



# **Eclipse Master Job Bid Management**

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Release 8.6.2 (Eterm)

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## Table Of Contents

Master Job Bids Overview .....	1
Setup Requirements for Master Job Bids.....	2
Master Job Bid Entry Overview .....	3
Master Job Bid Entry Workflow.....	5
Creating Master Job Bids.....	6
Cost Code Concepts.....	9
Adding Cost Codes to Products .....	10
Type/Tag and SubType Concepts.....	11
Adding Tag Types and SubTypes to Stock Items.....	13
Adding Type/Tags and SubTypes to Lot Item Materials.....	14
Junior Orders Overview .....	15
Creating Junior Orders for Stock Items .....	17
Creating Junior Orders for Lot Items.....	19
Master Job Bid Maintenance Overview.....	21
Reviewing Master Job Bid Totals.....	23
Reviewing Master Job Bid Record Changes .....	25
Reviewing Master Job Bid Lot Item Status Updates .....	27
Reviewing Master Job Bids .....	29
Viewing or Editing Master Job Bids.....	31
Reviewing Master Job Bid Price and Cost Totals .....	32
Reviewing Junior Orders for Master Job Bids.....	33
Updating Project Statuses .....	35
Canceling Master Job Bids .....	37
Converting Master Job Bids to Sales Orders .....	39
Tracking Project Progress.....	40
Selecting Job Bid Tracking Screen Views.....	42
Filtering the List of Master Job Bid Products.....	44
Exporting Master Job Bid Information.....	46
Reviewing Junior Order Products.....	48
Reviewing Lot Item Materials on Master Job Bids .....	50
Filtering the List of Master Job Bid Lot Item Materials.....	52

# Eclipse Master Job Bid Management

Index .....	55
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# Master Job Bids Overview

The master job bids functionality tracks all sales orders associated with a large project, for example, construction of a football stadium or commercial high-rise building. You begin by creating a bid that contains all products the customer will need to complete the project. Once you have identified all products, you quote the customer the price they can expect to pay over the life of the job.

**Note:** Even if they expire, master job bids and junior orders are not purged when the Bid Purge program is run.

## Why use a Master Job Bid?

If you add lot items to a sales bid, the system creates a separate generation for each lot billing item you enter. If all items need to be on one generation in order to provide a single document as a quote to the customer, then you need to create a master job bid.

## Junior Orders

As the customer progresses through the various phases of the project, they will need specific materials. Instead of entering sales orders, you launch them from the master job bid. These kinds of sales orders are referred to as *junior orders*. The advantage of launching junior orders is that the system subtracts the ordered quantities from the master job bid so that you can keep a running tally of what products were used, and when.

## The Lot Billing / Master Job Bids Connection

In addition to stock and nonstock products, you can add lot item products to your master job bids. A lot item is a group of products that are sold as if they were one item. The price can be either calculated from the individual materials or estimated. You can add multiple lot items to your master job bids, if needed. For more detailed information about this subject, see the Master Job Bids Entry Overview.

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### See Also:

[Junior Orders Overview](#)

[Master Job Bid Maintenance Overview](#)

[Setup Requirements for Master Job Bids](#)

## Setup Requirements for Master Job Bids

Following are the control maintenance records and authorization keys used for master job bids, along with additional setup requirements.

### Control Maintenance Records

Set the following control maintenance records:

- Allow Material Detail Type/Tag SubType Duplicates
- Default New Lot Item Generations To Hold For Vendor Release
- Display Warning When A Master Job Bid Exceeds The Estimated Totals
- Valid Master Job Bid Statuses

### Authorization Keys

Assign the following authorization keys:

- OE.JOB.MAINT
- OE.LOT.OVRD.TYPE.DUPS
- SOE.MASTER.BID.EDIT

### User Maintenance

Add the following order entry views to each Master Job Bid user's maintenance record, if you plan to use the related functionality:

View	Displays the following columns in Sales Order Entry...
COST.CODE	Cost Code
TYPE.SUBTYPE	B/O, Tag Type, and SubType

### Customer Maintenance

Do the following, as needed:

- Assign master job bid numbers to customers.  
**Note:** You can break the association with a master job bid number on the order's Job Maintenance screen.
- Assign cost codes to the products the customer often uses in projects.

## Master Job Bid Entry Overview

A master job bid is a bid that encompasses all of the products needed to complete a project or job. Master job bids work like lot billing bids, only on a much larger scale. In fact, master job bids can contain multiple lot items, along with both stock and nonstock items. For a high-level explanation of master job bids, see the Master Job Bids Overview.

### Creating Master Job Bids

Creating a master job bid is similar to creating a regular sales bid, with the exception that once you designate the order as a master job bid, it can never have any other status, other than **Canceled**.

The master job bid serves as a mini-inventory of all of the products needed to complete a project. The system will never commit any products on the master job bid. To order products, you launch a junior order. Authorized users can edit the master job bid, but be aware that the system does not track those changes. In a future release, you will be able to enter a change order to track all changes to master job bid products or quantities.

### Using Lot Billing with Master Job Bids

Master job bids can include lot items. Lot billing orders are similar to master job bids in that you can use either to manage ongoing multiple shipment projects.

#### Why Use Lot Items?

Lot Billing orders have some unique advantages. You can assign each individual material its own price, or you can price all of the materials as part of a lump sum at the lot item level. You can choose any one of three invoicing methods, which can help you to remain profitable throughout the project. The Lot Billing application also provides several logs, ledgers, and reports to help you monitor project progress.

#### Differences When Using Lot Items

If you decide to include lot items in your master job bids, be aware of these conceptual differences from normal Lot Billing and Master Job Bid behavior:

- A master job bid can include numerous lot items, each on the same generation as the stock products on the master job bid. Under normal circumstances, lot items must be on separate generations.
- When you create a junior order for a lot item, you cannot include stock items from the master job bid on that order. Under normal circumstances, you can add stock generations to lot items.
- You cannot separate quantities of lot item materials onto separate orders, unlike other master job bid products, which can have quantities of the same product on multiple orders. Each lot item can exist only on a single order, however, that order can have multiple shipment generations.

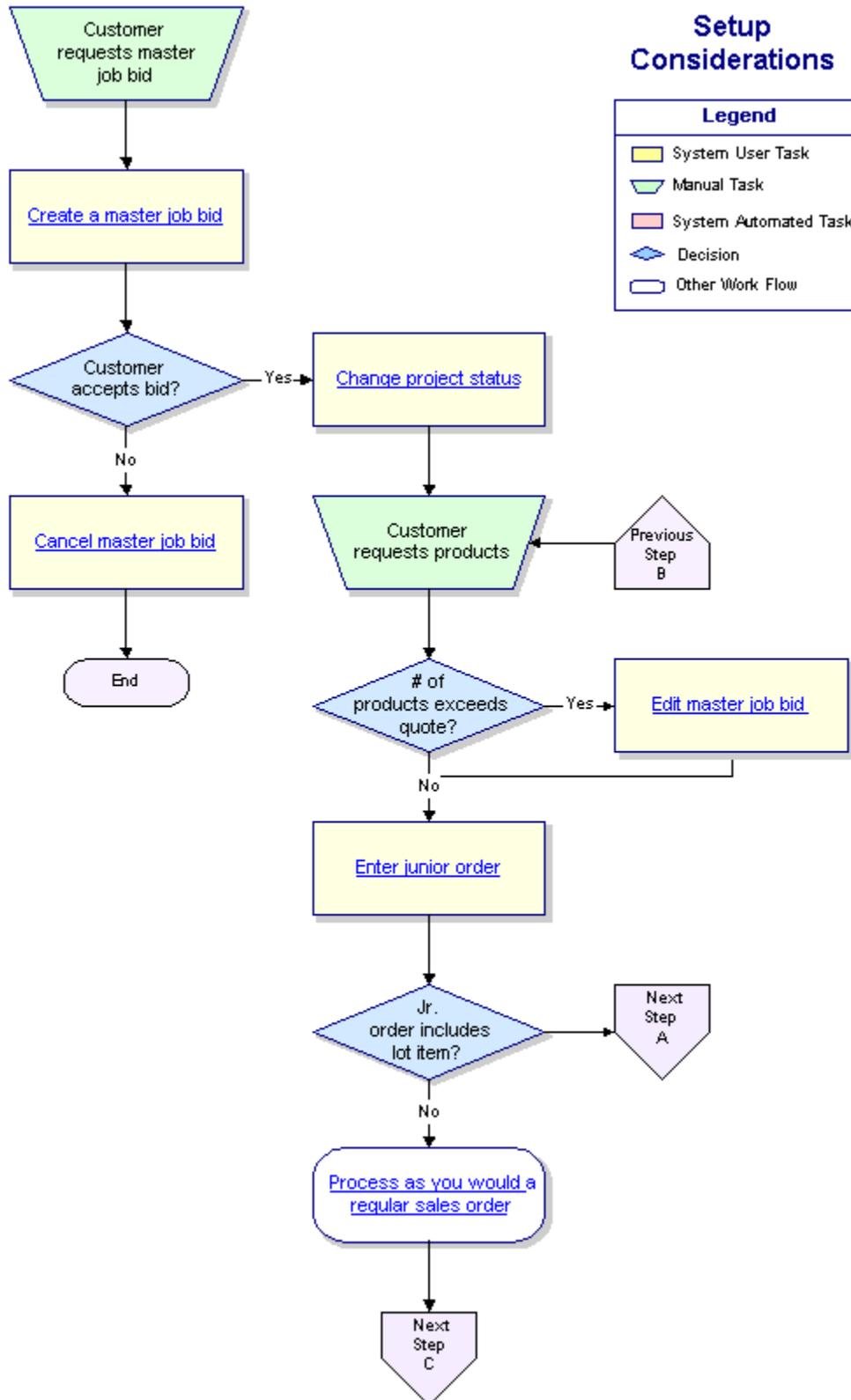
- When launching junior orders from Job Bid Tracking, you work only with the products on a single lot item.
- Alternate column views in Job Bid Tracking are limited to the Prices and Costs views.
- Cost codes do not apply to lot items, however, you can enter Type/Tags and SubTypes for them.

