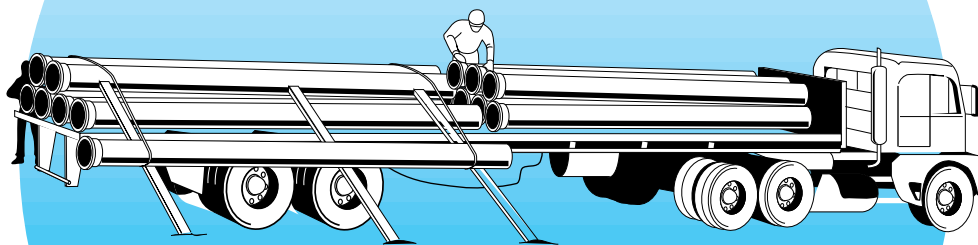


# **Bid Request System**



**Management Planning Systems**

# **MPS**

## **Bid Request System**

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# How to Use the Bid Request System

## Description

### **Stand Alone System**

This Bid Request System is an integrated system containing vendors and list of bid items.

### **FileMaker Solution**

This Bid Request System is a shareware product produced using FileMaker Pro. Products developed with FileMaker Pro are called solutions.

### **Function**

This solution was designed to provide a simple means of producing multiple bid requests for the same material without having to retype the information each time.

### **Copyright**

The Bid Request was developed by Management Planning Systems of Eugene, Oregon, who own the rights to the system. The files may be copied and used for up to 30 days on a trial basis demo to determine if you would like to purchase this system. However, the system may not be routinely used without the written permission of Management Planning Systems. The system is distributed and used in accordance with the standard MPS Software License as shareware for \$29.95.

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# Installing the Bid Request System

## Be Familiar with FileMaker

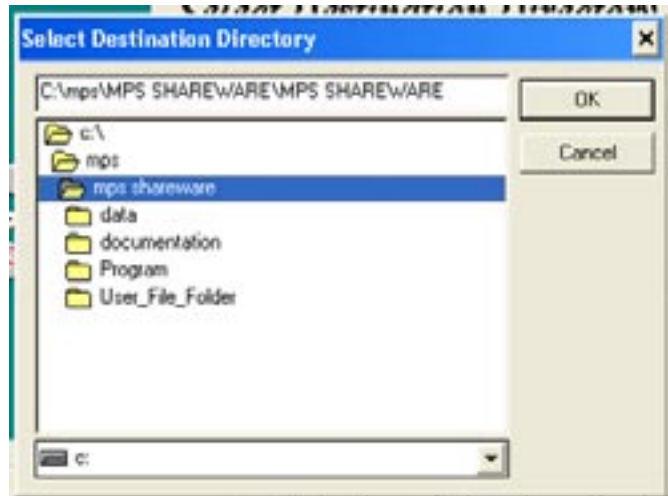
To be effective with the use of this data base the user should be familiar with functions of FileMaker Pro.

## Install

The program is installed following the install procedure found in the How to Install.pdf document on the CD.

## Files and Folders

The install places a folder on the computer titled mps. Inside this folder are four additional folders. The data files are placed inside of the data folder. A copy of this manual is placed in the Documentation folder.



## Start the Program

The Bid Request program may be opened from the Start Menu. Go to MPS Shareware. If Bid Request is the only program installed the screen below will appear. If more than one shareware program has been installed the Launch Utility screen will appear, select Bid Request and the screen below will appear.



# Setup Menu

## Enter Data

Click on the Setup button and the screen below should appear. Fill in the blanks. Everything typed into these windows will appear on the bid request form that is mailed to the vendor.

## Phone and Fax

If you want Tel and Fax to appear before the numbers then it must be typed into the windows. The Organization Name will appear on the opening menu screen. Click on "Return to Menu" when completed.



The screenshot shows a web browser window titled "Bid R". In the top left corner, there is a "Main Menu" button with a circular icon containing four blue dots. The main content area is titled "Setup Screen" and contains several input fields:

- Utility Name:** An empty text input field.
- Organizations Name:** An empty text input field.
- P.O. Box C:** An empty text input field.
- Organizations Address:** An empty text input field.
- City:** A text input field containing "Koror, Pohnpei".
- State:** A text input field containing "PM".
- Zip:** A text input field containing "999999".
- Organizations Phone & Fax:** A text input field containing "(691) 320-2374" and "(691) 320-2422".
- Organizations e-mail:** A text input field containing "puc@mail.fm".

