

# **BM200: Bid Manager Distributor User's Guide**

September 2016



#### **Using This Manual**

The following document standards are applied to facilitate ease of use.

- Each job aid (task) is identified with a title on the first page. A short overview appears after the title to describe the task and its appropriate use.
- Each step involves an action verb, including but not limited to:
  - Click: Left-click the mouse on the designated button, line, or field.
  - Select: Choose an item from a menu or listing.
  - **Type**: Type an entry using your keyboard.
  - **Press**: Press a key on your keyboard.
  - **Enter**: Use the designated field to either Select or Type an entry, as appropriate to your needs or data.
- Bold text is used to identify key actions, buttons, fields, and entries.
- Italics text is used to denote a note or reference to another job aid.
- References to toolbar icons are given by the icon name.



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# **Access Bid Manager**

Bid Manager is a web-based application, programmed in Microsoft Silverlight. Bid Manager can be accessed from any internet browser that runs the Microsoft Silverlight plug-in.

The Microsoft Silverlight plug-in is required to access Bid Manager. Depending on the computer settings, a prompt to first install Microsoft Silverlight may appear.

#### **Procedures in this Job Aid:**

- Browser Compatibility
- <u>Access Bid Manager</u>
  - o <u>Distributors</u>
  - o Eaton Employees
- Install Microsoft Silverlight

#### **Browser Compatibility**

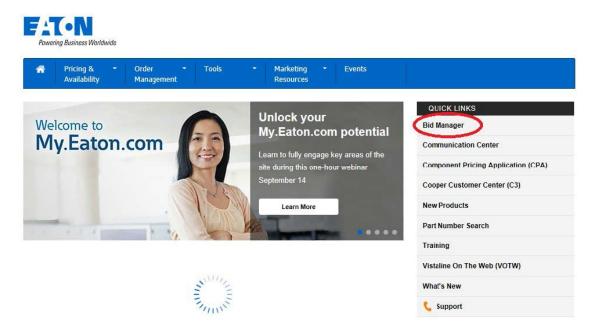
Browser/Device	Version
Internet Explorer 11	Version 11 and up. It is recommended to use IE11 and up when using Bid Manager.
Google Chrome	Version 21 and up, however various issues have been documented while using Bid Manager in Chrome.
Mozilla Firefox	Version 14 and up, no issues have been documented using this version.
Opera	Version 12 and up, however this browser has not received extensive testing.
lphone/lpad	Bid Manager requires the Microsoft Silverlight plug-in which is not supported by the Apple mobile operating system at this time.
Other Phones and Tablets	Bid Manager is currently undergoing testing on a variety of devices. In general, if the device supports Silverlight, it will support Bid Manager.



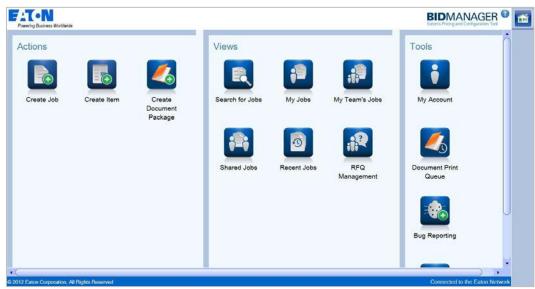
#### Step 1: Access Bid Manager

#### Distributors

- 1. Open Internet Explorer.
- 2. Browse to <u>My.Eaton.com</u> and sign into MyEaton using your credentials.
- 3. Once you have logged into MyEaton, click the **Bid Manager** link under Quick Links.



4. Bid Manager will automatically load.





#### Step 2: Install Microsoft Silverlight

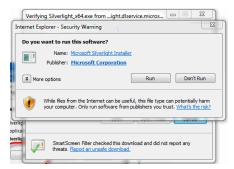
 When Microsoft Silverlight has not been installed a web page prompting the install of Silverlight will appear. Click the Click now to install button to begin the install process.



2. The File Download Security Warning will ask if the file is to be run or saved. Click Run.

File Down	load - Security Warning
<b>Do уо</b> ц	want to run or save this file?
	Name: Silverlight_x64.exe
	Type: Application, 12.4MB
	From: silverlight.dlservice.microsoft.com
	Run Save Cancel
۲	While files from the Internet can be useful, this file type can potentially harm your computer. If you do not trust the source, do not run or save this software. <u>What's the risk?</u>

**3.** When the Silverlight installer has finished downloading, an Internet Explorer Security Warning will prompt you to run the install. Click **Run.** 



**4.** A Windows Vista or Windows 7 User Account Control prompt displays giving the option to install. Click **Yes**.





5. The Silverlight Install will launch, Click the Install now button.



6. When the install has finished and is successful click the **Close** button.



- 7. Close Internet Explorer.
- 8. Re-open Internet Explorer.
- 9. Re-sign in to My.Eaton.com.
- **10.** Follow prompts from Step 1 to sign in.





**11.** When Bid Manager finished loading the Bid Manager Home Page displays.

#### **Related Topics:**

Navigate and Customize Bid Manager •



# **Customize Bid Manager Account Settings**

Accounts in Bid Manager can be personalized with preferences available in My Account settings. Personal information, notifications, and job sharing defaults can be customized in Bid Manager.