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**See Also:**

Master Job Bid Maintenance Overview

# Master Job Bid Entry Workflow



## Creating Master Job Bids

Master job bids are sales bids that are used to track all of the products used during the life of a project. The main difference between a master job bid and a regular sales bid is that the master job bid will never become an order. Instead, you will spawn junior orders from it. The system tracks the quantities so that you can easily determine how much remains to be done on the project.

You create a master job bid from a sales bid on the Job Maintenance screen. This screen contains all of the information you need to monitor the master job bid over the life of the project, as well as information about how to process invoices.

**Note:** Once you create the master job bid, you cannot change it, unless you have authorization.

This instruction includes the following topics:

- Creating a bid
- Changing the bid to a master job bid

### ► To create a bid:

1. From the **Orders** menu, select **Sales Order Entry** to display the Sales Order Entry Body screen.
2. If accessible, in the **PrcBr** field, enter the code that identifies the branch whose pricing matrix will be used to price the items on the order.
3. In the **Ship To** field, enter the customer.
4. If accessible, in the **ReqrDate** field, enter the date the customer anticipates completing the project.
5. Use the **Mode** hot key and select **Bid** from the selection list.
6. Enter all of the products needed to complete the project.

To enter lot items, see Entering Lot Items on Bids.

### ► To change the bid to a master job bid:

1. From the displayed bid on the Sales Order Entry Body screen, use the **Header** hot key to display the Sales Order Entry Header screen.
2. Change information, as needed.
3. Use the **Add'l** hot key and then the **Job Maintenance** hot key to display the Job Maintenance screen.
5. In the **Master Order** field, enter **Y**.

**Note:** Leave the **Junior for Master Order #** field blank.

6. Complete the following fields, as needed:

Field	Description
<b>Project Manager</b>	The user ID of the person responsible for maintaining this master job bid project.
<b>Project Status</b>	The status of this master job bid project. These values are user-defined and are maintained in the Valid Master Job Bid Statuses control maintenance record.  <b>Note:</b> This status displays along with the shipment status on the Sales Order Entry Status screen.
<b>Follow-Up Date</b>	The next date to review the master job bid. You can review master job bids by follow-up date on the Master Job Bid Review Queue screen.
<b>Expected Date</b>	The date by which the customer expects to finish the project.
<b>Estimated Total Price</b>	An estimate of the total amount the customer will pay if they order all of the products on the master job bid.
<b>Estimated Total Cost</b>	An estimate of the total amount you will pay the vendor if the customer orders all of the products on the master job bid.
<b>Consolidated Invoicing</b>	A method of printing invoices that combines the billings for several orders. To use this feature, enter <b>Y</b> ; otherwise, enter <b>N</b> . For more information, see Printing Consolidated Invoices.
<b>Allow Dup Type-SubType</b>	Identifies whether to allow duplicate Type/Tags and SubTypes when adding lot item materials to the master job bid. Enter <b>Yes</b> to allow duplicates; otherwise, enter <b>No</b> . For more information, see Type/Tag and SubType Concepts.

7. To add additional information to your products, use the **View** hot key, and do any of the following:

To identify...	From the list, select...
cost codes	<b>Cost Code</b> to display the <b>Cost Code</b> column. See Adding Cost Codes to Products for more information.
Tag Types and SubTypes	<b>Tag Type &amp; SubType</b> to display the <b>B/O</b> , <b>Tag Type</b> , and <b>SubTyp</b> columns. See Adding Tag Types and SubTypes to Stock Items for more information.

8. When you are finished working with the order, press **Esc** to re-display the Sales Order Entry Header screen.

Verify that the shipping address is correct. If it is not, press the up arrow key and, in the **Ship To** field, enter the new address information.

9. Press **Esc** to save the information and display the Sales Order Entry Status screen.

Verify that the status is **Bid** – <your user-defined status>.

10. Press **Esc** to save the bid and exit the screen.

**See Also:**

Master Job Bid Entry Overview

Updating Project Statuses

## Cost Code Concepts

You can assign user-defined numbers called cost codes to the products on your master job bids as a means of categorizing similar products for pricing and subtotaling purposes. Assign cost codes on the Customer Vendor Specific Part Numbers screen.

Typically, the first part of the number identifies the project phase, for example, rough in, build-out, or finish work. The second part of the number indicates the type of product, such as plumbing or electrical.

For example, if the rough in phase is assigned an ID of **1425** and electrical products are assigned an ID of **5**, the cost code for an electrical product used during the rough in phase would be **1425.5**.

After you assign cost codes to individual products, you can use them to organize orders or manipulate group prices. For example, you can limit the number of products that display on the Job Bid Tracking screen by cost code, and then order each product within that stage or product group on the same junior order.

To view totals for open sales and invoice sales, grouped by cost code, run the Sales by Cost Code Report. When run in detail mode, the report lists the transactions that comprise each subtotal. You can include or exclude bids and direct shipments. You can also run the report for a single customer, purchase order, or release number.

**Note:** To connect your stock products and lot item products, use Type/Tags and SubTypes.

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**See Also:**

Creating Master Job Bids

Adding Cost Codes to Products

Tracking Project Progress

Reviewing Junior Order Products

## Adding Cost Codes to Products

Use cost codes to organize the products within your project by phase for pricing or subtotaling purposes. Cost codes are usually set up in Customer Maintenance on the Customer / Vendor Specific Part Numbers screen. This instruction shows how to access this screen from Sales Order Entry.

### ► To add a cost code to a product:

1. Create or open a master job bid.
2. From the Sales Order Entry Body screen, use the **Inq** hot key and then the **Customer Part#** hot key to display the Customer / Vendor Specific Part Numbers screen.
3. In the **Product Description** column, enter the product for which to assign a cost code. If a selection list displays, select the correct product from the list and press **Enter**.
4. In the **Customer/Vendor Part #** column, enter either the part number your customer uses to identify the product or **@** to use the system assigned part number.
5. Use the **View** hot key, select **Cost Code** from the list, and press **Enter**.
6. For each product, in the **Cost Code** column, enter the user-defined code that identifies the phase of the project, followed by a decimal point (**.**), followed by the user-defined code that identifies the type of product, such as electrical or plumbing.
7. When you have finished adding products and cost codes, press **Esc** to return to the Sales Order Entry screen.
8. Use the **View** hot key, select **Cost Codes** from the list, and press **Enter** to display the Cost Codes column.

The system populates the column with the cost codes you added.

**Note:** You must have the COST.CODE order entry view assigned to view this column.

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### See Also:

Type/Tag and SubType Concepts

Adding Type/Tags and SubTypes to Lot Item Materials

Adding Tag Types and SubTypes to Stock Items

## Type/Tag and SubType Concepts

Use a user-defined Type/Tag to categorize a product, and a SubType to categorize the components of that product. Type/Tags and SubTypes are similar to kits in that you use them to connect the components of a finished product. However, the advantage to using Type/Tags and SubTypes is that you can mix and match the components. For example, a kit would specify a particular light bulb, such as a 60 watt fluorescent Sylvania light bulb, whereas with Type/Tags and SubTypes, you can use any light bulb that fits the socket.

Type/Tags and SubTypes are particularly useful, for example, if you include several lighting packages within a single lot item. You assign the same Type/Tag to all of the parts that comprise a lighting device, and the same SubType to the same pieces used to build the different lighting devices.

Let's say you sell all of the components for a desk lamp and an overhead light, for example. You assign the components for the desk lamp a Type/Tag of **1118**, and the components for the overhead light a Type/Tag of **1119**. Each lighting fixture uses the same basic components, so you assign the shade/cover a SubType of **SHD**, the wiring package a SubType of **WIR**, the light bulb a SubType of **BLB**, and so on. When you enter the codes on the order, the products should have the following codes attached:

Product	Type/Tag	SubType
GL-36 36" LIGHT W/TULIP SHADE -OAK	<b>1118</b>	
OMEGA TULIP LIGHT SHADE	<b>1118</b>	<b>SHD</b>
GE 60WATT LIGHT BULBS	<b>1118</b>	<b>BLB</b>
GL-36 WIRING KIT	<b>1118</b>	<b>WIR</b>
AQUA GLASS DOME LIGHT - CHROME	<b>1119</b>	
AQUA GLASS DOME LIGHT COVER	<b>1119</b>	<b>SHD</b>
SYLVANIA FLUORESCENT CIRCULAR LIGHT BULBS	<b>1119</b>	<b>BLB</b>
AQUA GLASS WIRING KIT	<b>1119</b>	<b>WIR</b>

When you organize your materials this way, you can limit the products that display on the Lot Job Bid Tracking screen by either assembly or by part. You can then order materials based on your criteria instead of scrolling through the list looking for the individual pieces you need. You can also add Type/Tags and SubTypes to stock items to connect them to the lot item materials; however, you can view the combination of stock and lot items only by creating a Report Writer report.