# Initial Data Entry

## Support Table Data

### Support Tables

The support tables are accessed from the main menu and should be populated prior to developing a Bid Request. When support tables are selected from the main menu a screen similar to the one shown below will appear.



### Two Tables

There are two tables that need data; vendors and shipping.

### Vendor Data Input

Select Vendors and a screen similar to the one below will appear.

### View as List

The vendor file appears in the View as List layout. The view as list layout provides a convenient way view the vendor records.

### View as List



### Sorting

In the View as List screen the data can be sorted by vendor or contact name by clicking on the small button located to the left of the field name.



## Print List

### From Menu Bar

When Print List is selected from the menu bar a screen similar to the one below will appear. The data to be displayed and printed in this report can be selected and sorted using the find and sort functions described in the Find and Sort Functions section of this Users Manual.

ASPA Wastewater						
Vendor List						
ID#	Vendor	Phone	Fax	Contact	Discount	e-mail
194	ASD Procurement (aka ASD General Supply)	(504)699-1170				
195	Atlantic Pacific Marine Inc.	(504)699-7722	509-1503	Dean Gregg		
196	Avalon Travel	(504)699-5807	599-5809	Mena or Terry		
197	AvD International					
198	Bay Area Diesel	(504)633-1033	633-1042	James or Lily		
199	Blue Book					
200	BP Petroleum (South West Pacific Limited)	(633)7388	633-7389	Miana Tzaris		
201	Brewer Environmental Industries	(508)532-7401	508-532-7500	Richard McDonald		

### Print the List

The list can be printed by clicking on the Continue button to the left of the screen.

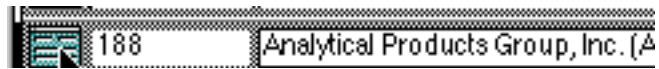


Once selected a new dialog box will appear; select Print or Cancel to return to the view as list.

## View as Form

### Selecting a Record

To view the record in the Form View click on the green button located to the far left of the record.



When the Form View is selected a screen similar to the one shown below will appear.



### New Record

To add a new vendor record, click on the New Record button in the menu bar and a blank record will appear with a vendor number assigned and displayed in the upper right corner. The vendors file is designed to automatically provide a vendor number starting with 101. You can change the default assigned vendor number.

### Enter Data

Once a blank record is obtained the data can be entered. Start by placing the cursor into the Company field.

### Tab to Move

Enter the appropriate data and press Tab to move to the next field. Shift/ Tab will move the cursor back one field at a time. In addition, the mouse can be used to place the cursor into any field.

### Comments and Specialty Fields

The comments and specialty fields are text fields. Any related information can be typed into these fields.

## Edit Vendor Data

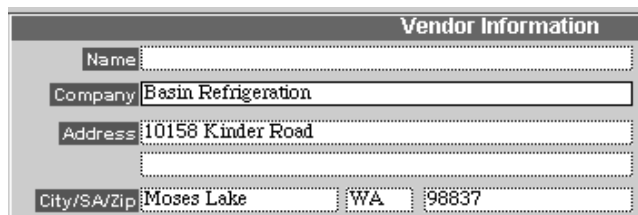
### Change a Record

The vendor data can be changed in either the form or list views. To change the data, place the cursor in the field and delete or type in the required data. For example; to change Basin Ref. to Basin Refrigeration.



The screenshot shows a form titled "Vendor Information" with the following fields: Name (empty), Company (Basin Ref.), Address (10150 Kinder Road), and City/SA/Zip (Moses Lake, WA, 98837).

Place the cursor after the period in Ref., backspace and type the remainder of the word.



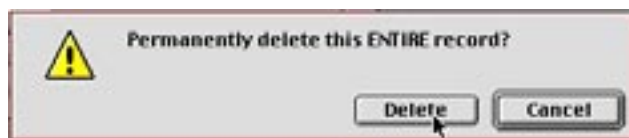
The screenshot shows the same "Vendor Information" form, but the Company field now contains "Basin Refrigeration".