1. From the home screen, click **My Account**.



2. When the My Account page displays, verify that the Information is correct on the My Information tab.

		My Account 🛿 @
My Information Notification	Job Defaults	
JERRY WARREN		Â
Bid Man ID	T814	
Office Location	This will come from portal	
Address	Address comes from JOE Portal, JOE 55555	
E-mail	JerryWarren@Eaton.com	
Office Phone		
Office Fax		
Cell Phone		
Region Settings		
Currency	US Dollars	
Language	English (United States)	
Default Geography Filter	(unspecified)	$\cup$
		Save Cancel

Note: When the information is incorrect, contact the Helpdesk.



**3.** Under the notifications tab, setup notifications of Price Requests, Orders, and Job Ownership.

ering Business Worldwide	My Accou
Information Notifications Job Defaults	
Use this page to set additional notification	options regarding Bid Manager activity affecting your loca
These settings do not affect any activity w cases you will still be notified regardless of	here you are a participant such as Price Requests, Order of the settings here.
Price Requests	
I would like to be notified of Price Reque	sts to these locations by email:
Search	
Select All	
(old) LA RESIDENTIAL (old) LA R	ESIDENTIAL (1453-3-R)
ALTERNATE ENERGY ALTERNA	TE ENERGY (1453-3-A)
BAKERSFIELD BAKERSFIELD (1-	453-3-B)
ENGINEERING SERVICES ENGI	NEERING SERVICES (1453-3-E)
EOEM EOEM (1453-3-Q)	
Orders	
I would like to be notified of customer's o	rders by email for the following locations:
Search	
Select All	
(old) LA RESIDENTIAL (old) LA RI	ESIDENTIAL (1453-3-R)
ALTERNATE ENERGY ALTERNA	TE ENERGY (1453-3-A)
BAKERSFIELD BAKERSFIELD (1	453-3-B)
ENGINEERING SERVICES ENGI	NEERING SERVICES (1453-3-E)
EOEM EOEM (1453-3-Q)	
Job Ownership	
I would like to be notified when I am set	as the owner of a Job by:
E-mail	



**4.** Under the Job Defaults tab, select the defaults for sharing jobs. (Refer to the *Share a Job* job aid for more information)

EAT • N	Му Ассон
Powering Business Worldwide	
My Information Notificati	ons Job Defaults
Set the default prope	arties you would like applied to new jobs you create.
Sharing Defaults	
	job with other users in your organization. elow to chose which users you would like to share the job with.
Sharing Detail	ls
No access	The job is hidden from the group or individual until another process such as Price Requests forces the job to be visible.
Read only	The job is visible but nothing can be changed.
Alternate Restric	ted The job is Read Only except new Alternates can be added. Edits are restricted to the newly created Alternate only.
Full access	All aspects of the job can be edited.
	sers in my sales District: │ Read only ● Alternate Restricted │ Full access
	ers in my Team (cannot be more restrictive than the District Access): Read only Alternate Restricted • Full access

5. Click **Save** to save any changes made, and to exit account setup. Click **Cancel** to discard any changes made, and exit account setup.

T-N		My Account
vering Business Worldwide		
Information Notificat	Job Defaults	
Set the default prop	rties you would like applied to new jobs you create.	
Sharing Defaults		
	job with other users in your organization.	
Ū	elow to chose which users you would like to share the job with.	
Sharing Deta No access		process such as Price Requests forces the job to be visible.
Read only	The job is visible but nothing can be changed.	process such as the requests forces the job to be visible.
	ted The job is Read Only except new Alternates can be added.	. Edits are restricted to the newly created Alternate only.
Full access	All aspects of the job can be edited.	
Access level for u	ers in my sales District:	
No access		
Access level for u	ers in my Team (cannot be more restrictive than the District Ac	ccess).
	Read only Alternate Restricted • Full access	).
<u> </u>		



# Navigate Bid Manager and Customize the Homepage

Bid Manager is a web based product configuration application. Bid Manager provides users the ability to customize their homepage.

#### **Procedures in this Job Aid:**

- Navigate Bid Manager
- Customize Bid Manager Homepage
- Exit Bid Manager

#### Navigate Bid Manager

**1.** After logging into Bid Manager the homepage will load. The diagram below outlines the different sections of the Bid Manager Homepage.

*Note:* Navigate within the program only. *DO NOT* use the browser's back, forward, or home, or refresh icons (F5). Doing so will end the Bid Manager session.

FATON Powering Business Worldwide	D BIDMANAGER® 🖆 🔶 E
Actions Create Job Create Item Create Item Create Item Create Item Create Document Package	Views My Jobs Search for Jobs Shared Jobs RFQ Management
Å	
© 2012 Eaton Corporation, All Rights Reserved	Connected to the Eaton Network
	B

Group	Description
A	Action icons used to create jobs, items, and document packages
В	Views icons are used to find and manage jobs.
С	Tools icons are for account and Bid Manager customization
D	Question mark icon launches Bid Manager Performance Support Site
E	The right navigation pane area is used to switch between jobs, items, and other Bid Manager pages



**2.** Navigate within jobs and alternates. The diagram below outlines the different components of navigating within a job in Bid Manager.