During system setup, you can specify whether to allow duplicate Type/Tags and SubTypes on the same order. Users with the OE.LOT.OVRD.TYPE.DUPS authorization key can change this value in the **Allow Dups Type-SubType** field on the Job Maintenance screen.

**See Also:**

Adding Type/Tags and SubTypes to Lot Item Materials

Adding Tag Types and SubTypes to Stock Items

Reviewing Lot Item Materials on Master Job Bids

Updating Project Statuses

Cost Code Concepts

## Adding Tag Types and SubTypes to Stock Items

You can link the Type/Tags and SubTypes you enter for lot item materials to stock items on your master job bid, if needed. For example, if you plan to direct ship lamp components to the customer, but you have light bulbs stocked in your inventory, you can assign the Type/Tag used for the lamp to the light bulb, and then use the bulb SubType. This will remind you that those light bulbs are specifically for that lamp.

### ► To add a Tag Type and SubType to a stock item:

1. Create or open a master job bid.
2. On the Sales Order Entry Body screen, use the **View** hot key to display a selection list.
3. Select **Tag Type & SubType** from the list and press **Enter** to display that column view.  
You must have the TYPE.SUBTYPE order entry view assigned to view these columns.
4. For each product, enter values in the following columns, as needed:

Column	Description
<b>Tag Type</b>	A user-defined code that identifies the group to which the product belongs.
<b>SubType</b>	A user-defined code that identifies the type of item within the Tag Type.

The system populates the **B/O** column with **Y** if the selected product is on backorder; otherwise, this column is blank.

5. Continue entering or editing the order.

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### See Also:

Adding Tag Types and SubTypes to Lot Item Materials

Cost Code Concepts

Adding Cost Codes to Products

## Adding Type/Tags and SubTypes to Lot Item Materials

You can add codes to your lot item materials to help you organize them. The Type/Tag indicates a product, and the SubType indicates that the material is a component of that product.

### ► To add a Type/Tag and SubType to a lot item material:

1. Create or open a master job bid that includes a lot item.
2. Position the cursor on a lot item and use the **NonStk/Lot** hot key to display the Lot Item Status screen.
3. Use the **Material Detail** hot key to display the Lot Item Material Detail screen.
4. Enter lot item materials.
5. Use the **View** hot key and select **TypeTag / SubType** from the list to display the **Type/Tag** and **SubType** columns.
6. For each product, enter values in the following columns, as needed:

Column	Description
<b>Type/Tag</b>	A user-defined code that identifies the group to which the product belongs.
<b>SubType</b>	A user-defined code that identifies the type of item within the Type/Tag.

For more information, see Type/Tag and SubType Concepts.

7. Continue entering or editing the order.

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### See Also:

Adding Tag Types and SubTypes to Stock Items

Cost Code Concepts

Adding Cost Codes to Products

Creating Junior Orders for Lot Items

## Junior Orders Overview

You can create junior orders in a number of different ways, including:

- Launching from:
  - The Job Bid Tracking screen
  - The Job Maintenance screen
- By default
- With a lot item

A junior order is identical to a regular sales order, and can have a myriad of order statuses. Lot items can be only direct shipments or bids. You can change the order status, as needed. The heading of a junior order always indicates the master job bid to which it is attached.

### Launching a Junior Order from Job Bid Tracking

The Job Bid Tracking screen gives you a complete view of the status of the master job bid. From here, it is easy to tell how much product has been ordered and how much has shipped, so you can use it to create a junior order. You just enter the quantities of the products to order and press the hot key to launch it.

### Launching a Junior Order from Job Maintenance

When you create a master job bid, you can launch junior orders from it. You can add selected products to the junior order, or all of them. The system creates a separate junior order for each lot item, and one junior order for all selected stock products. Order level comments are included on all junior orders, in case they apply to all of them. You can delete the comment when it does not apply.

### Creating a Junior Order by Default

If all of a customer's orders are part of a master job bid project, you can set up the master job bid number in the customer's maintenance record. If you do this, each time you enter a sales order for that customer, the system attaches it to the master job bid.

### Creating a Lot Item Junior Order

Creating a junior order that includes a lot item is similar to launching a junior order from the Job Bid Tracking screen, but with these differences:

- When prompted to select a product type, you specify **Lot Products**. This shows all of the lot items on the master job bid.
- You use a quantity of **1** (one) for lot items, because the system considers the lot item a single product. It is only a placeholder and does not reflect the true quantities of its materials.

- You change lot item material quantities from the Lot Job Bid Tracking screen instead of the Job Bid Tracking screen.
- You can create only one junior order for a lot item. However, that order can contain multiple shipment generations.
- Only the **Costs** and **Prices** views are available on the Job Bid Tracking screen, because the other views are not applicable.

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**See Also:**

Updating Project Statuses

## Creating Junior Orders for Stock Items

After you create your master job bid for the project and the customer approves the quote, you can begin launching junior orders from it. Because you have already identified the products and quantities needed, creating a junior order is a simple process. You use the Job Bid Tracking screen to enter the quantities to order, and then launch a new sales order. The system populates the order with the products and quantities you selected, so all you have to do is complete the order as usual.

When you create a junior order, the system updates the information on the Sales Order Entry Header screen to match the information on the master job bid. The only way to sever the link between a junior order and a master job bid is to cancel the junior order and re-enter it as a regular sales order.

**Note:** The Change Both COGS And COMM-COST On Override and the Direct COGS Always Vendor Price control maintenance record settings do not apply to junior orders.

### ► To create a junior order for stock items:

1. Create or open a master job bid.
2. If this is the first junior order generated from this master job bid, update the project status.
3. From the Sales Order Entry Body screen, use the **Mode** hot key, select **Job Bid Tracking** from the list, and press **Enter** to display the Select Product Type selection list.
4. Select **Stock Products** and press **Enter** to display the Job Bid Tracking screen.
5. Review the products, as needed.
6. In the **OrderQty** field, enter the amount of a selected product to purchase.

Depending on your system setup, the system may warn you if the total cost of the items you order exceeds the total estimated cost on the master job bid.

7. Do one of the following:

To create a...	Use this hot key...
sales order bid	<b>Create New</b> The Sales Order Entry Body screen displays in Bid mode.
direct ship order	<b>Dir</b> The Purchase Order Entry Header screen displays.

8. Complete the bid or direct order and press **Esc** to return to the Job Bid Tracking screen.

The system recalculates the product quantities based on your selection. If you selected **Create New**, the ordered amount displays in the **Open Qty** field. If you selected **Dir**, the ordered amount displays in the **Ship Qty** field. If you did not order the entire quoted amount, the remaining quoted quantity displays in the **RemQty** field.

9. Press **Esc** to return to the master job bid on the Sales Order Entry Body screen.
10. When you are finished working with the order, press **Esc** to display the Sales Order Entry Status screen.

Verify that the status reflects your project status, for example, **Bid-In Process**. If the status is not correct, use the **Body** hot key and see Updating Project Statuses.

11. Press **Esc** to exit the screen.

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**See Also:**

Junior Orders Overview

Creating Junior Orders for Lot Items

## Creating Junior Orders for Lot Items

After you create your master job bid for the project and the customer approves the quote, you can begin entering junior orders against it. Because you have already identified the products and quantities needed, creating a junior order is a simple process. You use the Job Bid Tracking screen to launch a new lot item order. The system populates the order with the lot item. You then enter the materials and quantities on the Lot Job Bid Tracking screen.

When you create a junior order, the system updates the information on the Sales Order Entry Header screen to match the information on the master job bid.

**Note:** The only way to sever the link between a junior order and a master job bid is to cancel the junior order and re-enter it as a regular sales order.

### ►To create a junior order for lot items:

1. Create or open a master job bid that includes a lot item.
2. If this is the first junior order generated from this master job bid, update the project status.
3. On the Sales Order Entry Body screen, use the **Mode** hot key, select **Job Bid Tracking** from the list, and press **Enter** to display the Select Product Type selection list.
4. Select **Lot Products** and press **Enter** to display the Job Bid Tracking screen.
5. In the **OrderQty** field, enter **1** (one) next to the lot item to purchase.
6. Do one of the following:

To create a...	Use this hot key...
sales order bid	<b>Create New</b> The Sales Order Entry Body screen displays in Bid mode.
direct ship order	<b>Dir</b> The Purchase Order Entry Header screen displays. Enter the vendor information and press <b>Esc</b> to display the Sales Order Entry Body screen.