### Delete a Record

Vendor records can be deleted in the form or list views. To delete a vendor record place the cursor into any field in the record and then select Delete Record from the menu bar.



A dialog box will appear asking verification of the delete.



To delete, select the Delete button. **Caution:** Undo does not work with Delete.

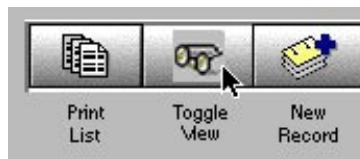
## Shipping Table

The shipping table is a simple list of various shipping methods. These methods are selected from a popup list when the bid request is developed. The existing data in this table can be printed, edited, new records created, or records deleted using the functions described above for the vendor table.



### Toggle View

Each of the support tables contains a Toggle View button located in the menu bar.



Clicking on this button will provide an additional view of the data. In this view, the title bar above each data field becomes a sort button. In addition, the actual name of the field is displayed in the title bar. This can be very helpful when attempting to import data as the name of the import field must be identified.



# Materials

## From Menu

To populate the materials file start by clicking on "Materials" button on the main menu. A screen as shown below should appear.

## Data Entry


Fill in the remaining blanks and then click on "New Record" to get a new blank line. **You must give each item an "Item Number."** If you do not the item will not appear in this window when you return.

## Rate and Amount Fields

It is not necessary to fill in the Rate field. However, if this field is filled in the template will automatically calculate the Amount. *You cannot enter data into the Amount field.* When finished click on "Return to Main Menu."

M. No.	Description	Quantity	Unit	Rate	Amount
AV11	1" dia. Air Release Valve	17	Nz.		\$0
AV12	1" dia. Combination Air Valve	18	Nz.		\$0
AV13	6" x 1" Service Saddle	35	Nz.		\$0
AV14	1" dia. Corporation Stop	35	Nz.		\$0
AV15	1" dia. Gate Valve	35	Nz.		\$0

## Sort

Clicking on the sort icon  directly above a column will sort the data by the information in the selected column.

## Select Reports or Price Quote

Access to the report menu or the Price Quote screen can be obtained from the main menu or directly from this screen by clicking on the appropriate button in the button menu at the top of the screen.

# Producing a Bid Request Data Entry

## From Menu

To produce a request for price, start by clicking on the Price Quote button on the main menu or selecting Price Quote from the materials screen. The screen below should appear.

Item #	Description	Quantity	Unit
1	5" x 1" Service Saddle	12	Rt.
2	1" dia. Combination Air Valve		Rt.
3	1" Brass Union, PPT x PPT		Rt.

## Request No. and Date

The request number and the date issued will automatically be inserted.

## Vendor

The vendor is selected by clicking in the vendor files and a pop-up list of all of the vendors will appear. Select the vendor you want and click the mouse. The vendor name will appear in the vendor field and the cursor will advance to the From field.

## From

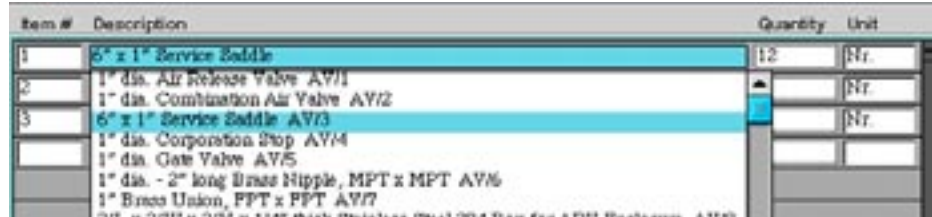
Type the information you want to appear in the From box of the bid request then press tab. The cursor will advance to the "Shipping" field.

## Shipping

Select the desired shipping method from the pop-up list and press tab. The cursor will move the "Description" field.

**Select Materials**

When the cursor is in the materials “Description” field a pop-up list of all of the materials, sorted by the description name will appear. Select the materials you want and click the mouse. As a material description is added the line item will be numbered automatically. Once the description has been selected the “Unit” field will be filled in and the cursor will jump to the “Quantity” field.