FATON Powering Business	Loss and the second sec	D <u> </u>	ABC Electric	1
Home Alternate			Â	1
Edit Items Pricing	Save Reload Duplicate Assign Delete Job	Documentation	←A	□E
	<b>R</b>	78140514X2K1 Reporting Alternate: 0000 Job Owner: T814 (JERRY WARREN)	Editing 🍡	
Customers	0000 - Base Created: 5/14/2012 2:46 PM	Alternate Owner: T814 Updated: 5/21/2012 1:40 PM	USD	
Market Data Sharing Documents	0001 - NewAlternate Created: 5/14/2012 10:51 PM	Alternate Owner:T814 Updated: 5/21/2012 1:40 PM	USD	
© 2012 Eaton Corpo	pration, All Rights Reserved		Connected to the Eaton Network	

Group	Description
A	Ribbon bar
В	Left Job Tabs
С	Close icon – closes the job
D	Question mark icon launches Bid Manager Performance Support Site
E	The right navigation pane is used to switch between jobs, items, and other Bid
	Manager pages

3. The Ribbon bar is collapsible, and can be hidden until it is needed.



**Note:** Press F11 to go full screen with Bid Manager, or to return to the browser window



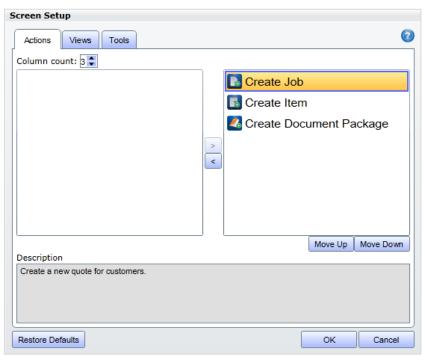
#### Customize Bid Manager Homepage

The Screen Setup tool allows users to customize the look and feel to Bid Manager. Screen setup also allows users to determine what icons will be available to them on the homepage.

1. Under the Tools panel, click the **Screen Setup** icon.



2. The Screen Setup page will appear, and the **Actions** tab opens by default. Select options on each tab to customize the homepage. The 3 sections available for setup are:



Tab	Description
Actions	Available icons are Create Document Package, Create Item, and Create job.
Views	Available icons are My Jobs, My Team's Jobs, Recent Jobs, RFQ Management, Search for Jobs, and Shared Jobs.
Tools	Available icons are My Account, Bug Reporting, View Application Log, Document Print Queue



3. Click the Up or Down arrows to add or remove columns.

Screen Setup		
Actions Views Tools		0
Column count: 3		
	💽 Create Job	
	Create Item	
	Create Document Page 2018	ackage
>		
<		
Description	Move Up	Move Down
Create a new quote for customers.		
Restore Defaults	OK	Cancel

- 4. Add an icon or Remove icons.
  - Add an icon by selecting it in the box on the left, and click the directional arrow to add it to the box on the right.
  - Remove an icon by selecting it in the box on the right, and click the directional arrow to add it to the box on the left.

Screen Setup		
Actions Views Tools		0
Column count: 3		
Create Jo	b	
Screate Ite	m	
Create Do	ocument Pa	ckage
Description	Move Up	Move Down
Create a new quote for customers.		
Restore Defaults	ок	Cancel



5. Select an icon in the box on the right, and click the Move up or Move Down icon to change the position of the icon on the homepage.

Screen Setup		
Actions Views Tools		0
Column count: 3 📚		
	🖪 Create Job	
	Create Item	
	🛃 Create Document Pa	ckage
>		
<		
Description	Move Up	Move Down
Create a new quote for customers.		
Restore Defaults	ок	Cancel
	- OK	

6. To reset all icons click **Restore Defaults** and click **OK**.

Screen Setup				
Actions Views Tools				0
Column count: 3 🖨				
		🗟 Create Job		
	Ī	🐻 Create Item	1	
		🔏 Create Doc	ument Pa	ckage
	>			
	<			
			Move Up	Move Down
Description				
Create a new quote for customers.				
Restore Defaults			OK	Cancel



### **Create a Job**

Jobs contain customer, marketing, documentation, product and pricing information for orders. Jobs also have one or more bills of material in Bid Manager. Although you can configure a product/item in Bid Manager without first creating a job, the item/product must be associated with a job to be saved.

#### Procedures in this Job Aid:

- Properties Section
- <u>Customers Section</u>
- Market Data Section
- Notes Section

#### **Properties Section**

1. In the Actions section of Bid Manager Home page, click the **Create Job** button.



- **2.** The Create Job page appears; the **Properties** section is expanded by default. Complete the form by entering the:
  - **Job Name**: Include the **end user's project name** as part of the Job Name. This will assist others when they are searching for the job.
  - Job Status: Denotes the progress of the job through the order cycle. Bid Manager will automatically update this field when RFQ (Bid) or Order Entry(Obtained) are requested, requiring additional information.

Job Status	Definition
New	Default for new jobs.
Budget	Quick job creation, with few required fields.
Bid	All information needed to complete a Bid Package for a customer.
Awarded	Customer has committed to buying from Eaton.
Obtained	, , , , , , , , , , , , , , , , , , ,
Obtained Lost/Abandoned	Eaton has obtained a formal purchase order.



• **Job Type:** Describes the pricing levels, approval processes and products contained in the job. This field will automatically change as job criteria change.