7. Use the **NonStk/Lot** hot key to display the Lot Item Status screen.
8. Use the **Material Detail** hot key to display the Lot Item Material Detail screen.
9. Use the **Job Bid Tracking** hot key to display the Lot Job Bid Tracking screen.
10. In the **OrdQty** column, enter the quantity of the lot item materials to add to the junior order.
11. Use the **Add to Junior** hot key to display the selected quantities on the Lot Item Material Detail screen.
12. Add Type/Tags and SubTypes to the materials, as needed.

13. Press **Esc** until you return to the Sales Order Entry Body screen.
14. Complete the bid or direct order and press **Esc** to return to the Job Bid Tracking screen.  
The system moves the lot item quantity based on your selection. If you selected **Create New**, the ordered amount displays in the **Open Qty** field. If you selected **Dir**, the ordered amount displays in the **Ship Qty** field.
15. Press **Esc** to return to the master job bid on the Sales Order Entry Body screen.
16. When you are finished working with the order, press **Esc** to display the Sales Order Entry Status screen.  
Verify that the status reflects your project status, for example, **Bid-In Process**. If the status is not correct, use the **Body** hot key and see Updating Project Statuses.
17. Press **Esc** to save the information and exit the screen.

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**See Also:**

Junior Orders Overview

Creating Junior Orders for Stock Items

## Master Job Bid Maintenance Overview

The system provides five methods for monitoring your master job bids.

Use either of the following screens to view summary information for each order, and to drill down into the order itself to view or edit details:

- Master Job Bid Review Queue
- Job Bid Tracking

Use either of the following screens to monitor the progress of the master job bid toward completion:

- Job Bid Totals Summary
- Job Bid Progress Report

In addition, you can view any changes made to the master job bid, including lot items, on the Master Job Bid Log Viewing screen, and any changes made to lot item materials on the Lot Billing Change Log screen.

### Master Job Bid Review Queue

Use the Master Job Bid Review Queue to list the master job bids for a specific project manager or customer. You can further limit the number of records that display by entering additional selection criteria, such as dates and project status information.

If the master job bid has junior orders or change orders entered against it, the system highlights the corresponding hot keys to alert you to them.

The Junior Job Bid Review screen lists all of the junior orders entered against the master job bid. You can view extensive summary totals and the progress of each junior order, and drill-down into the order to view or edit details.

### Job Bid Tracking

Use the Job Bid Tracking screen to view the status of the products on the bid along with their quantities. You can either view stock products or lot items. The screen shows the quoted quantities for each product, along with the amount that has shipped to the customer, the amount committed to the job bid, and the amount of the quoted quantity that remains unshipped and uncommitted.

When you view lot items, you will see only the placeholder product. To view the list of materials on that lot item, you must access the Lot Job Bid Tracking screen within the Lot Billing application. This screen is accessible only from a master job bid, junior order, or change order.

## Job Bid Totals Summary

Use the Job Bid Totals Summary screen to view all sales and purchases made against a master job bid. The screen lists original and actual dollar amounts, and displays all junior orders associated with the master job bid, along with their totals.

## Job Bid Progress Report

The Master Job Bid Progress Report shows what progress has been made toward billing and delivering the products on a master job bid (MJB). The report displays the original price along with the effect of change orders on the current price, and compares the projected billings to the actual invoice totals. If you select **Detail** mode, it also displays all of the invoices generated for the MJB.

This report can be run in stand-alone mode or from within the Master Job Bid Review Queue. If you run the stand-alone version, you can choose a set of MJBs on which to report, based on the customer, the project status, the expected completion date, or a followup date. The queue version can be run for a selected MJB only.

---

**See Also:**

Master Job Bid Entry Overview

## Reviewing Master Job Bid Totals

Use the Job Bid Totals Summary screen to view all sales and purchases made against a master job bid. The screen lists original and actual dollar amounts, and displays all junior orders associated with the master job bid, along with their totals.

### ► To review master job bid sales and purchasing totals:

1. Create or open a master job bid.
2. From the Sales Order Entry Body screen, use the **Inq** hot key and then the **Job Totals** hot key, to display a selection list.
3. Select **Job Summary Totals** from the list to display the Job Bid Totals Summary screen.
4. Review the following fields, as needed:

Field	Description
<b>Master Order #</b>	A number that identifies the master job bid from which this inquiry was accessed.
<b>Customer Name</b>	The name of the individual or company for which the master job bid was created.
<b>Customer P/O#</b>	The number from the customer's purchase order for the master job bid.
<b>Estimated Price</b>	An estimate of the master job bid price entered on the Job Maintenance screen when the master job bid was created.
<b>MJB Price Total</b>	The actual dollar amount quoted on the master job bid, based on the quantities of the products requested.
<b>Open Price</b>	The dollar amount for products on junior orders that have not yet shipped.
<b>Invoiced Price</b>	The dollar amount for products on junior orders that have shipped and been invoiced.
<b>Price Balance</b>	The remaining quoted dollar amount not ordered or invoiced. <b>Price Balance = [MJB Total - (Open Amt + Invoiced Amt)]</b>  <b>Note:</b> If this amount is not equal to <b>0</b> (zero), some quantities/prices have not been entered on a junior order.
<b>Estimated GP%</b>	The gross profit percentage calculated from the estimated price and estimated cost.
<b>Estimated Cost</b>	An estimate of the master job bid cost entered on the Job Maintenance screen when the master job bid was created.
<b>MJB Cost Total</b>	The actual dollar amount you owe to the vendor if the customer orders all of the quantities of all of the products on the master job bid.
<b>Open Cost</b>	The dollar amount you will owe to the vendor when the products on the order ship to the customer.
<b>Invoiced Cost</b>	The dollar amount you owe to the vendor for shipped products.
<b>Cost Balance</b>	The remaining quoted cost not ordered or invoiced. <b>Cost Balance = MJB Total - (Open Amt + Invoiced Amt)]</b>  <b>Note:</b> If this amount is not equal to <b>0</b> (zero), some quantities/costs have not been spawned to a junior order.

Field	Description
<b>Actual GP%</b>	The actual percentage of the revenue your company has received as profit to date for shipped and invoiced products on the master job bid.

6. Review the following price totals for each junior order:

Field	Description
<b>Junior Orders</b>	A number that identifies a junior order attached to the master job bid.
<b>Bid</b>	The total dollar amount of the items on a junior bid.
<b>Direct</b>	The total dollar amount of the items on a direct shipment junior order.
<b>Stock</b>	The total dollar amount of the items on a junior order that will ship from your inventory.
<b>Not Printed</b>	The dollar amount for shipped items for which no invoice has been generated as of yet.
<b>Printed</b>	The dollar amount for shipped items that have been invoiced.
<b>Junior Totals</b>	The total price of all junior orders spawned from this master job bid.

**Note:** Depending on your system setup, the system may warn you if the total cost of the items you order exceeds the total estimated cost on the master job bid.

To toggle between price totals and cost totals for each junior order, use the **Junior View** hot key. The area next to the hot key identifies which dollar amounts are currently visible.

7. Press **Esc** to exit the screen.

### More Options for Reviewing Junior Orders

The Job Bid Totals Summary screen also offers these options:

To...	Use this hot key...
edit a selected junior order	<b>Edit Order</b> The Sales Order Entry Body screen displays.
view a selected junior order	<b>View Order</b> The Sales Order Entry Body screen displays in view-only mode.

---

### See Also:

Master Job Bids Overview

Reviewing Master Job Bid Price and Cost Totals

## Reviewing Master Job Bid Record Changes

Use the Master Job Bid Log Viewing screen to review who entered what transaction against the master job bid. You can view when the transaction was entered, along with all of the changes that affected the value of the item. This log includes both stock and lot items.

### ► To review changes made to a master job bid:

1. Open a master job bid.
2. From the Sales Order Entry Body screen, use the **Inq** hot key, and then the **Job Totals** hot key, select **MJB Log Overview** from the list, and press **Enter** to display the Master Job Bid Log Viewing screen.
3. Review the following for each transaction:

Column	Description
<b>Update Log for</b>	The sales order number and a description of the item.
<b>User ID</b>	The log in ID of the employee who made the change.
<b>Date</b>	The date the employee made the change.
<b>Time</b>	The time the employee made the change.
<b>Comment</b>	A system-generated description of each change.
<b>Amount</b>	The dollar amount added to or subtracted from the master job bid.

4. Use the **Change View** hot key to view additional columns, as needed.
5. Press **Esc** to exit the screen.

### More Options for Reviewing Master Job Bid Record Changes

The Master Job Bid Log Viewing screen also offers these options:

To...	Use this hot key...
View a junior order that caused a change log entry, select a line that includes an order number and	<b>View Item</b> The Sales Order Entry Body screen displays in view-only mode.
Edit a junior order that caused a change log entry, select a line that includes an order number and	<b>Edit Item</b> The Sales Order Entry Body screen displays.
Print the log	<b>Print</b>
Save the log to your Hold file for later viewing or printing	<b>Hold</b>
Review or change printing options	<b>Options</b> A list of printing options displays.

**Note:** The **Add Comment** hot key is not accessible from this screen. This screen is shared with the Lot Billing Change Log, on which users can add comments to log entries.

