escalation is expressed as a percentage and may be entered as a positive or negative value. Sales taxes are applied to escalation values that are assigned to materials. However, labor burden is not applied to labor escalation. Overhead and Profit can be applied to escalation. Escalation is an added cost to your bid and does not change unit cost pricing at the Condition Detail. It will, however, affect the selling price of each condition.

Section markups can be calculated by two methods in Quick Bid: Straight or Gross Margin.

- Straight Markup** multiplies cost by a set percentage. $\text{Cost} (100\%+X\%) = \text{Total}$

- **Gross Margin Markup** takes bid cost and divides it by the remainder of 1 minus the markup percentage. $\text{Cost} / (1 - \text{GM}\%) = \text{Total}$

Adjusting Section Markups

1. Click the **Markups** tab.
2. Click on the section you want to make adjustments to and either right-click and select **Show Markup Detail** from the menu or hit **Enter** on your keyboard. The **Markup Detail** dialog appears.

Markup Detail - 2000 Misc. Bid Items

View options: Select all bid sections Include accepted alternate sections Markup Method: Straight

M/U	Material	Labor	Equipment	Other	Total
Net Totals	150	0	0	0	150
<input checked="" type="checkbox"/> Stock	0	0	--	--	0
<input checked="" type="checkbox"/> Clean	0	0	--	--	0
<input checked="" type="checkbox"/> Supervision	0	0	--	--	0
Escalation	0.00%	0.00%	0.00%	0.00%	0
Tax/Burden	8.25%	0.00%	0.00%	8.25%	12
<input checked="" type="checkbox"/> Per Diem	0	0	--	--	0
Sub Totals	162	0	0	0	162
Overhead	10.00	10.00%	0.00%	10.00%	16
Profit	15.00%	15.00%	0.00%	15.00%	27
Section Totals	205	0	0	0	205

Buttons: Add Notes, Previous, Next, OK, Cancel


3. Make your new entry and hit **Enter** on your keyboard. All other fields affected by your change will be updated.
4. Use the **Previous** and **Next** buttons to make adjustments to the previous and next sections listed on the Markups tab.
5. Clicking **Add Notes** or pressing the **F2** key on the keyboard will bring up the notes section. Type notes that relate to the markups for your reference.

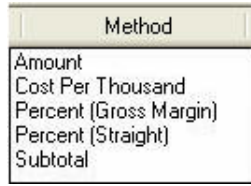
NOTE: Only those fields with white backgrounds can be adjusted.





Additional Markups

Additional Markups generally refer to fees and charges applied to bid totals. **Additional Markups** are sometimes referred to as Bid Markups. In Quick Bid, however, the term **Additional Markup** is used. You can include anything you like here. Many estimators enter special fees, insurance, bond expenses, etc. as **Additional Markups**.

Creating and Adjusting Additional Markups

1. On the **Markups** tab, click . The **Configure Additional Markups** dialog appears.
2. Enter a **Description** for your markup. You can call it whatever you like.
3. Enter a Method or click the arrow to select from a list.



- **Amount** - Adds a specific amount to your bid total.
 - **Cost Per Thousand** - Adds an amount to every 1000 dollars of your **Apply To** field.
 - **Percent** - Adds a percentage to your bid total based on your **Apply To** field.
 - **Subtotal** - Creates a subtotal entry at the **Markups** tab that totals all costs listed before it.
4. Enter an **Apply To** (result) or click the arrow to select from a list.
 5. Enter a **Value**.
 6. Click  to return to the **Markups** tab window, or click  to add another additional markup. You can add as many additional markups as you like to your bid. Quick Bid allows you to add these markups and then decide whether you want to apply them to the bid or not.
- To apply all of your **Additional Markups** to a bid, click  in the **Configure Additional Markups** dialog. All of the markups will be applied to your bid.
 - To use default settings and not the additional markups, click  and none of your additional markups will be applied to your bid.

- To save your additional markups configurations as defaults click .

NOTE: If you are a self performing contractor and you have entered Subcontractors to your bid, your markup or profit on subcontractors must be added in the Configure Bid Totals grid. Likewise, if you are a general contractor, your fees or profit are entered there and would apply to all your bid costs.

Indirect Expenses

Indirect Expenses refer to expenses related to **Stock, Clean, Supervision** and **Per Diem**. Each indirect expense category has its own dialog in which you are able to add and modify the figures related to each expense.

Adjusting Indirect Expenses

1. Click the **Markups** tab.
2. Click on the section you want to make adjustments to and either right-click and select **Show Markup Detail** from the menu or hit **Enter** on your keyboard. The **Markup Detail** dialog appears.
3. Make your new entry and hit **Enter** on your keyboard. All other fields affected by your change will be updated.

NOTE: Only those fields with white backgrounds can be adjusted.

Section 10


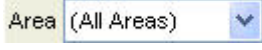

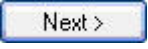
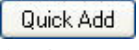
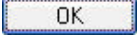
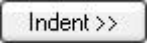




**Areas, Sections, Sets &
Chained Items**

Bid Areas

Bid Areas are defined locations within a single bid like buildings, floors, levels, wings, phases, zones, or rooms that are common to separate locations. For instance, for a multi-story building, the separate floors may be exactly the same. Creating a Bid Area allows you to perform the takeoff once and then apply it to multiple locations.

