

Request Bids That Include Materials / Labor Check Lists

On the Budget/Bids Worksheet, you can double click on a Cost Code or its Title to open the 'Materials / Labor Check List'. We have a very simple example with 2 lines for Materials Floor/Walls. Of course you might have more materials listed. See Help Documents about Check Lists of Materials and Labor for more info.

Notice that you can place check marks to the left of the materials lines to include the line on a 'Bid Request'.

Then use the button on the window to open the window to 'Prepare Bid Requests'. See next page.

et /Bids Worksheet H11RIVER-11 RIVER RUN-Brown

FRAMING MATERIALS-3 CHS

Materials / Labor Check List (Calculate Budget, Create PO/WO's, Request Bids, or Prepare Selections)

H11RIVER-11 RIVER RUN-Brown 3110 - Materials-Floors/Walls

Cost Code to open Mats/Lab: 3110 - Materials-Floors/Walls

Main and Sub: 3110 Materials-Floors/Walls, 3120 Materials-Floors/Walls, 3121 Frame Mtl-Ex, 3130 Frame Mtl-Ro, 3140 Frame Mtl-Ba, 3149 Framing Mate

Buttons: Add New Check List Line, Check Mark All As Budgeted, Check All None POs to Create POs, Check All To Include on Bid Requests, Select JOB to copy or to view check list (H), View Selected Job's Check List, Copy Entire List From Selected Job-No Qties, View /Edit General Check List for Cost Code, Select GROUP to copy from selected job (None), Copy Group To This List-No Qties, Copy Group To This List-With Qties, Print This List, Buyer Selection List - Est. Costs and Markup, Print All For Job, Buyer Selection List - Marked Up Only, Prepare Bid Requests, Add/Edit VENDORS

| *Group (see note) | Title of Item | Qty UOM | Qty | Footage | *Price UOM | Unit Price | Price By: | Total | Tax Rate | Ttl With Tax |
|--|---|---------|--------|----------|------------|------------|-----------|--|------------------------------|-----------------|
| <input type="checkbox"/> Budget <input type="checkbox"/> Create PO/WO <input checked="" type="checkbox"/> Bid Request <input checked="" type="checkbox"/> Buyer To Select <input type="checkbox"/> Buyer Selected | Select Task STOCK - Lumber SPF Western 2x4x104-58 Stud FJ S4S S-Dry | Pc | 262.00 | 1,572.00 | MBF | \$504.90 | 1,000.00 | \$793.70 | 0.00% | \$793.70 |
| Item Memo--> This is a test of the memo box. Type info about the item here. PO/WO NONE Set PO to None? Double Click PO number to open PO. | | | | | | | | | | |
| <input checked="" type="checkbox"/> Budget <input type="checkbox"/> Create PO/WO <input checked="" type="checkbox"/> Bid Request <input checked="" type="checkbox"/> Buyer To Select <input type="checkbox"/> Buyer Selected | Select Task STOCK - Lumber Trtd Pine 2x4x16 #2 Int Abv Grd Borate Treatment | Pc | 5.00 | 53.33 | MBF | \$700.20 | 1,000.00 | \$37.34 | 0.00% | \$37.34 |
| Item Memo--> PO/WO NONE Set PO to None? Double Click PO number to open PO. | | | | | | | | | | |
| *Price UOM Hint: Type MBF to divide price by 1,000 for Total calc. | | | | | | | | All Lines Totals | \$831.04 | \$831.04 |
| Open Budget Memo | | | | | | | | Send Checked Budget Lines Total To Budget--> | Checked Budget Totals | \$0.00 |
| Create PO/WO From Lines Checked to Create PO/WO--> | | | | | | | | Create PO/WO Totals | \$0.00 | \$0.00 |

*New Group Headings can be typed into the 'Group' field on an Item line. Group Headings can be handy to use as 'Assemblies' for adding groups of items, or to identify suppliers.