---

**See Also**

Reviewing Master Job Bid Lot Item Status Updates

## Reviewing Master Job Bid Lot Item Status Updates

Use the Lot Billing Change Log to determine who made what change to essential lot item information, such as its description, customer price, vendor cost, follow up date, and estimated completion date.

► **To review updates made to a lot billing item:**

1. Open a master job bid that includes a lot item.
2. From the Sales Order Entry Body screen, select the lot item and use the **NonStk/Lot** hot key to display the Lot Item Status screen.
3. Use the **Lot Change Log** hot key to display the Lot Billing Change Log screen.
4. Review the following information for each update, as needed:

Column	Description
<b>Update Log For</b>	The sales order number and a description of the item.
<b>User ID</b>	The log in ID of the user who made the change.
<b>Date</b>	The date the user made the change.
<b>Time EDT or Time</b>	The time the user made the change.

5. Use the **Change View** hot key to view additional columns, as needed.
6. Press **Esc** to exit the screen.

### More Options for Reviewing Lot Item Status Updates

The Lot Billing Change Log Screen also offers these options:

To...	Use this hot key...
Print the log or ledger	<b>Print</b>
Save the log or ledger to your Hold file for later viewing or printing	<b>Hold</b>
Review or change printing options	<b>Options</b>
Add a comment to a selected entry or a blank line	<p><b>Add Comment</b> The Reason for Change screen displays. Enter your comment and press <b>Esc</b> to add it to the log.</p> <p><b>Note:</b> This hot key works only with the <b>General Comments</b> and <b>Billing Comments</b> screen views.</p>

**See Also:**

Master Job Bids Overview

Reviewing Lot Item Materials on Master Job Bids

Reviewing Master Job Bid Record Changes

## Reviewing Master Job Bids

Use the Master Job Bid Review Queue screen to view all of the projects for a project manager or customer. This screen shows the status of each project, along with an estimate of its completion date. If you have authorization, you can also view the prices and costs associated with each bid.

To view product quantity details, use the Job Bid Tracking screen.

### ► To review master job bids:

1. From the **Orders > Queues** menu, select **Master Job Bid Review Queue** to display the Master Job Bid Review Queue screen.

**Note:** This screen is also available from the **Files > Job Bid** menu.

2. Complete one or both of the following fields:
  - **Project Manager** – Enter the user ID of the person responsible for maintaining the master job bid projects under review.
  - **Customer** – Enter the name of the individual or company for whom you created the master job bids.
3. To further narrow your search, complete any of the following fields:

Field	Description
<b>Project Status</b>	The status of this master job bid project. Values are user-defined.
<b>Follow-Up Date</b>	The next date to review the master job bid.
<b>Expected Date</b>	The date the customer expects to complete the project.

**Note:** To update the information in these fields, see Updating Project Statuses.

4. From the **Expected Date** field, press **Enter** to display a list of master job bids that match your search criteria.
5. Review the following, as needed:

Column	Description
<b>Master Orders</b>	A letter <b>S</b> (sales order) followed by a series of numbers that identify the master job bid.
<b>Customer</b>	The individual or company for whom you created the master job bid.
<b>Project Status</b>	The current status of the job.
<b>Follow-Up</b>	The next date to review the master job bid.
<b>ExpectDate</b>	The date the customer expects to complete the project.

6. To re-sort the list, use the **Sort By** hot key and select one of the following from the list:
  - **Follow-Up Date** – Sorts from the earliest date to the most recent date.

- Expected Date – Sorts from the earliest date to the most recent date. This sorting method is the default.
  - Customer – Sorts alphabetically in ascending order.
  - Order – Sorts from the smallest order number to the largest order number.
7. Press **Esc** to clear the screen. The project manager's user ID remains in the **Project Manager** field.

---

**See Also:**

Viewing or Editing Master Job Bids

Reviewing Master Job Bid Price and Cost Totals

Reviewing Junior Orders for a Master Job Bid

## Viewing or Editing Master Job Bids

You can find master job bids using the Sales Order Entry Body screen, but you may find it easier to locate them if you access them from the Master Job Bid Review Queue. You call up a list of orders and then use a hot key to drill down into the order. Because you have the benefit of viewing the master job bid's related junior orders, you can more easily determine whether the master job bid is the one with which you want to work.

### ► To view or edit a master job bid:

1. From the **Orders > Queues** menu, select **Master Job Bid Review Queue** to display the Master Job Bid Review Queue screen.

**Note:** This screen is also available from the **Files > Job Bid** menu.

2. Complete one or both of the following fields:
  - **Project Manager** – Enter the user ID of the person responsible for maintaining the master job bid projects under review.
  - **Customer** – Enter the name of the individual or company for whom you created the master job bids.
3. From the **Expected Date** field, press **Enter** to display a list of master job bids.
4. Review the list of master job bids, as needed.
5. Position the cursor on a master job bid and do one of the following:

To...	Use this hot key...
view the master job bid	<b>View Order</b> The Sales Order Entry Body screen displays in view-only mode.
edit the master job bid	<b>Edit Order</b> The Sales Order Entry Body screen displays. <b>Note:</b> The SOE.MASTER.BID.EDIT authorization key indicates whether you have authorization to edit MJBs.

6. Press **Esc** to clear the screen.

---

### See Also:

Viewing or Editing Junior Orders

## Reviewing Master Job Bid Price and Cost Totals

From the Master Job Bid Review Queue, you can select an alternate view that shows the total price and cost totals along with an estimate of the gross profit percentage your company can expect to receive upon completion of the project.

### ► To review price and cost totals for a master job bid:

1. From the **Files > Job Bid** menu, select **Master Job Bid Review Queue** to display the Master Job Bid Review Queue screen.
2. Complete one or both of the following fields:
  - **Project Manager** – Enter the user ID of the person responsible for maintaining the master job bid projects under review.
  - **Customer** – Enter the name of the individual or company for whom you created the master job bids.
3. Complete other fields, as needed.
4. From the **Expected Date** field, press **Enter** to display a list of master job bids.
5. Use the **Change View** hot key and select **Sales / COGS** from the list to change the column view.
6. Review the following, as needed:

Column	Description
<b>Sales \$</b>	The total original product sales for the project.
<b>COGS</b>	The total original product costs incurred for the project.
<b>GP %</b>	The original percentage of the sale your company receives as profit for sales of the products on the master job bid, based on the cost of goods sold.

7. Press **Esc** to clear the screen.

---

### See Also:

Reviewing Master Job Bids

Viewing or Editing Master Job Bids

## Reviewing Junior Orders for Master Job Bids

When you enter junior orders against a master job bid, use the Junior Job Bid Review screen to review information about them, such as their status or when they were scheduled for shipment. You can also use this screen to drill down into the junior order itself to review or edit the details.

### ► To review junior orders for a master job bid:

1. From the **Orders > Queues** menu, select **Master Job Bid Review Queue** to display the Master Job Bid Review Queue screen.

**Note:** This screen is also available from the **Files > Job Bid** menu.

2. Complete one or both of the following fields:
  - **Project Manager** – Enter the user ID of the person responsible for maintaining the master job bid projects under review.
  - **Customer** – Enter the name of the individual or company for whom you created the master job bids.
3. From the **Expected Date** field, press **Enter** to display a list of master job bids.
4. Review the list of master job bids, as needed.
5. Position the cursor on a master job bid and use the **View Jr** hot key to display the Junior Job Bid Review screen.
6. Review the following fields, as needed:
  - **Customer** – The name of the individual or company for whom the master job bid was created.
  - **Master #** – The number that identifies the master job bid from which these junior orders were created.
7. Review the following information, as needed:

Column	Description
<b>Junior Orders</b>	A number that identifies a junior order that is attached to the master job bid.
<b>Sales \$</b>	The dollar amount generated from the sale of the products on the junior order.
<b>COGS</b>	The total cost incurred for the products on the junior order.
<b>GP %</b>	The percentage of the sales amount your company receives as profit, based on the cost of goods sold.
<b>Stat (Junior Status)</b>	The order status of the junior order. Junior Orders can have a status of <b>Bid</b> , <b>Direct Shipment</b> , or <b>Canceled</b> .

8. Press **Esc** to clear the screen.

### More Options for Reviewing Junior Orders

The Junior Job Bid Review screen also offers these options:

To...	Use this hot key...
edit a selected junior order	<b>Edit Order</b> The Sales Order Entry Body screen displays. You must have the SOE.MASTER.BID.EDIT authorization key assigned to edit junior orders.
review a selected junior order	<b>View Order</b> The Sales Order Entry Body screen displays in view-only mode.
view additional shipment status information	<b>Chg View</b> Different columns display depending on your selection.

---

#### See Also:

Junior Orders Overview

Reviewing Junior Order Products

Creating Junior Orders for Lot Items

Creating Junior Orders for Stock Items

## Updating Project Statuses

As you progress through the different stages of a project, you may want to keep track of them by changing the project status. All project statuses are defined by your company using the Valid Master Job Bid Statuses control maintenance record, so you can customize them to meet your needs.

### ► To update the status of a master job bid:

1. Open a master job bid.
2. From the Sales Order Entry Body screen, use the **Header** hot key to display the Sales Order Entry Header screen.
3. Change information, as needed.
4. Use the **Add'l** hot key, and then the **Job Maintenance** hot key to display the Job Maintenance screen.
5. In the **Project Status** field, enter the new status of the project.

