Bids

By now, you've learned how to create an estimate for your customers, outlining the materials needed and the pricing you're offering for their project.

If all goes well, your customers accept the estimate and are anxious to start their project. That means that you're ready to convert the estimate into a Bid.

Before we begin, let's define some terms. Specifically, what is the difference between an Estimate and a Bid as defined by the Eagle?

Simply stated, an Estimate is a saved document that gives the customer a list of material prices for a project.

A Bid is an accepted Estimate. In other words, the customer has agreed to the quantities and pricing outlined in the estimate and wants to begin scheduling delivery.

The salesperson can now tell Eagle to convert the accepted estimate into a dynamic document known as a Bid, which then can be used to create the Orders to be shipped.

The salesperson can choose all of the items on the Bid to create the Order or, in the case of larger projects, select specific lines to ship, leaving other lines on the Bid to be converted to Orders and shipped later.

For this session, let's assume that you've talked to a customer about an estimate you prepared. The customer has reviewed the prices and quantities and accepted it.

Now, the customer has asked that some of the items on that estimate be delivered.

As we walk through this example, you'll learn how to recall an estimate, create a Bid from an Estimate, and create an Order from a Bid.

Let's get started, by opening Point of Sale and navigating to the Header screen.

Topics

- Recall Estimate
- Create Bid
- Create Order

Recall Estimate

If you have a printout of the Estimate, use the document number to recall the Estimate using the dot lookup method.

Remember, this simply means that you type a period followed by the document number into the customer field and press Enter.

The Estimate is retrieved and displayed in Point of Sale.

Once you've recalled the Estimate, review the customer information in the Ship To fields.

Typically, the customer's phone number and name were saved with the Estimate, but if the customer needs the material to be delivered, make sure the Ship To fields have the correct project address.

Otherwise, you'll be dispatching the delivery to the wrong location.

Create Bid

Now you can convert the Estimate into a Bid. Find the field labeled Bid, between the Estimate / Bid # field and the Phone number field.

Type a Y into the field and click the Change Icon. The document indicator in the upper left-hand side of the Header screen changes from Maintain Quote to Maintain Bid.

Create Order

After changing the estimate to a bid, you're ready to return to the posting screen to choose the lines you want to ship or invoice on the first order.

When you press Post, you're asked whether you want to Create an Order From This Bid or Change this bid back to an Estimate. Before we continue, can anyone think why we would want to change the Bid back to an Estimate?

If you said that you might need to edit the bid by changing prices or adding items, you're right. Those changes would need to be made in the estimate format before changing the bid into an order.

Since our estimate was in good shape when we changed it to a bid, we can continue with creating an order.

Notice that when the order opens on the posting screen, a message appears at the bottom of the screen telling you to check the boxes next to the items that you want to include on your order.

Alternately, you can press the Miscellaneous Menu for selection options.

As you can see, there are several choices.

Let's select a range of lines. Type the lines you want, in this case, line 1 thru 4, and press Enter.

Say you also want to choose line number 6. Since it's not in the range, you can just click the check box.

Finally, you need to ship only half of the items on line 7. In order to do that, press Change and enter the number of the line to change. The item appears in the work area below, where you can type the quantity needed for this order.

Press Enter to add the changes to the order.

Next, let's take a look at the different quantity columns. You'll find the Original Quantity, Net Quantity, and Order Quantity for each item.

Original Quantity is just what you think it is: the quantity that was posted when the Estimate was created.

Net quantity is the quantity that still needs to be shipped after this order is created. Note line 7's Net quantity is half the original quantity, which points out that you still have a quantity to ship.

Finally, the Order Quantity is the quantity that is being added to the order you are creating from this Bid.

Once you have all the items chosen for the delivery, total the order, Save and Print, and forward the new order to dispatch.

Items that were not picked for delivery will stay on the Bid until the next time the customer wants items shipped or comes to pick them up.

As you've seen, changing an Estimate to a Bid is as easy as changing the Bid flag to Y.

Bids can then be changed to Orders that can be used to pick and ship selected items.

Bids provide a good way to lock in customer prices and keep sales staff informed on what has and hasn't been shipped. This provides a higher level of customer service to your customers and gives the sales staff confidence they are shipping the correct products and quantities.

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