Record: 2 of 2

See Previous Page!

| | |
|----------------------|--|
| Print This List | Buyer Selection List - Est. Costs and Markup |
| Print All For Job | Buyer Selection List - Marked Up Only |
| Prepare Bid Requests | Add/Edit VENDORS |

Select Vendors For Bid Requests

3110-Materials-Floors/Walls

The Vendors shown below are ones that are marked as Active AND that have had the currently selected Cost Code assigned to them on the Vendor Setup window. If no vendors are displayed, it means that none were found with these qualifications. To add Vendors to the list, close this window, and use the button on the top right of the previous Check List window labeled 'Add/Edit Vendors'. On the Vendor Setup window, look for the button to 'Assign Cost Codes' to the Vendor.

| | | | |
|------------|------------------------|----------------------|---------------|
| ▶ BUIDISPL | Builder's Display Inc. | Bid Request Wtih Qty | No Quantities |
| MCCOYS | McCoys Building Supply | Bid Request Wtih Qty | No Quantities |
| STOCK | Stock Building Supply | Bid Request Wtih Qty | No Quantities |

This is a very SIMPLE example.

Your Logo Here!

Bid Request

| | |
|--|--|
| <p>REQUESTED BY:</p> <p>Fantastic Builder, Inc. 1000 SOMEWHERE DR. Austin, TX 78704- OFFICE: (111) 111-1111 FAX: (222) 222-2222 EMAIL: CHSSoftware@prodigy.net</p> | <p>REQUESTED FROM:</p> <p>Stock Building Supply 4501 Burleson Road Austin, TX 78744 OFFICE: (512) 444-3172 FAX: EMAIL: pete@anywhere.com</p> |
|--|--|

For work or supplies to be provided at the following property:

PROPERTY: 11 RIVER RUN, City of the Hills, TX

| LOT | BLOCK | SECTION | LEGAL DESCRIPTION |
|-----|-------|---------|---|
| 2 | 5 | IV | Fill in the legal description of the job's location here. |

Take Hwy 290 North and then take the exit for River Run. Turn right on River Run and the site will be 2 blocks on your left.

JOB CODE NUMBER: H11RIVER

3110 - Materials-Floors/Walls

| | Qty | Qty UOM | Footage | Price UOM | TOTAL | Tax % | Total W/ Tax |
|--|--------|---------|----------|-----------|-------|-------|--------------|
| STOCK - Lumber | | | | | | | |
| SPF Western 2x4x104-5/8 Stud FJ S4S S-Dry | 262.00 | Pc | 1,572.00 | MBF | | | |
| This is a test of the memo box. Type info about the item here. | | | | | | | |
| Trd Pine 2x4x16 #2 Int Abv Grd Borate Treatment | 5.00 | Pc | 53.33 | MBF | | | |
| Group Totals | | | | | | | |
| Bid Total | | | | | | | |

After the Bid Request is printed or emailed, and the report is Closed, CHS will pop up a window with the option to start a Vendor Bid line on the Vendor Bids window. See next pages about the Vendor Bids Window.

Do you want to start a Vendor Bid line on the Vendor Bids window that marks when this Bid Request was printed or sent?

YES, Post a line on the Vendor Bids window.

No, Do NOT post the line.

Open Window To Post Bids From Vendors

Task Menu

[View CHS Setup Steps](#)

[Job Budget, Bids, Costs \(JB\)](#)

[Job Status, Scheduling \(JS\)](#)

To post Bids From Vendors, click on 'Job Budgets/ Bids/...' under 'Task Menus' on the Navigation/Home window. On the window that opens, select the job, then click '01-Job Budget/Bids Worksheet'.

Job Costs, POs, COs, Status, and Scheduling Menu

Select Job (Try F4 key)

CLICK on selections below, or enter a selection #->

| Budget/Estimating and Bids | Job Cost and Variance |
|---|-------------------------------------|
| 01-Job Budget/Bids Worksheet | 13-Actual Job Costs-To-Date Reports |
| 02-Estimated Costs at Completion / Estimated Profit / | 14-Job Cost Variance Reports |

When the Job Budget/Bids Worksheet opens, find the appropriate cost code. Use the 'Select Task' field to the left of the cost code to select 'Bids for This Cost Code'. The window shown on the following page will open.

Job Budget /Bids Worksheet

Find HEADING

Find Cost Code

Find Name->

Double click on Cost Code to open Mats/Labor check list.