For example, if you are going to enter your first junior order against the master job bid, change the status to **In Process** or something similar.

**Note:** Project statuses are user-defined, so you may not have the suggested status in your selection list.

6. Change other information, as needed:

Field	Description
<b>Project Manager</b>	The user ID of the person responsible for maintaining this master job bid project.
<b>Follow-Up Date</b>	The next date to review the master job bid. You can review master job bids by follow-up date on the Master Job Bid Review Queue screen.
<b>Expected Date</b>	The date by which the customer expects to finish the project.
<b>Consolidated Invoicing</b>	A method of printing invoices that combines the billings for several orders. To use this feature, enter <b>Y</b> ; otherwise, enter <b>N</b> . For more information, see Printing Consolidated Invoices.
<b>Allow Dup Type-SubType</b>	Identifies whether to allow duplicate Type/Tags and SubTypes when adding lot item materials to the master job bid. Enter <b>Yes</b> to allow duplicates; otherwise, enter <b>No</b> . For more information, see Type/Tag and SubType Concepts.

7. Press **Esc** to save the information and exit the screen. Press **Esc** repeatedly until you return to the Sales Order Entry Body screen.
8. When you are finished working with the order, press **Esc** to display the Sales Order Entry Status screen.

Verify that the status is **Bid-*<your new user-defined status>***.

9. Press **Esc** to exit the screen.

---

**See Also:**

Creating Junior Orders for Lot Items

Creating Junior Orders for Stock Items

## Canceling Master Job Bids

When you need to cancel a master job bid, you must first cancel the associated junior orders. The most convenient way to cancel all of the orders on a master job bid is to begin from the Master Job Bid Review Queue.

When you change the master job bid's status from Bid to Cancel, the system warns you that canceling the master job bid breaks all links to any junior orders. Any uncanceled junior orders will continue to exist, but you will no longer have a convenient way to track them.

This topic includes the following instructions:

- Canceling a junior order
- Canceling a master job bid

### ▶ To cancel a junior order attached to a master job bid:

1. Open a junior order.

**Note:** You can cancel a junior generation only if:

- It includes only lot items for which no material detail has been added and is one of two or more open generations.
  - It includes only lot items for which no material detail has been added, all generations are closed, and \$0 have been invoiced.
2. From the Sales Order Entry Body screen, press **Esc** to display the Sales Order Entry Status screen.
  3. In the **Order Status for <order number>** field, type **X** over the current status to change it to **Canceled**. If prompted, enter **Y** to confirm that you are canceling the open ship date.
  4. Press **Esc** to return to the Master Job Bid Review Queue screen. If prompted, enter a reason for the change, such as: **Customer canceled order**.

### ▶ To cancel a master job bid:

1. From the **Orders > Queues** menu, select **Master Job Bid Review Queue** to display the Master Job Bid Review Queue screen.
2. In the **Customer** field, enter the name of the customer whose master job bid you want to cancel.
3. Select the master job bid and use the **Edit Order** hot key to display the Sales Order Entry Body screen.

**Note:** You can cancel a master job bid only if it has no junior orders associated with it.

4. Press **Esc** to display the Sales Order Entry Status screen.

5. In the **Order Status for <order number>** field, type **X** over the **Bid** status to change it to **Canceled**. If prompted, enter **Y** to confirm that you are aware that canceling the master job bid severs its links to any related junior orders. If prompted again, enter **Y** to confirm that you are canceling the open ship date.
6. Press **Esc** to return to the Master Job Bid Review Queue screen. If prompted, enter a reason for the change, such as: **Customer canceled order**.

---

**See Also:**

Master Job Bid Entry Overview

Converting Master Job Bids to Sales Orders

## Converting Master Job Bids to Sales Orders

You can use the Job Maintenance screen to change a master job bid back to a regular sales order, provided no junior orders have been launched from it.

► **To convert a master job bid back to a sales order:**

1. Open a master job bid.
2. From the Sales Order Entry Body screen, use the **Header** hot key to display the Sales Order Entry Header screen.
3. Change information, as needed.
4. Use the **Add'l** hot key, and then the **Job Maintenance** hot key to display the Job Maintenance screen.
5. In the **Master Order** field, enter **N**.

**Note:** You can convert the master job bid only if it has no junior orders associated with it.

6. Press **Esc** until you return to the Sales Order Entry Body screen.
7. Add, remove, or change products, as needed.
8. Press **Esc** to display the Sales Order Entry Status screen.
9. In the **Order Status For <Order Number>** field, verify or change the status, if needed.
10. Press **Esc** to return to the Sales Order Entry Body screen. The screen clears for the next entry.

---

**See Also:**

Master Job Bid Entry Overview

Canceling Master Job Bids

## Tracking Project Progress

Use the Job Bid Tracking screen to track the status of the products on your master job bid. From this central location, you can view all of the products and quantities needed over the life of your job, along with information about how many quantities have been ordered or shipped, and how many are remaining.

### ► To review a product on a master job bid:

1. Create or open a master job bid.
2. On the Sales Order Entry Body screen, use the **Mode** hot key, select **Job Bid Tracking** from the list, and press **Enter** to display the Select Product Type selection list.
3. Select **Stock Products** and press **Enter** to display the Job Bid Tracking screen.

**Note:** You can also select **Lot Products**, but since lot items always have a quantity of **1** (one), you will not receive much information, other than that it has been ordered or shipped. For information about how to review the status of the materials in the lot item, see *Reviewing Lot Item Materials on Master Job Bids*.

4. Review the following information, as needed:

Column	Description
<b>Current Order #</b>	A letter <b>S</b> followed by a series of numbers that identify the master job bid.
<b>Junior Order(s)</b>	A junior order that was entered against this master job bid. This number may change based on the product upon which the cursor is positioned.
<b>Product Description</b>	A description of each product on the master job bid. A double chevron (>>) indicates a negative remaining quantity or amount.
<b>QuoteQty</b>	The total quantity of the selected product the customer requested for this project.
<b>Ship Qty</b>	The quantity of the selected product that has shipped to the customer.
<b>Open Qty</b>	The quantity of the selected product on the junior bid.
<b>RemQty</b>	The quantity of the selected product yet to be ordered or shipped.
<b>UM</b>	The unit of measure used to order the product.

5. Press **Esc** to return to the master job bid on the Sales Order Entry Body screen.

**More Options for Reviewing Master Job Bids:**

The Job Bid Tracking screen also offers these options:

<b>To...</b>	<b>Use this hot key...</b>
export the master job bid product information to an MS Excel spreadsheet	<b>Export</b> The Export Column Selections screen displays.
filter the list of products	<b>Select</b> The Job Bid Product Selection screen displays.
sort the list of products	<b>Sort</b> Select one of the following from the list and press <b>Enter</b> : <ul style="list-style-type: none"> <li>• <b>Description</b> – Sorts the products by product description.</li> <li>• <b>Cost Code</b> – Sorts the products by cost code.</li> </ul>
view additional information about the products	<b>View</b> Select a column view from the list and press <b>Enter</b> .
edit a junior order attached to this master job bid	<b>Edit Order</b> The order displays on the Sales Order Entry Body screen. If more than one junior order has been entered against this master job bid, a selection list displays first. Select the order to edit and press <b>Enter</b> .  <b>Note:</b> You must have the SOE.MASTER.BID.EDIT authorization key assigned to edit junior order.
view a junior order attached to this master job bid	<b>View Order</b> The order displays on the Sales Order Entry Body screen in view-only mode. If more than one junior order has been entered against this master job bid, a selection list displays first. Select the order to edit and press <b>Enter</b> .

**See Also:**

Master Job Bid Maintenance Overview

## Selecting Job Bid Tracking Screen Views

You can change the columns on the Job Bid Tracking screen to display a variety of information. For example, you can change to a view that shows costs, cost codes, prices, or product quantities.

Use the following screen views to track the product statuses of your master job bids:

- Quantities
- Cost Codes
- Prices
- Costs

### ► To view product quantities:

1. Review the master job bid products.
2. Use the **View** hot key and select **Quantities** from the list.

**Note:** This view is the default.

3. Review the following information, as needed:

Column	Description
QuoteQty	The total quantity of the selected product the customer requested for this project.
Ship Qty	The quantity of the selected product that has shipped to the customer.
Open Qty	The quantity of the selected product on the junior bid.
RemQty	The quantity of the selected product yet to be ordered or shipped.

### ► To view product cost codes:

1. Review the master job bid products.
2. Use the **View** hot key and select **Cost Code** from the list.
3. Review the following information, as needed:

Column	Description
QuoteQty	The total quantity of the selected product the customer requested for this project.
Ship Qty	The quantity of the selected product that has shipped to the customer.
Open Qty	The quantity of the selected product on the junior bid.
CostCode	A user-defined code that identifies the phase of the project and the types of products used during the project. For more information, see Cost Code Concepts.

▶ **To view product price information:**

1. Review the master job bid products.
2. Use the **View** hot key and select **Prices** from the list.
3. Review the following information, as needed:

Column	Description
<b>Quote Price</b>	The total quoted price for the specified quantity of product on the master job bid.
<b>BilledPrice</b>	The total amount billed to the customer to date for the shipped quantity of the product.
<b>Diff Price</b>	The amount that has not yet been billed to the customer.