Job Type	Definition
Small Projects	Default for new jobs in NA. Pricing approval is managed centrally. Maximum alternate price of \$100,000. Contains at least 1 'Panelboards' or 'Switchboards' item. No products on the "disallowed list".
Conventional	Mid-range jobs that do not qualify for SPP or are not large enough for CHAMPS. Pricing approval is managed directly by the product line/source site, so may require multiple approvals for items in different product lines.
CHAMPS	Domestic USA multiple product line project packages, \$100K and up, Pricing approval is managed for the job in its entirety, up to order entry by the central Champs / Champs International teams. All change pricing post order entry is managed directly by the product lines.
EQIP:	This job type is for all North American and LAM pricing for IEC projects/assemblies with ship to destinations outside of North America.

Note: Depending on user profile, not all options will be available.

- **Bid & Purchase Date**: Bid is the date the job will be submitted to the customer, and the purchase date is the expected date of purchase.
- **Customer Request Number**: An optional number provided by the customer to track the project.
- Job Site Location: Provides information on the geographic location of the job.

**Note:** Required information is denoted by red asterisks, and the arrows are used to expand, and minimize each section.

$\overline{\mathbf{b}}$	Properties*
0	Customers*
$\overline{\mathbf{b}}$	Market Data*
$\overline{\mathbf{b}}$	Notes



#### **Customers Section**

- 1. Click the **Customers** arrow to expand the customer section.
  - To add a recently used customer, select the customer and use the green arrows to add or subtract the **Recently Used** customer information into the **Customer/Distributor** section. Multiple Customers can be added to a job.
  - If searching for a customer, click the Search tab, type in at least 3 letters of the customer name, or Vista ID and click the Search button. Jobs contain customer information and one or more bills of material in Bid Manager. You can also use the red Rext to the customer name to remove it.
  - To add a customer that is not in the database, search for and add the customer "**Miscellaneous**". Edit the customer information during the Documentation Service process.

Powering Business Worldwide	Create Job	×	<b>1</b>
Properties*		Â	1
Customers           Recently Used         Search	Click ← or X button to remove customer from customer list		
Search for Customer, Vista Number, or Postal Code	Selected Customer/Distributor		Ŀò
tur 🛷 Select a Geography Filter (optional)	21ST CENTURY ELECTRIC 158117 End Customer		
Geography Filter: (unspecified)			
2099 search results Click on the customer then click = to add to customer list			
20TH CENTURY FOX 260334 End Customer		U	
21ST CENTURY ELECTRIC 158117 End Customer	<b>4</b>		
21ST CENTURY GRAIN 237679 End Customer			
	Save		

**Note:** When the customer should be added to the Vista database, navigate to the Bid Manager Performance Support site, and click the Add a Customer icon.

#### Market Data Section

- 1. Click the **Market Data** arrow, and the **Market Data** section expands. Enter the following:
  - Bid Type Identifies the type of bid on the Bill of Material
  - End Use Segment Identifies the type of market the job is being quoted in.



#### **Notes Section**

**1.** To add a note, click the **Add** button.

Custome	rs						
Market D	ata						
Notes	)						
Use the No	otes section to a				out the job o	r alternate.	
	rovided to view	notes about a s	specific alterr	ate.			
	> ~	notes about a : NI Notes	specific alterr	ate.			
A filter is p			specific alterr	ate.			
A filter is p			specific alterr	late.			

- 2. The Add pop-up appears. Click the drop down menu to add a General Note to the job, or select a specific Alternate.
- 3. Check the Internal Note box if you want the note to only share with coworkers who have access to the job within your organization. (External sharing will exclude those notes without the check mark.)

Add	23
You can add a general note or select a specific Alternate.	General Note 🔹
Select 'Internal Note' to keep the note private to your company.	Internal Note
Enter note	
	Add Cancel

*Note:* The note appears in a table below the Add button.

4. When the job information has been completed, click **Save**.



5. After the job is saved, Bid Manager loads the job in Edit Mode.

Powering Busine	ss Worldwide						G	reen	Build	ling :	LA18	3022	?1 <b>F301</b>		1
Home Alterna	te													•	
Edit Items	t	e Reload		Assign Job	Delete Job	Quick Print *	Service				×				
Pricing Edit M	ode		Job			D	ocumentati	on	Order	Pro	oduct				
Overview Items		en B		ing	Neg #: GO #:	LA180221	F301 Repo Job (	rting Alten )wner: LA				E	Editing		
Properties	000			Alternate	Creator.	IASON					USD	-			
Customers		) - Bas	e			1/2013 6:	17 PM			Sales To	tal Net P		01.73		
Market Data														-	
Notes															
Documents															
Sharing															

6. Notes can be viewed at any time in the job screen in the **Notes** left side tab.

	ing Business V	Vorldwide			Gree	n Build	ing :	LA18	80221F301		1
Home Edit Items	Alternate	Save	Reload D	uplicate Assign Delete		Document Service	PDAS	==	□ N E @ ★ }- × ⊕ ₫ ♥	^	
Over	ems	Jse the Not		Job to add and view any perti ew notes about a specific All Notes	nent informa	tion about the		Order	Product		
Custo	omers	JASON This is	the base al	All Notes t General Note Order Entry Notes				🔒 3/	/8/2013 5:50 AM 🛐	×	
No	et Data	JASON I will be		0000 - Base on Mar 13th - 16th.				3	/8/2013 5:50 AM [	X	
	aring	•								•	

#### **Related Topics:**

- Edit a Job
- Create an Alternate
- Create a Duplicate
- Share a Job
- Create an Item



### Edit a Job

All aspects of a Job can be edited in Bid Manager. When a job is created and saved, the Job Edit screen appears. The tabs on the left contain all the information provided when the job was created. They can be accessed anytime to edit the job information.