Item #	Description	Quantity	Unit
1	6" x 1" Service Saddle	12	Nr.
2	1" dia. Air Release Valve AV/1		Nr.
3	1" dia. Combination Air Valve AV/2		Nr.
	6" x 1" Service Saddle AV/3		Nr.
	1" dia. Corporation Stop AV/4		
	1" dia. Gate Valve AV/5		
	1" dia. - 2" long Brass Nipple, MPT x MPT AV/6		
	1" Brass Union, FPT x FPT AV/7		

**Quantity**

Fill in the quantity and press Tab and the cursor will go to the next materials “Description.” Continue until all materials have been added.

**Item # Field**

The Item # field will be automatically filled in by the program. This is **not** the same number as the item number given to the materials list.

# Print Request

## Print Button

When the request is completed, click on the "Print Request" button.



## Print Screen

This will take you to the print screen. Only the selected request will be printed. To print a specific request, find the request in the "Request for Price Quotation" screen and click on the "Print Request" button and a screen similar to the one below will appear. Press "Continue" to print or cancel the printing.

Print Request

Request for Price Quotation

**Pohnpei Utilities Corporation**  
P.O. Box C  
Kolonia, Pohnpei PM 96941  
Tel: (691) 320-2374 Fax: (691) 320-2422  
puc@mail.fm

Request No. PO2000-004 Issue Date 3/11/2000

To: Arasmith Consultant Resources, Inc. From:

CIF Pohnpei - Ocean Freight

Item #	Description	QTY	Unit	Unit Price	Total
1	Helo	12			

# Reports

## Select Data Materials

Before printing a report it is wise to select the data. Material data can be selected using the find function in when viewing the "Materials List. "

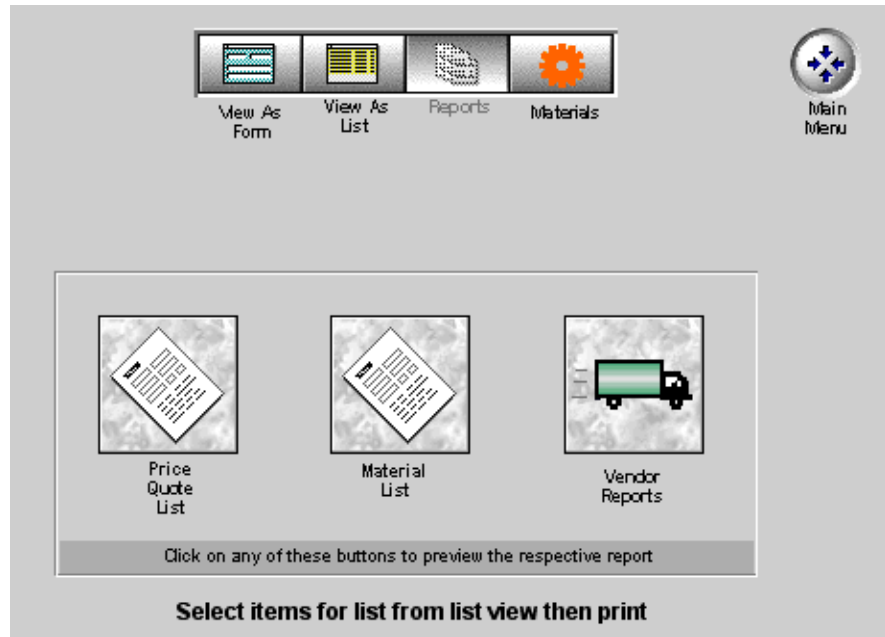
## Select Data - Quotes

To select price quotes first go to the data input screen, then select "List View." From this view, use the find function to select the desired records. Then click the "Reports" button and you will go to the reports menu.



## Select Report

There are two reports built into this template. The Price Quote List and the Material List. They are accessed by clicking on the "Reports" button on any screen or from the main menu. When this button is pressed the following screen will appear.