Select Task (Try F4 Key) **Main and Sub** **Go to Estimated Costs at Completion** Me:

| | | | | |
|-------------|------|---------------|----|-------|
| Select Task | 3150 | FRAMING LABOR | \$ | |
| Select Task | 3150 | Framing Labor | | Frame |

Actual Costs Review For This Cost Code

Bids for This Cost Code

- Budget COs POs and Costs Info Report
- Change Orders (this job and cost code)
- CHECK LIST of Mats/Labor Items for Cost Code
- Delete Line From Budget
- Documents
- General Purpose Notes For Cost Codes
- Memo Notes About Budget Line
- Purchase/Work Orders for this Cost Code
- Selections For Buyer
- SPECS Planning Sheet For Job

Post Bids From Vendors

The 'Bids From Vendors' window can be used to store bids information. Use the button labeled 'Add New Bid Line' to create a new line. See information below screenshot about the fields on the line.

BIDS FOR: H11RIVER-11 RIVER RUN: Brown
 Cost Code-> 3150-FRAMING LABOR
 Chg Order Line-> NONE-CHS PERMANENT LINE

Records are Sorted by Entry Number.

| | DATE | VENDOR | MEAS | QTY | UNIT \$ | TOTAL | Vendor Sales Tax % | TOTAL With TAX | Contingency Percent for Budget | Date Bid Requested From Items Check List Window |
|---------------|--------------------|------------------|---------------------|----------------|----------|----------|--------------------|-------------------------|--------------------------------|---|
| Delete | Selected: 12/14/04 | THOMASK-Kelly TI | Total | 1.00 | 1,400.00 | 1,400.00 | 0.00% | 1,400.00 | 0.00% | |
| Docs | Yes | 1 | Create PO/WO | Internal Notes | | | | TOTAL With Contingency> | 1,400.00 | |
| Delete | Selected: 12/15/04 | ARROYO-Arroyo F | Total | 1.00 | 1,300.00 | 1,300.00 | 0.00% | 1,300.00 | 5.00% | |
| Docs | No | 87 | Create PO/WO | Internal Notes | | | | TOTAL With Contingency> | 1,365.00 | |

Report of Bids Shown on This Screen

Report of All Bids for The Current Job <-Selected Bids Only

All Bids For All Jobs For This Cost Code <-Selected Bids Only

HINT! To create a Purchase/Work Order with a list of Items attached, return to the Budget window and double click on a Cost Code or Cost Code Title to open the 'Check List' of items.

Fantastic Builder, Inc.

Record: 2 of 2

Summary: AVG 1,350.00, AVG 1,350.00, TOTAL SELECTED (with Contingency)-> \$1,400.00, Send Total Selected to Budget

Selected: - Select 'Yes' if the bid on the line is being accepted. The total of lines that have been selected with 'Yes' will display towards the bottom of the window. To send the Total Selected to the budget as the budgeted cost amount for the cost code, use the button labeled 'Send Total Selected to Budget'.

Ent #: - Ignore this field. It is used by the program.

DATE - Enter the date of the vendor's bid. Use 6 digits (2 for month, 2 for day, and 2 for year).

VENDOR - Select the appropriate Vendor from the drop down list. If the Vendor is not set up, use the button on the window labeled 'Add/Edit Vendors'. (See help documents on the Add/Edit Vendors window.)

Post Bids From Vendors - continued

MEAS - Select a measure code. Optional. The default is 'Bid'.

QTY, UNIT PRICE, TOTAL: - Enter the appropriate quantity and unit price. The TOTAL field will be calculated by the program based on Qty times Unit Price. Usually you will just enter the total bid in the Unit Price field and leave the default quantity of one in the Qty field.

Vendor Sales Tax - If the vendor is charging sales tax, enter the sales tax rate in this field as a decimal number. (Example: For 7.25%, enter .0725) The **TOTAL With TAX** field will be calculated by the program based the TOTAL plus the calculated sales tax.

Contingency Percent For Budget - If you would like to add a contingency amount to the bid amount before sending a Selected Bid to the budget, enter a percent for the contingency so the program can calculate the contingency amount. This is used to anticipate waste or loss in your budgeted costs.

Date Bid Requested From Items Check List Window - If Bids are requested from the Items Check List of Material or Labor (as seen previously), the program will record the date that the bid was requested in this field.

Internal Notes - Type whatever notes you like about the bid.

Button: Create PO/WO - If you have selected 'Yes' that the bid has been Selected, you can create a Purchase/Work order from the bid. (See other help documents about creating Purchase/Work Orders.)