*Note:* Edit mode is enabled by default when a job is selected. To leave edit mode click on **Leave Edit** in the Home top tab.

#### Procedures in this Job Aid:

- Overview
- Items
- Properties
- <u>Customers</u>
- Market Data
- <u>Sharing</u>
- <u>Documents</u>
- Notes

#### **Overview**

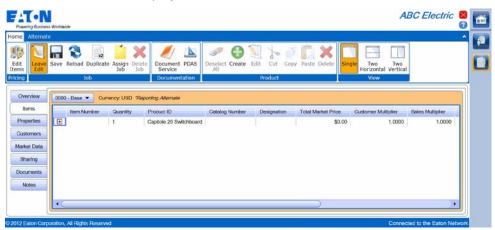
The Overview left side tab lists all Bills of Material/alternates within the job.

e Alternate	Reload Duplicate Assign Delete Job	Documentation	Single Two Two Horizontal Vertical							
t Edit	ve Reload Duplicate Assign Delete Job Job	Document PDAS Deselect Create Edit Cut Copy Paste Delete All	Single Two Two							
19	001		32000							
		Documentation Product	View							
nems										
dsiomers	0000 - Base reated: 5/14/2012 2:46 PM	Alternate Owner:T814 Updated: 5/21/2012 1:40 PM	USD							
	0001 - NewAlternate	Alternate Owner:T814	USD							
	reated: 5/14/2012 10:51 PM	Updated: 5/21/2012 1:40 PM								
Notes										

1. Use the **Alternate** top tab to create and edit alternates. When an alternate is created it may be renamed, and all information about the alternate can be edited. Refer to the **Create an Alternate** job aid.



2. Click on a grey bar to open a particular alternate. When an alternate is selected the Items left side tab will display.



#### Items

New items (products) can be added to a Bill of Material in the **Items** left side tab. On the **Home** top tab, click on the **Create** button in the products grouping of the ribbon bar to begin configuring an item.

											A	BC Electric	
a Alternate						_						16	^
Edit	ave Reload	Jot	gn Delete Job	Document PDA Service	Al	Create	Edit Cut	Copy	Paste Delete	Singl	Horizontal Vertica		I
ig	- a	ob		Documentation	1		Product				View		
weiview	(												-1
	0000 - Base	Currency: I	USD "Repo	rting Alternate									_
Items	Item N	umber Qua	ntity F	Product ID	Catalo	g Number	Designatio	on	Total Market Prie	0	Customer Multiplier	Sales Multiplier	
roperties	Ð	1		Capitole 20 Switchbo	bard				\$	0.00	1.0000	1.0000	
astomers	1												
bohromo antes													
rket Data													
wket Data Sharing													
ustomens arket Data Sharing ocuments													
wket Data Sharing cuments													
wket Data Sharing cuments													
arket Data Sharing	•												

Note: For more information refer to the Create an Item job aid.



#### **Properties**

The Properties left side tab lists the Job Name, Status, Type and other information that was entered when the job was created. This can be edited at any time prior to DRFQ/RFQ or Order Entry.

	Workske	ABC Electric
e Alternate		
Dverview Teams Troperties Customers arket Data Sharing tocuments Notes	Job Name <sup>®</sup> (ABC Electric T814051402K1 Job Status <sup>®</sup> New  Job Status <sup>®</sup> New  Job Drawe T814051402K1 OO Number Job Drawe T814051402K1 OO Number Job Drawe T814051402K1 OC Number Job Drawe S142012 2.45 PM Code Date S142012 2.45 PM	Ĵ
	Lest 10 location         Lest 10 locations           Country*         UNITED STATES         City         Pastal Code         27604           xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	×

#### Customers

Click **Customers** in the left side tabs to add or change customers associated with the job.

Poweri	Ing Business Wo	rldwide			John Biggins : t1241026X2K1 🛿	<b></b>
Home	Alternate				^	1
Edit Items Pricing	Leave Edit Edit Mode	Save Reload Duplicate Assign Delete Job	Quick Document PDAS Print - Service Documentation	=== == = Under	Deselect All S Edit Paste     Select All S Cut S Delete     Create Ocp S Global Changes     Product	
Ite Prop Custo Marke No Docu	erties comers et Data ites ments wring	Recently Used Search	stomer list		ick a r button to remove customer from customer list lected Customer/Distributor	
© 2013 Ea	aton Corporat	ion, All Rights Reserved			Logged in as JOHN BIGGINS (T124)	

**Note:** Multiple customers can be added to a job. This information will be available for RFQs and Documentation.



#### Market Data

Market data can be updated at any time. Click **Market Data** in the left side tabs to review or edit market Data.