Area names generally refer to the contract drawings. The estimator has full control over what areas are called.

Quick Bid uses Bid Areas to calculate accumulated costs charged to these specific locations. Reports can then be generated to display information and quantities for each specific building area that has been used. Follow the steps below to create a bid area.

1. To work with Bid Areas, click  next to the **Area** dropdown menu  on the Image tab or select  on the Cover Sheet. The **Bid Areas** dialog appears.
2. To add a new area, select  and enter the name of your area.
3. To add multiple subsets to an area, such as multiple floors to the west wing below, select  and select a name from the Area Quick Add dialog drop-down list, or type in the name for the area you want to create. This is an example of having an area within an area.
4. Type a range in the **From** and **To** fields such as 1 to 5 (see below) and click .
5. To indent or outdent an area to assign it to a parent area, highlight the desired area and select either  or  directly beneath the parent area you want to assign it to.
6. To move areas up or down in the list, select  or  as desired.
7. To delete an area, highlight the desired area and click .

Bid Areas can be grouped in a logical manner with parent child relationships. You can make an area a subordinate of a larger area by Indenting and Outdenting when necessary. An example of this would be if you had a 10 story building and 8 units on each floor. You would first use Quick Add to create your 10 floors but then create 8 units within each floor. This would allow more specific data to be derived from your reports. Unit specific costs and estimates could be generated per unit using this method

NOTE: A plus sign (+) next to any Area Name indicates that there are subordinate areas within that defined area.

Typical Areas


A project can have several conditions that, when combined together, create a typical area like apartment units, hotel suites, townhouses, lobby areas, restrooms, etc. The Typical Area feature allows the estimator to assign a count for each typical unit within a building or project and only have to perform the takeoff for one unit. When properly entered, Quick Bid will split out your reports for each typical unit, floor, building, etc. or report a grand total for the bid.

Since a Condition Detail is restricted to just one height, you may consider tagging your Typical Areas with a height value. Example: Apt. 2B – 8-6" , Apt. 2B – 10-". This will help you if your project has multiple deck heights or if specific wall types require separate conditions of each height of the same wall. Be mindful of the heights when entering these quantities. When this step is completed, Quick Bid will have a total count of each Typical Unit, a breakdown for each floor and subsequently, a total for each area.

To set up an estimate using Typical Areas, you must first set up Bid Areas. Note that you can have multiple **Typical Areas** for a given **Bid Area**.

1. To create **Typical Areas**, from the **Bid** menu, select **Show Typical Areas** or click on the **Cover Sheet**. The **Typical Areas** dialog will appear.

Areas	North Elevation	South Elevation
[-] East Elevation	2	
Floor 1	3	
Floor 2		
Floor 3		
[+] South Elevation		
Warehouse		
West Elevation		
North Elevation		

2. Click  and assign a name to your typical area in the **Typical Area** dialog that appears.
3. The **Typical Area** will appear in a column next to the **Bid Area** column.
4. You can then enter the number of times your **Typical Area** appears in each **Bid Area**.

Section 10 – Areas, Sections, Sets & Chained Items

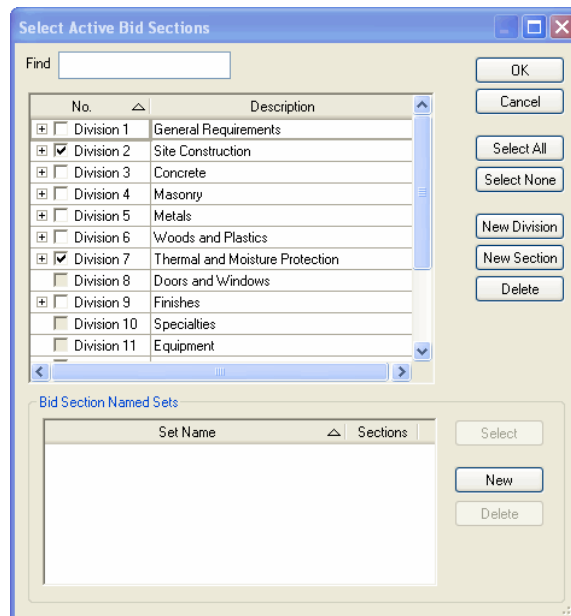
NOTE: Use the Fill Down and Fill Right buttons to repeat counts down columns and across rows.

Since a Condition Detail is restricted to just one height, you may consider tagging your Typical Areas with a height value. Example: Apt. 2B – 8-6" , Apt. 2B – 10-". This will help you if your project has multiple deck heights or if specific wall types require separate conditions of each height of the same wall. Be mindful of the heights when entering these quantities. When this step is completed, Quick Bid will have a total count of each Typical Unit, a breakdown for each floor and subsequently, a total for each area.