Button: Delete - Use this button to delete the bid line. A window will pop up to verify that you want to delete the line.

Reports Buttons - The buttons for bids reports are self explanatory.

Button: Open Window To Select From All Bids For Job - To quickly select bids to send to the budget as budgeted costs, use this button. See next page for more information about this button.

Select From All Bids To Send To Budget

BIDS FOR
Cost Code->
Chg Order Line-

Records are Sorted by

Open Window to
Select From All
Bids For Job

If you have posted bids for various cost codes, you can quickly review all bids for all cost codes for the job, AND select bids to send to the job budget as the budgeted costs.

Open the window using the button on the Vendor Bids window shown here.
The window is self explanatory.

Select Bids To Send To Budget

H11RIVER: 11 RIVER RUN-Brown

Select "Yes" to automatically send the 'Total With Contingency' for the cost code line to the job budget. Only one line per cost code can be selected as Yes using this window. If a line is selected, the other lines for the cost code will be set to "No". To include more bid lines in the total to send to the budget, use the Bid Entry window. To add, edit, or delete bids, use the bid entry window for each cost code.

| Send To Budget | Main Sub | MEAS | QTY | UNIT \$ | TOTAL | Vendor Sales Tax % | TOTAL With TAX | Conting. % for Budget | TOTAL With Contingency |
|----------------|---------------------------------------|-------|------|----------|----------|--------------------|----------------|-----------------------|------------------------|
| No | 1000 | | | | | | | 0.00% | |
| | PERMITS AND FEES | | | | | | | | |
| No | 1010 | | | | | | | 0.00% | |
| | <i>Building Permits</i> | | | | | | | | |
| Yes | 1010 | Total | 1.00 | 4,300.00 | 4,300.00 | 0.00% | 4,300.00 | 0.00% | 4,300.00 |
| | THOMASK - Kelly Thomas | | | | | | | | |
| No | 3150 | | | | | | | 0.00% | |
| | FRAMING LABOR | | | | | | | | |
| No | 3150 | | | | | | | 0.00% | |
| | <i>Framing Labor</i> | | | | | | | | |
| No | 3150 | Total | 1.00 | 1,300.00 | 1,300.00 | 0.00% | 1,300.00 | 0.00% | 1,300.00 |
| | THOMASK - Kelly Thomas | | | | | | | | ere are so |
| Yes | 3150 | Total | 1.00 | 1,400.00 | 1,400.00 | 0.00% | 1,400.00 | 0.00% | 1,400.00 |
| | THOMASK - Kelly Thomas | | | | | | | | |
| No | 3400 | | | | | | | 0.00% | |
| | CONCRETE | | | | | | | | |
| No | 3420 | | | | | | | 0.00% | |
| | <i>Structural Slabs</i> | | | | | | | | |
| Yes | 3420 | Total | 1.00 | 200.00 | 200.00 | 8.25% | 216.50 | 0.00% | 216.50 |
| | TEXASTRL - Texas Trails | | | | | | | | |
| No | 4500 | | | | | | | 0.00% | |
| | WINDOWS AND DOORS | | | | | | | | |
| No | 4550 | | | | | | | 0.00% | |
| | <i>Interior Close Doors</i> | | | | | | | | |
| Yes | 4550 | Bid | 1.00 | 144.00 | 144.00 | 0.00% | 144.00 | 5.00% | 151.20 |
| | STOCK - Stock Building Supply | | | | | | | | |
| No | 5500 | | | | | | | 0.00% | |
| | APPLIANCES | | | | | | | | |
| No | 5505 | | | | | | | 0.00% | |
| | <i>Total Appliance Package</i> | | | | | | | | |
| No | 5505 | Bid | 1.00 | 8,500.00 | 8,500.00 | 7.25% | 9,116.25 | 5.00% | 9,572.06 |
| | BETTIS - Bettis Service Company, Inc. | | | | | | | | |
| Yes | 5505 | Bid | 1.00 | 8,401.54 | 8,401.54 | 7.25% | 9,010.65 | 0.00% | 9,010.65 |
| | MCNAIRAPPL - MCNAIRS APPLIANCE G2 | | | | | | | | ype note a |

Record: 1 of 17