Bid Manager Distributor Quick Reference Card

BIDMANAGER
Eaton's Pricing and Configuration Tool

Access Bid Manager through www.My.Eaton.com under the **quick links**. Users without an existing MyEaton account or without a BidManager ID, please refer to the following directions.

MYEATON ACCESS:

Using your web browser, navigate to www.My.Eaton.com. Click **Request Access now** under the log in area. Fill out the information using your business information and Eaton Vista number. When prompted to select the applications you need, select **BidManager***.

BIDMANAGER ACCESS:

Using your web browser, navigate to www.My.Eaton.com. Log in using your user-name and password. Click **Welcome "YOUR NAME"** on the top of the webpage. Select **My Current Access**, then select **Update or Request New Access**, and select **BidManager***.

*An IT ticket will be created when new access is requested. Please allow 24-48 hours for completion.

Quick Tips

- Press F11 on your keyboard to toggle your viewable screen area.
- Type at least three letters in any search field in Bid Manager.
- Share notes with people outside your company by unchecking the Internal Notes box when adding a new note.
- Click on My Account to set default e-mail notifications (Notifications top tab), and default Sharing options (Job Defaults top tab).
- Click the yellow star in the Create Items screen to add a product to your favorites menu.

Help/Performance Support

In the top right corner click on the blue question mark to access videos, tip sheets, step-by-step instructions, and other help materials.

Navigation Bar

On the right side of the home screen, click on icons to quickly move between open windows. Click on the **Home** icon at any time to return to the home screen.

Screen Setup

To customize the home screen layout, click on **Screen Setup** icon.

Job Screen: Top Tabs

Home

Alternate

Many screens have top tabs that toggle the ribbon bar buttons from one set of actions to another. The buttons are grouped together and labeled. **Pay attention to the group label.**
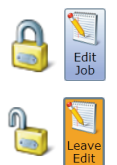
Edit Items: Top Tabs

Edit Items

Pricing

View

Use the Edit Items top tab to **Copy Selected Items** to Excel or **Assign Item Numbers**. Use Pricing for DRFQ/RFQ functions. Use the View tab to set up three custom column views.

Edit Mode

In the left side Overview tab, the lock shows if the job is open for editing. Underneath the lock button, the sharing access level displays. On the Home top tab, toggle the **Edit Job/Leave Edit** button to enter and leave edit mode.

- **Job Owner:** Full editing rights
- **Restricted Access:** Create new alternates, but cannot change existing alternates or job properties
- **Read Only:** Read access only

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Create a Custom View (Folder)

1. In the home screen of Bid Manager, click on the **Search for Jobs** view.
2. In the left side panel, customize your search options and then click **Save**.
3. Name the new icon (folder). It will appear in your home screen in the views section.

Find Existing Jobs (Views)

1. Click any View icon from the home screen.
2. Select Filter parameters and/or type at least three characters of a job name, negotiation #, customer name in the search field.
3. Click **Filter**.

Creating Items

1. In the left side Overview tab of the job, select an alternate.
2. In the Product grouping on the Home top tab, click on the **Create** button (or)
3. In the home screen, click on the **Create Item** button. After the item is configured, add it to a job by clicking **Save**.

Changes to Edit Items Terminology

Total Market List Price multiplied by the relevant **Plant**, **Sales**, or **Customer Multiplier** equals the **Plant/Sales/Customer Total Net Price**. Use the **Quote Multiplier** to mark up the final **Quote Total Net Price** (replaces Ext Quote.)

In the Edit Items screen, **BOLD** numbers can be changed, BLUE numbers are multipliers, and RED numbers indicate a multiplier is below the approved minimum.
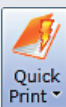
RFQ/DRFQ

1. In the left side Overview tab of the job, click on the alternate that needs pricing approval.
2. In the Home top tab of the job screen, click on **Edit Items**.
3. Use the Customer/Sales multiplier to adjust your price.
4. In the Pricing top tab, click on the **Request Authorization** button.
5. Fill out all required fields and include notes as to why special pricing is needed.
6. After approval, use the **Price Request Management** view in the home screen to search jobs with the status "Response Waiting."
7. To accept approved pricing, open the job and navigate to the Pricing top tab of the Edit Items screen. Click on **Review Response**. Click **Accept**.

Order Entry

1. In the left side Overview tab of the job, select the alternate to be ordered.
2. In the Home top tab, click on the **Enter Order** button.
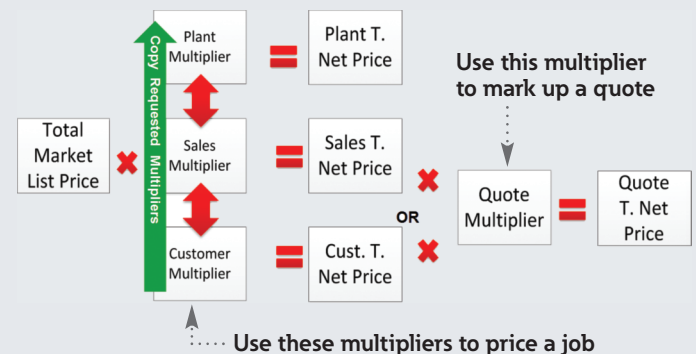3. Follow the steps in the numbered tabs.

Printing

TO QUICK PRINT:
1. In the left side Overview tab, select the alternate to print.
2. In the Home top tab, click **Quick Print**.
3. Enter your email and select the type of document to print.
4. Click the orange document icon and check your email.

PREPARE A DOCUMENT PACKAGE:
1. In the left side Overview tab, select the alternate to print.
2. In the Home top tab, click **Document Services**.
3. Select your choices in tabs 1 through 4. Use the Table of Contents and Additional Information tabs on the right as needed. Required information will be highlighted in RED.
4. When finished, click **Submit** on Tab 4 to deliver your document package to the specified email address.

Edit Items Math

Use this multiplier to mark up a quote

Use these multipliers to price a job

Attach Documents and Notes to a Job

In the job screen, click the left-side **Documents** tab file to a job. Individual documents can be 50MB max total document storage per job. Click the left side N communicate with co-workers sharing the job.

Sharing (Internal and External)

Share a job with additional Bid Manager users internal to your company by adding them in the left side **Sharing** tab within the job. Share an alternate with a Bid Manager user external to your company using the **External Sharing** button on the Alternate top tab.

Change the default sharing settings using the Job Defaults top tab under the **My Account** icon in the home screen.