Active Bid Sections

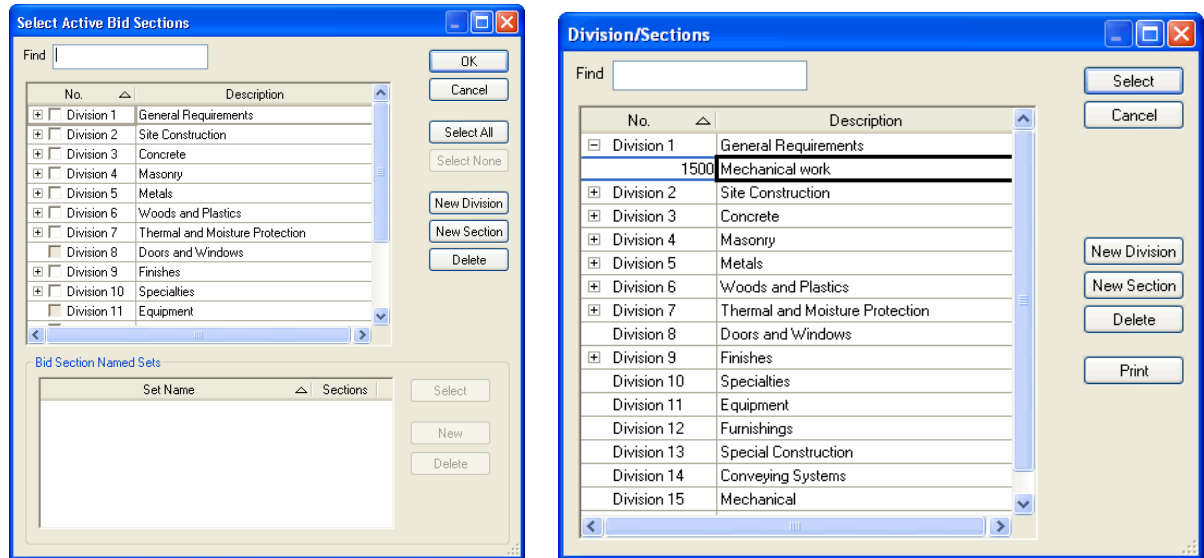
Quick Bid provides an opportunity for General Contractors to preset a scope of CSI sections for a specific job. In fact, templates may be set up for different categories of work. Activated sections will be displayed in numerical order by Division at the Subcontractor list (Subs tab). This display allows the Contractor to quickly check the Subs list on bid day to determine if there is a need to plug a number or determine if there is full coverage from his subs.

1. From the **Bid** menu, click the **Select Active Sections**. The **Select Active Bid Sections** dialog appears.



2. Check every division or section you want to activate.



This is a select dialog. Select dialogs are available at the bid level. You can add and delete divisions and sections and select them for your bid. Select dialogs will always have a **Select** button at the top.



NOTE: The Divisions/Sections dialogs look and act similarly. The only difference is that at the bid level, you are able to select a Section for use in a bid, whereas in the Master level, you are viewing the Master record. Any divisions or sections you create at the Master level will be available to all bids in the database. To include a section, however, you must be in a bid.

Named Sets

If a set of bid sections are common to every bid, you can save them as a **Named Set**.

1. To save a set of sections as a named set, click  at the bottom of the **Select Active Bid Sections** dialog.
2. Enter a name in the field that appears.
3. After you have made your selections and created named sets, click  to exit the dialog.

Chained Items

A **Chain** is a group of related material items bound to a single **Item** code. At the **Condition Detail** a Chain of Items allows you to type one Item code which will automatically pull in additional Item codes. For instance, entering the acoustical grid code DX24 at the Condition Detail will bring in a total of nine different Items.

To enter a Chain, click the NEW button and type in or select an Item from the Items List. The Items displayed on the menu come from your Master Items List and are not uniquely built for the Chain applications.

Entering a new Code also brings in the Item's description. If the new Item has multiple sizes or if you have selected an Item with styles, then you may enter that specific information at the Size/Style column using the drop down menu.

Having multiple Items chained together in an Item Detail is a great feature that can allow you to enter one Item Code which will in turn bring multiple items regarding materials and/or labor in one easy step.

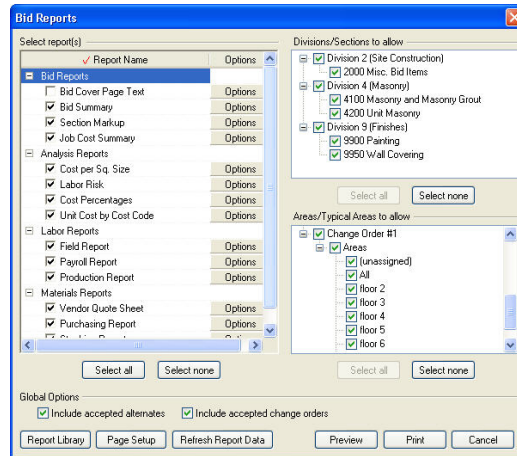
Section 11


**Reports, Exports, Proposals &
eQuotes**

Reports

Quick Bid provides a multitude of reports to view your bidding project. The reports are sorted into four categories: **Bid Reports**, **Analysis Reports**, **Labor Reports** and **Materials Reports**. Reports can be as detailed or as general as you desire. The **Options** that you choose to include will help determine what each report will include.

NOTE: All Quick Bid reports are generated using Crystal Reports™ software.