Overview	Please provi	Please provide information about the type of job						
Items		price authorization and order entry.						
Properties	Sales Vertical	•						
Customers	End Use Segment	<b>•</b>						
Market Data	, End Use Sub Segment							
Notes	Application							
Documents								
Sharing	Sub Application	•						
Synchronization Activity	Bid Type	•						
		LEED Certification 📃 Target Project						
	Campaign	Solar Project Wind Project						
		GSA						
	Confidence	•						

#### Sharing

1. Click **Sharing** in the left side tabs.

**Note:** Changing Sharing options at the job level will override the default sharing options in the account settings for that job. **See Customize Bid Manager Account Settings** for more information about default sharing options.

2. Edit the sharing options. Refer to **Share a Job** for more information about sharing jobs.

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Home Alternat	e ·	- 🗊
Edit Items Pricing	Save Reload Duplicate Assign Delete Job     Image: Constraint of the service All     Image: Conservice All     Image: Conservice All     Image:	
Overview	You can share the job with other users in your organization. Use the settings below to chose which users you would like to share the job with. Sharing Details	
Properties Customers	Access level for users in my sales District:	
Market Data	Access level for users in my Team (cannot be more restrictive than the District Access):	
Sharing Documents	Specific user share permissions: International Internationa International International Internationa	
Notes		
© 2012 Eaton Corp	connected to the Eaton Netwo	ク rk

#### **Documents**

Job specifications, drawings, and other documentation can be attached and shared with internal job sharing partners. The documents will remain with the job throughout its life. The max size limit for each document/file is 50MB and 100MB per job.

1. Click **Documents** in the left side tabs.



2. Click on the Upload New button.

Powering Busines	and the second second						AL	BC Electric 🗧 🚾
Home Alternat	e							^ <b>[</b> ]
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Pricing	Job		Documentation		Product		View	
Overview	Attach Documents	Upload New						
Items								
Properties	No documents attached	to the job.						
Customers								
Market Data								
Sharing								
Documents								
Notes								
© 2012 Eaton Corp	oration, All Rights Reserved						Connect	ed to the Eaton Network

3. Browse to a file to upload, and click **Open**.





**4.** The file will be uploaded to the job.

	a Worldwide				ABC Electric	
ome Alternal Edit toms ricing	o Save Relaad Duplicate Assign Dek Job	te Document PDAS	Deselect Create Edit Cut Copy All	Paste Delete	Two tal Vertical	
Overview Items Proporties Costomers Aarkot Data Sharing Documents Notes	Attach Documents		UPLOAD: Properties.gif Initializing Cancel			
	viration. All Rights Reserved				Connected to the Faton Netwo	

5. Use the buttons to **Replace**, **Download**, **Edit**, or **Delete** the file.

								ABC Elec	ctric 🙎 🕻
ne Alternat	e							42	
dit ms		Assign Delete Job	Document PDAS Service	Deselect Create		Paste Delete	Horizontal	Two Vertical	C
ting	dot		Documentation	2	Product		View		
Overview	Attach Documents	Upload New				200			
Items		(		(		2			
Properties	File: At EMEA Roll	lout.docx							
	Description: edit								
Customers									
Aarket Data									
Sharing									
Documents									
Notes									
3.									
12 Eaton Corp	oration, All Rights Reserved							Connected to the Ea	ton Network

Note: Anyone with Full Access can modify the job.



#### Notes

Add a new note or edit an existing note

1. To add a note select the Notes left side tab.

Powering Business Worldwide											
Home Alterna	te										
Edit Items	Save Reload Dup	x2 licate Assign Job	Delete Job	Document Service	DAS	Deselect All	G Create	Edit	Cut	Copy	P
Pricing	Job			Document	ation			Pr	oduct		
Overview Items Properties Customers Market Data Sharing Documents Notes	Use the Notes s A filter is provide Add No Notes	Filter: All Not All Not Genera 0000 -	about a s tes es al Note	specific altern		n about the	job or alt	ernate.			

- 2. Click Add.
- **3.** The **Add** pop-up appears. Click the drop down menu to add a **General** Note to the job, or select a specific **Alternate**.
- 4. Check the **Internal Note** box if you want the note to only be shared with coworkers who have access to the job within your organization. (External sharing will exclude those notes without the check mark.)

Add	23
You can add a general note or select a specific Alternate.	General Note 💌
Select 'Internal Note' to keep the note private to your company.	Internal Note
Enter note	
	Add Cancel

Note: The note appears in a table below the Add button.

5. Click Add to save the note.



### **Create an Alternate Bill of Material**

Within a Job, create an alternate bill of material to compare or quote different material requests and configurations for the same job. These are called "alternates" and they are listed in the **Overview** section of the left side tabs.

- 1. From the Bid Manager Home page, open an existing job or create a new job.
- 2. From the job screen, click the Alternate top tab.