**Sample Reports**

Here are examples of the Price Quote List report and the Materials List report

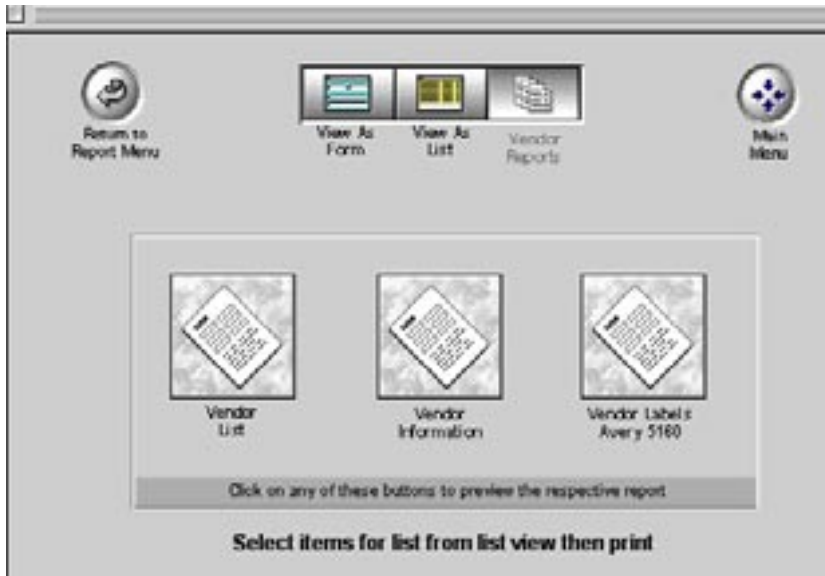
<b>Pohnpei Utilities Corporation</b>		
<b>Request for Price Quotation List</b>		
Bid Req. No.	Vendor Name	Date Issued
PQ2000-004	Arasmith Consultant Resources, Inc.	Mar 11, 2000
PQ2000-005	Arasmith Consultant Resources, Inc.	Mar 27, 2000
PQ2000-006	Arasmith Consultant Resources, Inc.	Apr 30, 2000

<b>Pohnpei Utilities Corporation</b>					
<b>Materials for Price Quotation</b>					
Item No.	Description	Quantity	Unit	Rate	Amount
AV/1	1" dia. Air Release Valve	17	Nr.		\$0
AV/2	1" dia. Combination Air Valve	18	Nr.		\$0
AV/3	6" x 1" Service Saddle	35	Nr.		\$0
AV/4	1" dia. Corporation Stop	35	Nr.		\$0
AV/5	1" dia. Gate Valve	35	Nr.		\$0
AV/6	1" dia. - 2" long Brass Nipple, MPT x MPT	70	Nr.		\$0
AV/7	1" Brass Union, FPT x FPT	35	Nr.		\$0
AV/8	2'L x 2'W x 2'H x 1/4" thick Stainless Steel 304 Box for ARV	8	Nr.		\$0
AV/9	24" dia. C.I. Manhole cover with Frame	32	Nr.		\$0
BO/1	6" PE x 6" PE x 4" FE HDPE Invert Tee, with Metal backup ring at	20	Nr.		\$0
BO/2	4" dia. Gate Valve, FE x FE with bolts set kit and red rubber	20	Nr.		\$0
BO/3	Valve Box, Cover and Frame - 7 3/8" dia.	20	Nr.		\$0
BO/4	Valve Box Cover and Frame - 7 3/8" dia.	20	Nr.		\$0
BO/5	2" dia. PVC Male Adapter (MIPT x Soc.)	20	Nr.		\$0
BO/6	4" dia. Elbow 90, PVC Sch 80, Soc x Soc.	20	Nr.		\$0
BO/7	4" x 2" Reducer Bushing, PVC Sch 80, Flush Style (Spigot x Soc.)	20	Nr.		\$0
BO/8	4" FCA for 4" PVC Sch. 80 Spool	20	Nr.		\$0

# Vendor Reports

## Select Vendor Reports

Selecting vendor reports from the report menu will bring you to a second menu shown below.



## Example Reports

Below are examples of the Vendor List and Vendor Information Reports.

Vendor	Address	Phone	Fax	Contact
Arasmith Consultant Resources, Inc.	1298 Elm St. SW Albany, Oregon 97321	503-928-5211	541-926-3478	Skeet Arasmith

Vendor	Phone	Fax
Arasmith Consultant Resources, Inc.	503-928-5211	541-926-3478
Address	Contact	e-mail
1298 Elm St. SW Albany, Oregon 97321	Skeet Arasmith	
	Discount	Notes
	0	Certification Program Consultant/Instructor

## Avery Labels

Selecting the Vendor Labels Avery 5160 provides the opportunity to print vendor address information directly onto Avery 5160 labels.