1. From the Bid Toolbar, click . The **Bid Reports** dialog will appear. See [Bid Report Dialog](#) in this section, for more information about each section of this dialog.
2. To choose which reports to print, which divisions/sections to allow, and which areas/typical areas to allow, place a check in the box next to the report, division/section, and area/typical area.

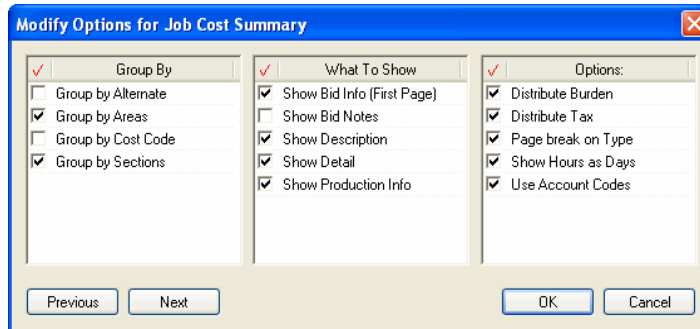
NOTE: These categories can be expanded or collapsed by clicking the plus sign (+) or the minus sign (-) respectively.


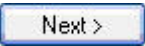

NOTE: Use  or  buttons in each section to select either all or none.

3. Choose to include accepted alternates and/or change orders by placing a check in the boxes under **Global Options**.
4. Set up your page, preview your reports, refresh report data or print reports by selecting the appropriate button. See [Bid Reports Dialog](#) for more information.

Bid Reports Dialog

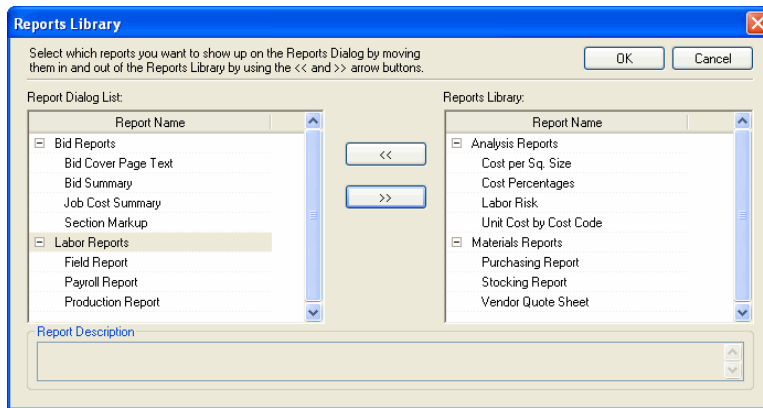
- **Select Reports** field lists all Quick Bid reports, and option boxes for modifying the content of reports.
 - Options button will open the **Modify Options** dialog for each report. This dialog is similar for all reports, however, options will vary depending on what report you are using.



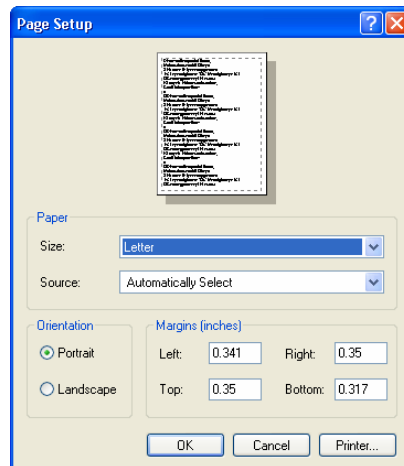
- Place a check in the box next to the option(s) you want to include on your report.
- Use the  and  to scroll through the reports lists.
- Click  after you have made your selections to return to the **Bid Reports** dialog.
- **Divisions/Sections to allow** field lists all Divisions and Sections in use in the bid. You may select which Divisions or Sections to include in your report by checking and unchecking the boxes in the field.
- **Areas/Typical Areas to allow** field lists all Areas and Typical Areas in use in the bid. You may select which Areas and Typical Areas to include in your report by checking and unchecking the boxes in the field.
- **Global Options** boxes give an option to choose to include accepted alternates, accepted change orders, or both on you reports.
- **Report Library** button opens the **Reports Library** dialog. Choose which reports you want to appear in the **Bid Reports** dialog by moving them in and out of the Reports Library. Those reports in the Reports Library will not appear in the Bid Reports dialog. You can choose all the reports in a category or certain reports.

The following example shows that all of the Analysis Reports will be left off of the Bid Reports dialog, along with the Purchasing Report from the Materials Reports category.

Section 11 – Reports, Exports, Proposals & eQuotes



- **Page Setup** button opens the **Page Setup** dialog. The options selected here act as the reports printing instructions.



- **Refresh Report Data** button is an interface with the **Custom Reports** feature. See [Custom Reports](#), in this section, for more information.
- **Preview** button will allow you to view the report on your screen.
- **Print** button will open the **Print** dialog and allow you to print reports.
- **Cancel** button will close the **Bid Reports** dialog

Bid Reports

There are three reports in the **Bid Reports** category. These reports provide information about selling price, markup structure, and cost by cost code.