▶ **To view product cost information:**

1. Review the master job bid products.
2. Use the **View** hot key and select **Costs** from the list.
3. Review the following information, as needed:

Column	Description
<b>Quote Cost</b>	The total quoted amount you owe the vendor if the customer orders the entire quantity.
<b>Billed Cost</b>	The total amount the vendor has invoiced you for his shipped products.
<b>Diff Cost</b>	The amount that has yet to be invoiced.

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**See Also:**

Reviewing Junior Order Products

## Filtering the List of Master Job Bid Products

When you have hundreds of items on a master job bid, you may want to limit the number of records that display. This will prevent you from having to scroll through the list trying to find a specific product or group of products to add to a junior order. Use the Job Bid Selection screen to identify specific criteria, such as a cost code group, to use to reduce the number of products that display.

### ► To filter the list of products on a master job bid:

1. Create or open a master job bid.
 

**Note:** You can also do this from within a junior order, or from the Lot Job Bid Tracking screen.
2. On the Sales Order Entry Body screen, use the **Mode** hot key, select **Job Bid Tracking** from the list, and press **Enter** to display the Select Product Type selection list.
3. Select one of the following product types and press **Enter** to display the Job Bid Tracking screen:
  - **Stock Products** – Displays all inventory items on the master job bid.
  - **Lot Products** – Displays all lot items on the master job bid.
4. Use the **Select** hot key to display the Job Bid Selection screen.
5. Complete any of the following fields:

Field	Description
<b>Description</b>	A keyword that describes the product to locate.
<b>Cost Code</b>	A user-defined number that identifies a group of products by price or project stage. For more information, see Cost Code Concepts.
<b>Quote Qty</b>	The quantity of an item on the master job bid.
<b>Ship Qty</b>	The quantity of an item that has shipped to the customer.
<b>Open Qty</b>	The quantity of an item that has been ordered but not yet shipped.
<b>Remaining Qty</b>	The quantity of an item that has not been ordered or shipped.
<b>Quote Price</b>	The price you quoted to the customer for a product.
<b>Billed Price</b>	The actual price you billed to the customer for a product.
<b>Price Diff</b>	The difference between a quoted price and the billed price.
<b>Quote Cost</b>	The price the vendor quoted to you for a product.
<b>Billed Cost</b>	The price the vendor billed you for a product.
<b>Cost Diff</b>	The difference between the quoted vendor price and the billed vendor price.

6. Press **Esc** to display products that match your search criteria on the Job Bid Tracking screen.

### More Options for Filtering Products

The Job Bid Selection screen also offers these options:

To...	Use this hot key...
enter multiple search values for a selected search parameter	<b>Multiple Values</b> The Multiple Values screen displays. Enter each value on a separate line and press <b>Esc</b> . The system populates the selected field with <b>*Multi*</b> .
remove all values from the Job Bid Selection screen	<b>Clear Select</b>

---

#### See Also:

Tracking Project Progress

Reviewing Junior Order Products

Filtering the List of Master Job Bid Lot Item Materials

Exporting Master Job Bid Information

## Exporting Master Job Bid Information

You can export master job bid information to a Microsoft® Excel spreadsheet. Use this feature to manipulate the data and share this information with your customers and vendors.

The export feature gives you complete control over the information's formatting. You can select which columns of information to include, in what order, and rename the columns whatever you like. The system remembers your settings the next time you use the export feature.

### ► To export order information:

1. Create or open a master job bid.
 

**Note:** You can also do this from within a junior order, or from the Lot Job Bid Tracking screen.
2. On the Sales Order Entry Body screen, use the **Mode** hot key, select **Job Bid Tracking** from the list, and press **Enter** to display the Select Product Type selection list.
3. Select one of the following product types and press **Enter** to display the Job Bid Tracking screen:
  - **Stock Products** – Displays all inventory items on the master job bid.
  - **Lot Products** – Displays all lot items on the master job bid.
4. Filter the list of products as needed to eliminate any products you do not want to export to the spreadsheet.
5. Use the **Export** hot key to display the Export Column Selection screen.
6. Do any of the following, as needed:

To...	Use this hot key...
add columns to the spreadsheet, in the <b>Columns Not Exported</b> column, select a column name and	<b>Shift Columns</b> The selected column name moves to the <b>Columns Exported to Excel</b> column.
remove columns from the spreadsheet, in the <b>Columns Exported to Excel</b> column, select a column name and	<b>Shift Columns</b> The selected column name moves to the <b>Columns Not Exported</b> column.
change the order in which columns display on the spreadsheet, select a column name and	<b>Move Up</b> or <b>Move Down</b>

7. To change a column name, select it and type the new information over the old.
 

To restore the column description to its original name, use the **Reset** hot key, select an option from the list, and press **Enter**.
8. To export the information, use the **Export** hot key to display the Select File window.
9. Browse to your C: drive.

**Note:** The system does not recognize paths that are more complex.

10. In the **File Name** field, enter a name that describes the spreadsheet.
11. Click **Open** to display the requested information in the Excel spreadsheet.

---

**See Also:**

Tracking Project Progress

Reviewing Junior Order Products

## Reviewing Junior Order Products

Use the Job Bid Tracking screen to manage your junior orders. From this central location, you can view all of the products and quantities that have been ordered or shipped, and how many are remaining.

### ►To review a product on a junior order:

1. Create or open a junior order.
2. On the Sales Order Entry Body screen, use the **Mode** hot key, select **Job Bid Tracking** from the list, and press **Enter** to display the Select Product Type selection list.
3. Select **Stock Products** and press **Enter** to display the Job Bid Tracking screen.

**Note:** You can also select **Lot Products**, but since lot items always have a quantity of **1** (one), you will not receive much information, other than that it has been ordered or shipped. For information about how to review the status of the materials in the lot item, see *Reviewing Lot Item Materials on Master Job Bids*.

4. Review the following information, as needed:

Column	Description
<b>Current Order #</b>	A letter <b>S</b> followed by a series of numbers that identify the junior order.
<b>Master Job Bid</b>	The master job bid against which this junior order was entered.
<b>Product Description</b>	A description of each product on the master job bid. A double chevron (>>) indicates a negative remaining quantity or amount.
<b>QuoteQty</b>	The total quantity of the selected product the customer requested for this project.
<b>Ship Qty</b>	The quantity of the selected product that has shipped to the customer.
<b>Open Qty</b>	The quantity of the selected product on a junior bid or order.
<b>RemQty</b>	The quantity of the selected product yet to be ordered or shipped.
<b>UM</b>	The unit of measure used to order the product.

5. Press **Esc** to return to the junior order on the Sales Order Entry Body screen.

### More Options for Reviewing Junior Orders:

The Job Bid Tracking screen also offers these options:

To...	Use this hot key...
export the master job bid product information to an MS Excel spreadsheet	<b>Export</b> The Export Column Selections screen displays.
filter the list of products	<b>Select</b> The Job Bid Product Selection screen displays.

To...	Use this hot key...
sort the list of products	<b>Sort</b> Select one of the following from the list and press <b>Enter</b> : <ul style="list-style-type: none"> <li>• <b>Description</b> – Sorts the products by product description.</li> <li>• <b>Cost Code</b> – Sorts the products by cost code.</li> </ul>
view additional information about the products	<b>View</b> Select a column view from the list and press <b>Enter</b> .

---

**See Also:**

Junior Orders Overview

Reviewing Junior Orders for a Master Job Bid

Creating Junior Orders for Lot Items

Creating Junior Orders for Stock Items

## Reviewing Lot Item Materials on Master Job Bids

Use the Lot Job Bid Tracking screen to manage a lot item on a master job bid. From this central location, you can view all of the lot item materials and quantities needed over the life of the project. This screen is similar to the Job Bid Tracking screen.

### ► To review lot items materials for a master job bid:

1. Open the master job bid or junior order for the lot item.
2. Select a lot item and use the **NonStk/Lot** hot key to display the Lot Item Status screen.
3. Review the total lot cost and lot price, as needed.
4. Use the **Material Detail** hot key to display the Lot Item Material Detail screen.
5. Use the **Job Bid Tracking** hot key to display the Lot Job Bid Tracking screen.
6. Review the following, as needed:

Column	Description
<b>Current Order #</b>	A letter <b>S</b> followed by a series of numbers that identify the master job bid, junior order, or change order.
<b>Junior Order(s)</b>	A junior order that was entered against this master job bid. This number may change based on the product upon which the cursor is positioned. Displays if you accessed this screen from a master job bid.
<b>Master Job Bid</b>	The order number for the master job bid from which this junior order or change order was created. Displays if you accessed this screen from a junior order or change order.
<b>Product Description</b>	A description of each material on the lot item. A double chevron (>>) indicates a negative remaining quantity or amount.
<b>QuoteQty</b>	The total quantity of the selected product the customer requested for this project.
<b>Ship Qty</b>	The quantity of the selected product that has shipped to the customer.
<b>Open Qty</b>	The quantity of the selected product on the junior bid.
<b>RemQty</b>	The quantity of the selected product yet to be ordered or shipped.
<b>UM</b>	The unit of measure used to order the material. This is always asterisks (**) for lot items.