Powering Business	Vorldwide		Joh	n Biggins : t1241026X2K1	× 2	<b></b>
Home Alternate					۵	
	i b i i 🕻 🗙	<b>1</b>				
New Duplicate	Rename Cut Copy Paste Delete	Validate External Alternate Sharing	Single Two Two Horizontal Vertical			
Add	Edit Alternate	Test Sharing	View			
Overview					٦	
	John Biggins Soft Go #: t	241026X2K1 Reporting A Job Owner:	Iternate: 0000 T124 (JOHN BIGGINS)	Editing 造	2	
Ci	reated 10/26/2012 8:42 AM					
Properties	0000 - Base Atte	mate Creator JOHN BIGG	INS	USD	וה	
Customers		adated: 10/26/2012 8:43 A	м			
Market Data					11	
Notes						

3. In the Alternate top tab, click New or Duplicate on the ribbon bar.

Powering Business	Worldwide				John L	Biggins : t12	41026X2	(1 🛛 Ø	
Home Alternate								•	
									H
New Duplicate	Rename Cut C	opy Paste Delete	Validate Alternate	External Sharing	Single Two Two Horizontal Vertical				
Add	Edit Al	ternate	Test	Sharing	View				
Overview	0000 - Base 🔻 C	urrency: USD *Repo	ting Alternate						
Items	Status	Item Number	Quantity	Product Code	Product ID	Catalog Number	Designation	Tota	
Properties		001	1	AO10	GEN PURPOSE SOLENOID	10370H357			
Customers		002	3	4691	Enclosed Breakers	SNGHC1015			
Market Data									

4. Name the alternate and click OK.

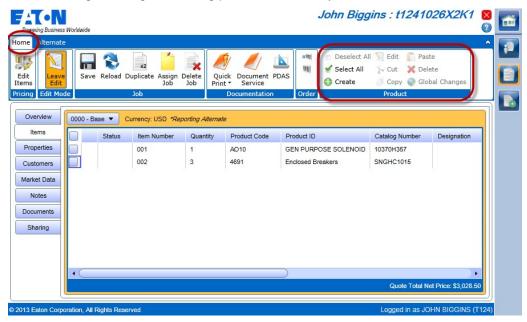
Alternate Name	23
New Alternate Name	New Alternate
87 characters remaining,	100 characters maximum
Alternate name cannot be	empty.
ОК	Cancel



5. The new alternate appears in the Overview tab.

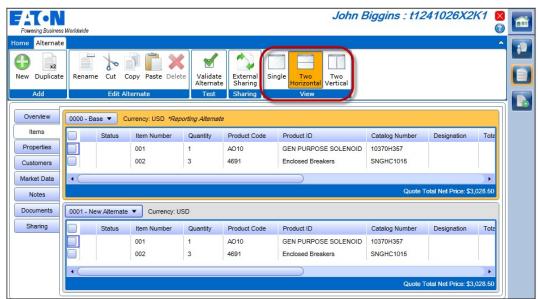
Powering Business V	Vorldwide	Test-QA010515X2	2K1 🛛 🔂
Home Alternate New Duplicate Add Overview	Cut Copy Paste Delete Rename	Document PDAS Service Documentation	eporting Al
Items	0000 - Base	QA01 17/2012 10:23 AM	EUR
Sharing Documents Notes	0002 - New Alternate	QA01 Updated:	EUR
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- 6. Click on the alternate grey bar to select it. The alternate will open in the **Items** left side tab. For more information, refer to the **Create an Item** job aid.
- 7. Click on the **Home** top tab to find the **Product** grouping in the ribbon bar. Use these buttons to begin adding and editing products/items on your alternate Bill of Material.





8. Multiple alternates can be viewed at the same time by clicking on the view options in the **Alternate** ribbon bar while in the **Items** left side tab.



#### **Related Topics:**

- Create an Item
- Manage and Find Jobs
- Create a Job



### Create or Copy an Item

Items (products) are added to a job to create a bill of material. Items can be created from within an existing job or individually from the bid manager home screen. In order to save an item, it must be placed on a job bill of material (alternate). Throughout Bid Manager "Item", "Products", and "Takeoffs" are interchangeable.

#### Procedures in this Job Aid:

- Create an Item from an Existing Job
- <u>Creating an Item from the Home Page</u>
- <u>Copy an Item</u>

#### Create an Item from an Existing Job

- 1. Login to Bid Manager.
- 2. Open an existing job.
- 3. Click **Items** in the left side tabs.
- 4. Click the **Create** button in the **Product** grouping.

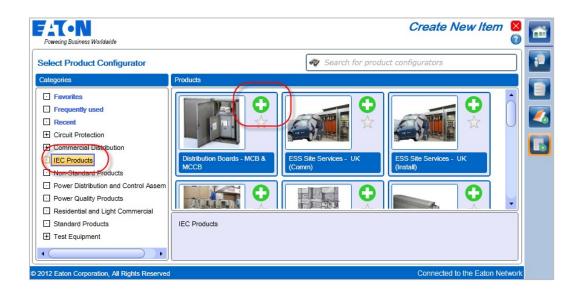
**Note**: Double-click on an existing item in the alternate to open it for editing, or highlight the item and click Edit in Product icon group.

Power	ing Business	World	lwide						M	agnu	ım S	witchgear	: T814	0201X	′3K1 🛛
Home	Alternate							_							۵
Edit Items Pricing	Leave Edit		Save	Reload	x2 Duplicate Job	Assign Job	Delete Job	Quic			= 11 11 12 12 12 12 12 12 12 12	Deselect All     Select All     Create	I 🔪 Edit	100	e I Changes
	rview	00	00 - Ba	se 🔻	Currency: l	JSD *Re	porting A	lternate							
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Prop	erties			2			1		6417M	Au	tomatic 1	ransfer Switches	ATVIMGA3	3200ESU	
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		•		_	_		_						Quote Total	Net Price: \$	33 354 00
	U												quote rotar	norr nee. p	00,001.00

- 5. The Create New Item page loads. There are several notable features on this page.
  - **a.** You can add or remove items to a **Favorites** page by selecting/deselecting the yellow star underneath the **Green** plus sign.
  - **b.** Access **Frequently Used** and **Recent** items from respective menus at the top of the categories list.