- **Bid Cover Page Text** will print the text entered on the **Cover Sheet** dialog, **Preferences** tab.
- **Bid Summary** report shows a list of all conditions with their height, quantities, count and unit selling prices for material and labor. You can display the conditions by area, or by CSI section with sub-totals or grand totals. You can also show duration expressed in hours or days. It lists the selling price of items assigned at the **Subs**, **Equip** and **Other** tabs.
- **Section Markup** report displays labor and material costs with indirect expenses, sales tax on materials, burdens on labor and markups applied to the cost. The cost information displayed is derived from the Condition Details.
- **Job Cost Summary** report shows a complete breakdown of all labor and material costs by cost code. A labor cost is summarized by labor code showing the quantity, unit cost, amount and production expressed in time by line item. Material cost is summarized by category showing the quantity, unit cost and amount.

Analysis Reports

There are four reports in the **Analysis Reports** category. These reports provide information about material and labor costs.

- **Cost per Sq. Size** report allows you to compare the unit price of this bid against historical cost data. This report is created by taking the total selling price of the bid and dividing it by the total square size, which results in a unit price per square size. The report options allow you to view the entire project or break down the report by area locations. This report requires the square area to be entered at the bid **Cover Sheet** for either the whole building or for each individual area at the **Bid Areas** list.
- **Labor Risk** report allows you to evaluate the percentage of labor risk by comparing your burdened labor against your combined overhead and profit applied to both material and labor. In other words, gross markup vs. gross labor cost. The percentage resulting from this calculation may be compared to your historical data of similar jobs.
- **Cost Percentages** report splits up the selling price for the basic components of the bid and displays a percentage for each component against the total selling price. This report separates the amount in your bid for material, labor, subs, equipment and other charges; and expresses these amounts as a percentage of the total bid.

- **Unit Cost by Cost Code** report allows you to evaluate a unit selling price based on the quantity of a specific group of materials. This report displays all your material quantities by material cost code. The total bid price is divided by the quantity of a material group to extract a unit selling price per unit. Since estimators key on different materials for this ratio, the report lists all material cost codes but they have no relationship to each other.

Labor Reports

There are three reports in the **Labor Reports** category. These reports provide information about all aspects of labor in a bid.

- **Field Report** provides a full breakdown of the bid by condition. Each condition shows material quantities and sizes. Each condition shows labor by labor code, crew size, production per day/hour, and total time required to complete that labor code.
- **Payroll Report** provides a full breakdown of labor by pay class. Each pay class shows the base rate, gross burden rate, total hours, fees, insurance, taxes and the gross pay.
- **Production Report** is similar to the Field Report except that it breaks down labor only by Labor Cost Code for each condition.

Materials Reports

There are three reports in the **Materials Reports** category. These reports provide information about all the materials in a bid.

- **Vendor Quote Sheet** provides a list of materials to be sent to a supply yard for a material quote. The report indicates quantities and sizes and has a field for your vendor to insert pricing and a date to guarantee the prices through.
- **Purchasing Report** provides a list of all materials required to complete the bid.
- **Stocking Report** provides a list of materials needed to stock the job. Note that no money is shown on this report.



Custom Reports

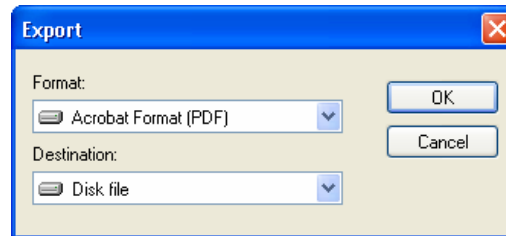
User defined Crystal Reports can be created to fit individual customer needs. Refer to the [*Custom Reports Supplement*](#) to learn how to create and store .rpt files in the Quick Bid Report Library.

Call your On Center Software sales representative to explore this additional reporting feature.

Exporting Reports


Quick Bid reports can be exported to other programs such as MS Word, MS Excel, Adobe Acrobat, etc. from the **Bid Reports Preview** dialog.

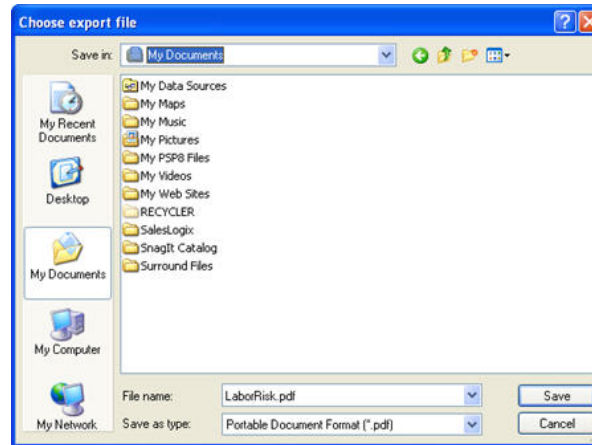
1. Select a report in the **Bid Reports** dialog.
2. Click the  button. The **Bid Reports Preview** dialog appears.
3. Click the **Export Report** icon  in the upper left corner of the screen. The **Export** dialog appears.