# Find Function

## From the Button Bar

### Select Find

A find button is included in the button bar of most screens. To perform a find click on this button and all of the data fields will go blank allowing you to enter the find criteria.



### Perform a Find

To perform a find, type the information you want to find into the field that contains the information and then press Continue, Return, or Enter. Notice all of the pop-up lists are available to assist in the find.

### Words or Letters

It is not necessary to type in all of the information. For example, if you wanted to find a name starting with a "C" you would only need to type the letter "C" and the program will find all of the records with a word in the field that starts with a "C."

### Multiple Fields

To clarify a find, you can type information into as many of the fields as is necessary to clarify the find. For example you can select the vendor and shipping method in one find.

### Multiple Finds

There are times when you may want to find more than one item in the same field. For example it may be necessary to select two or more pieces of data from the same field. Type in the first piece of data, then either type Control-N or select New Request from the Mode menu and type in the next request. (The number of requests that can be made at one time is limited only to a particle limit.) If the status bar is turned on (see below for how to turn on the status bar) you can look through each request to make sure they are as desired.



When all of the request are completed, press Return or Find in the Status bar.

## Omit Data

To omit bid request with specific information from a find, click in the Omit box after setting up the find. The result will be all of the bid request not omitted. To view those omitted use select the Find Omitted from the Select menu.

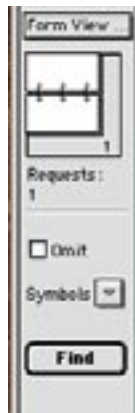


## Turn On Status Bar

The status bar allows access to a variety of find and other functions. To turn on the status bar, click on the status bar icon located near the bottom left of the screen.



What will appear will look similar to the image below.

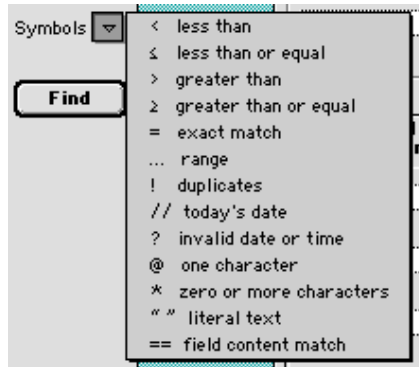


## Omit

The selected data can be omitted from the find by clicking on the Omit box located in the status bar or from the menu as described above.

## Find Symbols

Once the find function has been selected the status bar will open. Clicking on the small arrow next to the word Symbol will bring up an additional dialog box providing a number of symbols used to clarify finds.



## Two Most Common Symbols

Two of the most commonly used are the Range (...) and Exact Match (=).

### Range

The range symbol can be used to select a set of bid request issued between any two dates. Type in the first date followed by three periods (...) or select the symbol and then the second date, then press the Continue button, return or enter keys.

### Exact Match

The exact match symbol is useful for finding work orders where a specific field is blank. To find work orders with no information in a specific field, type a = into a field or select = from the symbol menu. Then press the Continue button, return or enter keys.

## Find From the Menus

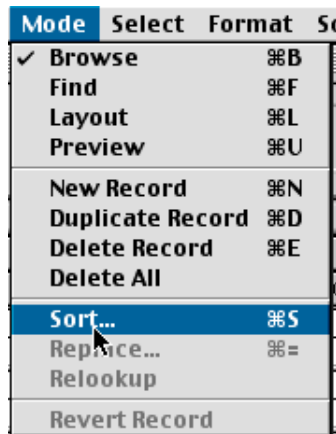
The find function can be invoked from the Mode menu, from the keyboard by typing Control F, or from the Mode Pop-up list located at the bottom left of the screen.



# Sort Function

## Keyboard or Menu

The sort function can be obtained from the keyboard by typing Control S or selecting sort from the Mode menu. This procedure should only be used by those who have knowledge of FileMaker Pro.



## Dialog Box

When the sort command is invoked a dialog box will appear allowing you to select which selection of fields and the arrangement of fields for a sort.



## Select Fields

Select the field from the list on the left and then either double click or click Move to move the field to the right.



### Rearrange Fields

Once the fields have been moved to the right they can be rearranged. Place the cursor on the double arrow to the left of the field and the cursor changes to two lines with arrows. When this occurs click, hold, and move the field to the new position. When completed press Sort.