7. Press **Esc** to exit the screen.

### More Options for Reviewing Lot Item Materials for Master Job Bids

The Lot Job Bid Tracking screen also offers these options:

To...	Use this hot key...
export the master job bid product information to an MS Excel spreadsheet	<b>Export</b> The Export Column Selections screen displays.

To...	Use this hot key...
filter the list of materials	<b>Select</b> The Job Bid Product Selection screen displays.
sort the list of materials	<b>Sort</b> Select one of the following from the list and press <b>Enter</b> : <ul style="list-style-type: none"> <li>• <b>Description</b> – Sorts the products by product description.</li> <li>• <b>Tag Type</b> – Sorts the products by Tag Type and SubType.</li> </ul>
view additional information about the materials	<b>View</b> Select a column view from the list and press <b>Enter</b> .
edit a junior order attached to this master job bid	<b>Edit Order</b> The order displays on the Sales Order Entry Body screen. If more than one junior order has been entered against this master job bid, a selection list displays first. Select the order to edit and press <b>Enter</b> .  <b>Note:</b> You must have the SOE.MASTER.BID.EDIT authorization key assigned to edit junior order.
view a junior order attached to this master job bid	<b>View Order</b> The order displays on the Sales Order Entry Body screen in view-only mode. If more than one junior order has been entered against this master job bid, a selection list displays first. Select the order to edit and press <b>Enter</b> .

---

**See Also:**

Master Job Bids Overview

Reviewing Master Job Bid Lot Item Status Updates

Creating Junior Orders for Lot Items

## Filtering the List of Master Job Bid Lot Item Materials

When you have many materials on a lot item, you may want to limit the number of records that display. This will prevent you from having to scroll through the list trying to find a specific material or group of materials to add to a junior order. Use the Job Bid Selection screen to identify specific criteria, such as a Type/Tag or SubType, to use to reduce the number of materials that display.

### ► To filter the list of materials on a lot item:

1. Create or open a master job bid that includes a lot item.  
**Note:** You can also do this from within a junior order.
2. Position the cursor on a lot item and use the **NonStk/Lot** hot key to display the Lot Item Status screen.
3. Review the total lot cost and lot price, as needed.
4. Use the **Material Detail** hot key to display the Lot Item Material Detail screen.
5. Use the **Job Bid Tracking** hot key to display the Lot Job Bid Tracking screen.
6. Use the **Select** hot key to display the Job Bid Selection screen.
7. Complete any of the following fields:

Field	Description
<b>Description</b>	A keyword that describes the material to locate.
<b>Tag Type</b>	A user-defined code used to categorize and group the lot item materials. For more information, see Type/Tag and SubType Concepts.
<b>SubType</b>	A user-defined code used to identify lot item materials within a group. For more information, see TypeTag and SubType Concepts.
<b>Quote Qty</b>	The quantity of an item on the lot item.
<b>Ship Qty</b>	The quantity of an item that has shipped to the customer.
<b>Open Qty</b>	The quantity of an item that has been ordered but not yet shipped.
<b>Remaining Qty</b>	The quantity of an item that has not been ordered or shipped.
<b>Quote Price</b>	The price you quoted to the customer for a product.
<b>Billed Price</b>	The actual price you billed to the customer for a product.
<b>Price Diff</b>	The difference between a quoted price and the billed price.
<b>Quote Cost</b>	The price the vendor quoted to you for a material.
<b>Billed Cost</b>	The price the vendor billed you for a material.
<b>Cost Diff</b>	The difference between the quoted vendor price and the billed vendor price.

8. Press **Esc** to display products that match your search criteria on the Job Bid Tracking screen.

**More Options for Filtering Products**

The Job Bid Selection screen also offers these options:

To...	Use this hot key...
enter multiple search values for a selected search parameter	<p><b>Multiple Values</b>                      The Multiple Values screen displays. Enter each value on a separate line and press <b>Esc</b>. The system populates the selected field with <b>*Multi*</b>.</p>
remove all values from the Job Bid Selection screen	<p><b>Clear Select</b></p>

---

**See Also:**

Filtering the List of Master Job Bid Products

Exporting Master Job Bid Information



# Index

## B

bids, junior order	
about.....	16
creating	
for lot items.....	20
for stock items.....	18
launching from	
Job Bid Tracking.....	18
products.....	49
reviewing.....	34
updating status of.....	36
workflow.....	6
bids, master job	
about.....	1
converting to sales orders.....	40
cost codes	
about.....	10
adding to products.....	11
editing.....	32
entry	
about.....	4
creating.....	7
lot item materials.....	51
monitoring.....	22
products	
adding cost codes to.....	11
adding type/tags and subtypes to.....	14
exporting list of to spreadsheet.....	47
filtering list of in Job Bid Tracking...	45
filtering list of in Lot Job Bid Tracking	
.....	53

reviewing.....	41
setup requirements.....	2
totals.....	24
tracking progress of.....	41
type/tags and subtypes	
about.....	12
adding to lot item materials.....	15
adding to stock items.....	14
updating status of.....	36
viewing.....	32
workflow.....	6

## C

change logs	
lot billing	
for master job bids.....	28
master job bids	
reviewing.....	26
cost codes	
about.....	10
adding to products.....	11

## D

direct shipments, junior order	
about.....	16
creating	
for lot items.....	20
for stock items.....	18
launching from	
Job Bid Tracking.....	18
products.....	49
reviewing.....	34

updating status of ..... 36  
 workflow ..... 6

**J**

job bids, master  
 about..... 1  
 converting to sales orders..... 40  
 cost codes  
     about..... 10  
     adding to products..... 11  
 editing ..... 32  
 entry  
     about..... 4  
     creating..... 7  
 lot item materials..... 51  
 monitoring..... 22  
 products  
     adding cost codes to ..... 11  
     adding type/tags and subtypes to ..... 14  
     exporting list of to spreadsheet ..... 47  
     filtering list of in Job Bid Tracking... 45  
     filtering list of in Lot Job Bid Tracking  
         ..... 53  
     reviewing..... 41  
 setup requirements ..... 2  
 totals ..... 24  
 tracking progress of..... 41  
 type/tags and subtypes  
     about..... 12  
     adding to lot item materials..... 15  
     adding to stock items ..... 14  
 updating status of ..... 36  
 viewing..... 32  
 workflow ..... 6

junior orders  
 about..... 16  
 creating  
     for lot items ..... 20  
     for stock items..... 18  
 launching from  
     Job Bid Tracking..... 18  
 products..... 49  
 reviewing..... 34  
 updating status of ..... 36  
 workflow ..... 6

**M**

Master Job Bid Review Queue ..... 30  
 master job bids  
 about..... 1  
 converting to sales orders..... 40  
 cost codes  
     about..... 10  
     adding to products..... 11  
 editing ..... 32  
 entry  
     about..... 4  
     creating..... 7  
 lot item materials..... 51  
 monitoring..... 22  
 products  
     adding cost codes to ..... 11  
     adding type/tags and subtypes to ..... 14  
     exporting list of to spreadsheet ..... 47  
     filtering list of in Job Bid Tracking... 45  
     filtering list of in Lot Job Bid Tracking  
         ..... 53  
     reviewing..... 41

setup requirements .....	2	filtering list of in Job Bid Tracking...	45
totals .....	24	filtering list of in Lot Job Bid Tracking	
tracking progress of.....	41	.....	53
type/tags and subtypes		reviewing.....	41
about.....	12	projects, master job bid	
adding to lot item materials.....	15	about.....	1
adding to stock items .....	14	cost codes	
updating status of .....	36	about.....	10
viewing.....	32	adding to products.....	11
workflow .....	6	editing .....	32
materials		entry	
lot item		about.....	4
adding tag/types and subtypes to .....	15	creating.....	7
reviewing on master job bids .....	51	lot item materials.....	51
<b>O</b>		monitoring.....	22
orders, junior		products	
about.....	16	adding cost codes to .....	11
creating		adding type/tags and subtypes to .....	14
for lot items .....	20	exporting list of to spreadsheet .....	47
for stock items.....	18	filtering list of in Job Bid Tracking... 45	
launching from		filtering list of in Lot Job Bid Tracking	
Job Bid Tracking.....	18	.....	53
products.....	49	reviewing.....	41
reviewing.....	34	setup requirements .....	2
updating status of .....	36	totals .....	24
workflow .....	6	tracking progress of.....	41
<b>P</b>		type/tags and subtypes	
products		about.....	12
junior orders .....	49	adding to lot item materials.....	15
master job bids		adding to stock items .....	14
adding cost codes to .....	11	updating status of .....	36
adding type/tags and subtypes to .....	14	viewing.....	32
exporting list of to spreadsheet .....	47		

**Q**

queues, master job bids ..... 30

**S**

sales orders

    converting to from master job bids ..... 40

    converting to master job bids ..... 7

subtypes, type/tags and

    about..... 12

    adding to

    lot item materials..... 15

    stock items ..... 14

**T**

type/tags and subtypes

    about..... 12

    adding to

        lot item materials..... 15

        stock items ..... 14