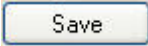


4. Select the format you want to export your report in from the **Format** field by clicking the drop down arrow for the list.
5. Select the destination for your export from the **Destination** field by clicking the drop down arrow for the list.
 - **Application** - This selection will allow you to open the export file in the chosen format. You can then save or e-mail the file as needed.
 - **Disk file** - This selection will allow you to save the export file to a location on your computer's hard drive.
 - **Exchange folder** - This selection will allow you to save the export file to an exchange folder such as MS Outlook.
 - **Lotus Domino** - This selection allows the export file to be saved to a Lotus Domino server for saving or e-mailing.
 - **Lotus Domino Mail** - This selection allows the export file to be e-mailed directly vial Lotus Domino E-mail.
 - **MAPI** - This selection will allow you to send the export directly via e-mail to most mail recipients regardless of the type of e-mail application being used.

Section 11 – Reports, Exports, Proposals & eQuotes

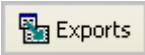
6. Click . The **Choose export file** dialog will appear.
7. Choose which pages of the report you want to export, then click . The Choose export file dialog appears.



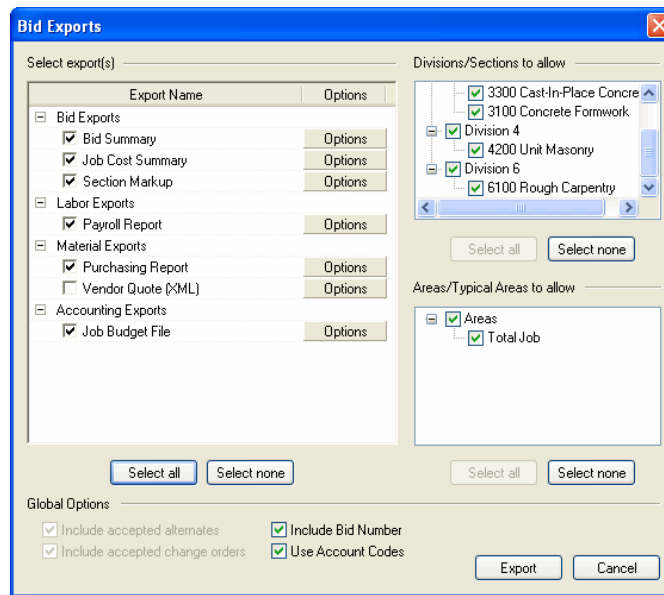
8. Browse to the location to which you want to save the export and click . The export is now saved in this location in the file format you chose.

Exporting Bid Information

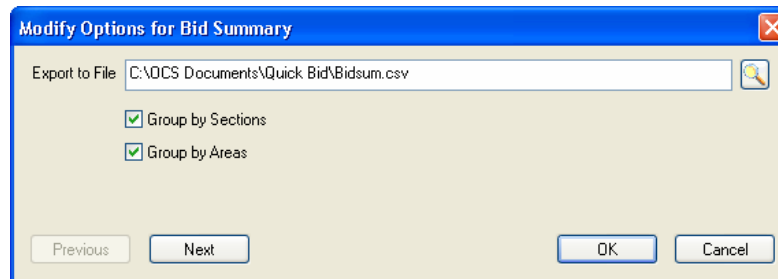
Quick Bid allows you to export bid information without having it in a report. It exports the information into an Excel Spreadsheet. This is recommended when using data for an accounting software. The setup for **Exports** is similar to the setup for generating the reports. Only certain reports information is available for export. See the **Bid Export** dialog below for a list.


1. Click on the bid and then click the **Exports** button  or

From the **Main** menu, **Bid > Generate Exports**. The **Bid Exports** dialog appears.



2. Click on the report you want to export, and click its **Options** button. The **Modify Options for** dialog appears.



3. Browse to the location you want to export the file to by using the **Lookup** button, and click . The file will appear in your location as a .CSV (Excel) file.

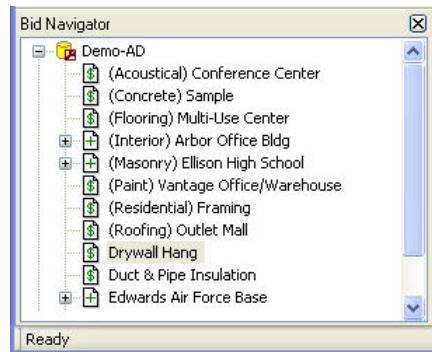
Proposals

With Quick Bid, you are able to generate bid proposals with all the information you need. The proposals are generated using MS Word .dot (template) files. There are three templates to choose from, and you can use them at any time. You can also edit a template, and save it under another name to fit your specific needs. Quick Bid will auto populate the necessary fields with information from the program.

NOTE: For Quick Bid to see your templates, they must be saved in the Template subdirectory of the Database Folder. This should be located at C:\OCS Documents\Quick Bid\Templates, by default). In addition, when editing a template, makes sure you spell the names of the fields correctly. If a field name is misspelled, Quick Bid will not recognize the field and it will not auto populate.

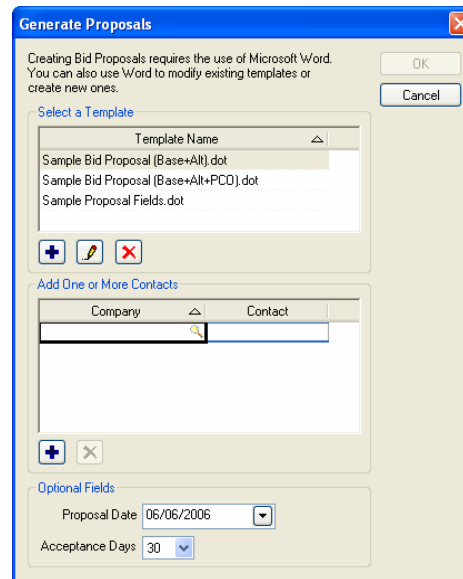
Generating Proposals




1. Click on the bid in the Bid Navigator.



2. Next, click the **Proposals** button  or

From the **Main** menu, **Bid > Generate Proposals**. The **Generate Proposals** dialog appears.




3. Click once on the proposal template you want to use. **DO NOT DOUBLE CLICK.**
4. Enter a contact or click the **Lookup** icon  to select from a list.
5. Click  to add a contact if needed.
6. Once you have added your contacts, click  to generate the proposal. The proposal will open in your default word processing program, MS Word for example. Once it opens, print the proposal from that program, or save it on your computer or network and e-mail it.

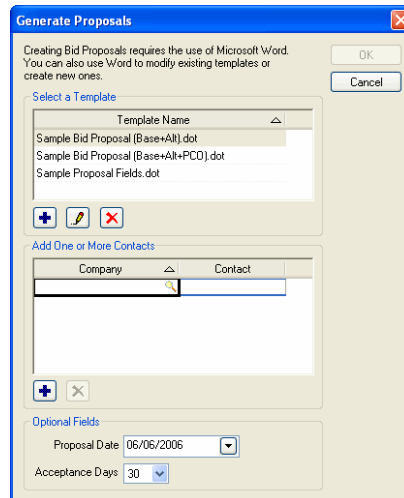
NOTE: If you select multiple contacts, Quick Bid will generate a separate proposal for each.

Editing Proposal Templates

Proposal templates may be modified at any time. You can add and delete information, copy and paste fields from one location to another, change the layout or look of the template, and modify the template in any way that you need.

1. Click the **Proposals** button  or

From the **Bid** menu, click **Generate Proposals**. The **Generate Proposals** dialog appears.



2. Double-click on a template in the **Select a Template** field. MS Word will open the template file.
3. Modify the template as needed.
4. When you have made all the needed changes to the template, from the **File** menu, click **Save As**. The **Save As** dialog appears.
5. Enter a name for you template and make sure that it is being saved in **C:\OCS Documents\Quick Bid\Templates**. **NOTE:** Always rename your modified template so that you always have the original template as a backup.
6. The new template will appear along with the original templates in the list.

NOTE: Each field on a proposal template pulls information from a bid. For a detailed description of the fields, see [About Proposal Template Fields in Program Help](#).

eQuotes

In partnership with **Gypsum TodaySM**, a leading source for information in the North American construction industry, the **eQuote** feature compiles the information on the **Materials tab** and creates a material quote request that is sent to participating suppliers to view and bid.



Register online at www.gypsumtoday.com to establish this time saving service.

NOTE: You will be given a URL Address, User ID and Partner ID from Gypsum Today. These will need to be stored in Quick Bid to activate this feature.

Settings eQuotes

1. From the **Main** menu, select **Tools > eQuote Settings...** The **eQuote Settings** dialog appears.



2. Enter the **Address**, **User ID** and **Partner ID** you received from Gypsum.
3. Click . The **eQuote** button  will now display on the **Bid toolbar**, and the **Send eQuote Request** option will be available from the **Bid menu**.

Sending eQuotes

The **eQuote** includes the **Bid Number**, **Job Name**, **Job Site Name** and **Address**, and all the information from the **Materials tab**. This information is required to assemble your quote package. eQuotes can be sent from the original bid, an alternate or a change order.

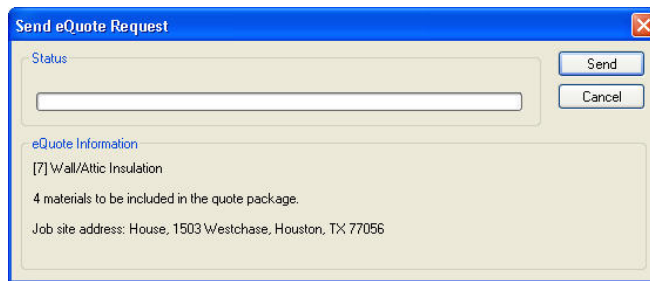
NOTE: Make sure to have all required information up-to-date and stored in Quick Bid. The program will not allow the quote to send without this information. If information is incomplete, an error message will be triggered letting you know what is missing.


Section 11 – Reports, Exports, Proposals & eQuotes

1. From Main menu select **Bid > Send eQuote Request**, or

Click  on the **Bid toolbar**.

2. From the **Send eQuote Request** dialog, click .



- The **Status** area will show the progression of the sending process. A confirmation message will be displayed in the Status area when the process is complete.
- The **eQuote Information** area lists the information contained in the quote. Verify the information is correct before sending.
- The  button can either cancel the process before it starts or during the process.

3. Once the process is complete, click  to exit the dialog.

Section 12

Quick Bid and On-Screen Takeoff® Interaction

Quick Bid and On-Screen Takeoff Interaction Rules

- On-Screen Takeoff must be version 3.3 or higher to use the interactive bid feature.
- The bids in On-Screen Takeoff and Quick Bid must have the same number of conditions and the same condition numbers to be connected. Conditions link by number and name.
- Create new bids in On-Screen Takeoff.
- Create new and delete old conditions on the On-Screen Takeoff Condition Properties dialog.
- Update condition quantities in On-Screen Takeoff. OST dictates to QB.
- Add or adjust labor, material, and other costs on the Quick Bid Condition Details dialog. The On-Screen Takeoff Labor Codes tab is locked in interactive mode.
- To open the **Quick Bid Conditions Detail** dialog from On-Screen Takeoff, right-click the condition and select **Change Details**.

Interactive Bids

Enable communication between Quick Bid and On-Screen Takeoff.

1. Go to the bid **Cover Sheet** in On-Screen Takeoff
2. Select either **Price Using Quick Bid (interactive)** or **Price Using Quick Bid (manual)**. You must select one of these two methods to link the programs.

NOTE: With Price Using Quick Bid (interactive) your bid updates automatically in real-time. With Price Using Quick Bid (manual) the user initiates the update (see below for instructions).

Price Using Quick Bid (interactive)

- With this method information is automatically updated between the programs.
- This is the preferred method of interaction as it ensures that changes in one program are automatically updated in the other.

Price Using Quick Bid (manual)


- With this method you must initiate the updating of information between the programs. This can be done in either program.

Updating a Bid from On-Screen Takeoff

Update or refresh data between the programs in On-Screen Takeoff.

1. Go to **On-Screen Takeoff**.
2. Select the bid you want to update, and press **F9** or
From the Main menu, **Bid > Refresh Quick Bid**.

Connecting and Disconnecting Bids

1. To disconnect a bid from within Quick Bid, go to the **Bids** tab and right-click on the bid and select **Disconnect from On-Screen Takeoff Bid**, or
Select the bid and click **Bids > Disconnect from On-Screen Takeoff Bid** on the main menu bar.
2. To reconnect a bid to Quick Bid, select the bid on the **On-Screen Takeoff Bids** tab.
3. Go to the **Quick Bid Bids** tab and select the bid you want to reconnect to On-Screen Takeoff.
4. Right-click the selected bid in Quick Bid and select **Connect to On-Screen Takeoff Bid** or
5. Select the bid and click **Bids > Connect to On-Screen Takeoff Bid** on the main menu bar.
6. Enter the **On-Screen Takeoff bid number** in the dialog box that comes up and click  **Connect**.

Note: When reconnect to existing bids, open the bid in On-Screen Takeoff and reconnect from Quick Bid.

Creating and Updating Bids Using *.ost File

Create

1. To create a bid from On-Screen Takeoff, from the **File** menu, click **New > Bid from On-Screen Takeoff**, or

Click the **New** icon  and click **Bid from On-Screen Takeoff**, or

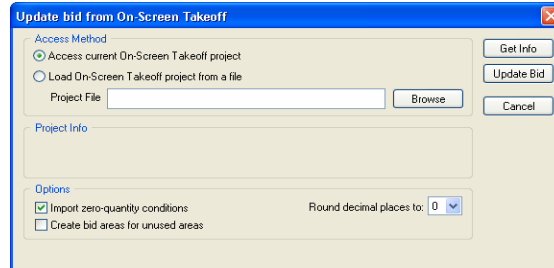
Right-click anywhere in the **Bids** window and select **New > Bid from On-Screen Takeoff**. The **Create bid from On-Screen Takeoff** dialog appears.


Section 12 – Quick Bid & On-Screen Takeoff® Interaction

- Choose the Access Method in which you want to retrieve your takeoff.
 - Only OST v.2.x users can select **Access current On-Screen Takeoff** project with OST open to the current project.
 - All OST users can select to **Load On-Screen Takeoff project from file**. Either type the file path, or click the Browse button to locate it.
- (Optional)** Place a check in the **Import zero-quantity conditions** box. If checked, any conditions in On-Screen Takeoff that do not have any quantity in them, will still appear in Quick Bid.
- (Optional)** Place a check in the **Create bid areas for unused areas** box. If checked, any areas in On-Screen Takeoff that do not have takeoff quantities will still appear in Quick Bid.
- (Optional)** Select a number that Quick Bid will **Round decimal places to**. Your On-Screen Takeoff project may show condition quantities with up to 4 decimal places. If you choose, you can change the number of decimal places that Quick Bid will accept. Quick Bid can also show all 4 decimal places or just one whole round number by selecting decimal places. Your conditions quantities are displayed at the Conditions tab in Quick Bid.

Update

- From the **Main** menu, **Bid > Update from On-Screen Takeoff**. The **Update bid from On-Screen Takeoff** dialog appears.



- Choose your **Access Method** and **Options**, then click .

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