- 6. A specific item can be found in two ways:
  - Select an item Category.
  - Use the search bar in the top right corner. Enter at least 3 letters of the item name, and press **Enter** on the keyboard.



7. Click the Green plus sign of the item to launch the takeoff.



8. The item takeoff page displays. Configure the item by making selections on each tab on the left side of the takeoff, and click **Save**.

**Note:** To save multiple items without closing and re-opening the takeoff, use save new. **"Save"** will save changes over the item previously created and saved. **"Save" New**" will save changes to an item as an additional item.

Powering Business Worldwide		Cap	itole	20 Swit	chboards	2	6
Rty : 1 Designation :	£1,121.8	2 -				•	1
Nev Save Save Import Export Validate Report Takeoff a Bug	Neg #: Alt #:	QA010515X2K1 0000	U.K.	Price List (£)	Material Upda	ate	
File		Job		Pric	æ		
System 🕑 Design						Ô	
Construction Configuratio	n Standard	IEC 61439-1	•		Internal Sep		
System Options	Delivery	Standard		•	Protection	۲ U	
Device Mods	Fuses	Excluded		•	Barrie	3	
Notes							
Layout Ultimate Short Circuit Breaking Ca	pacity (kA)	35			MCCB Operatio	4	
Print Options				_		-	
© 2012 Eaton Corporation, All Rights Reserved				Connected	to the Eaton N	etwork	

**9.** Click the **Red X** in the upper right corner to close the takeoff and return to the job, or highlight the icon on the navigation bar and click the red X in the icon to close the takeoff.

#### Create an Item from the Home Page

- 1. Login to Bid Manager.
- 2. Click the **Create Item** button.



- 3. The Create New Item page loads. Select an item **Category**, and click the green **Plus Sign** to launch the takeoff.
- 4. Configure the item by making selections on each tab on the left side of the takeoff, and click **Save**.





5. Because the item is not yet associated with an Alternate, add the item to an existing job/alternate using the resulting Save As pop up. Search for the job by typing in the job name, general order number, negotiation number, and click **Search**.

Inter some text in the field below. This text will be used to search General Order numbers, Negotiation numbers, a games, Customer numbers and the job owner's name and Bid Manager ID.	Save As	2
	Enter some text in the field below. This text will be used to see	arch General Order numbers, Negotiation numbers, Job
	ames, Customer numbers and the job owner's name and Bid	I Manager ID.
XYZ Electric	XYZ Electric	40

6. When the search results appear, click the + sign next to the job to expand the job's list of alternates. Select the base or alternate to associate the item and click **Save**.

ave As		-2
inter some text in the field below. This text will be used to se lames, Customer numbers and the job owner's name and Bi	arch General Order numbers, Negotiation numbers, J id Manager ID.	ob
07		R
- XYZ Electric		-
0000 - Base		
		_
	Save Cance	1

**10.** Click the **Red X** in the upper right corner to close the takeoff and return to the add item screen.

#### Copy an Item

- **1.** Open a job containing the item to be copied.
- 2. Click the Items left side tab.



3. Select the item to be copied and click **Copy** in the Product toolbar.

Powering Busines		wide						М	agnu	ım Sı	witchgear	: T8140201	X3K1
ome Alternat	e										0		
Edit tems		<b>Gave</b>	Reload	2 Duplicate	Assign Job	Delete Job	Quick Print		PDAS		<ul> <li>□ Deselect Al</li> <li>✓ Select All</li> <li>Oreate</li> </ul>	Cut X Dele	
ricing Edit Ma	ode			Job			D	ocumentatio	n	Order		Product	
Overview	00	00 - Ba	se 🔻	Currency: L	ISD *Re	eporting A	lternate						
Items			Status	Item N	umber	Quan	tity	Product Code	Pr	oduct ID		Catalog Number	Designa
Properties			•			1		6417M	Au	tomatic T	ransfer Switches	ATVIMGA33200ESU	J
Customers	$\checkmark$	(F)	9			1		BN81	An	npgard M	VC		

- 4. Open the alternate where the item will be copied.
- 5. Click **Paste** from the Product toolbar.

	ering Busines	_	wide				Dis	tribu	ition	Cente	er Job	) : T	814	1200	6X2K	2 🛛	
Home	Alternat															^	
Edit Items	Leave Edit	Save	Reload	x2 Duplicate	Assign D Job	elete Job	Documen Service	t PDA		Reserve ler Numb	Enter Order	Prod					
Pricing				Job			Docume	ntation		Orde	r				0		
	erview	000	0 - Base	Curr	ency: USD	*Repor	ting Alternate	9	Desele		Create	Edit	Cut	Сору	Paste	Delete	Global
	tems		S	tatus	Item Numbe	er 🛛	Quantity	Prod		All	create	Luit	Cut	copy	- usic	Peiece	Changes
Pro	perties											F	Produc	i			
	stomers																

6. The item will be copied into the alternate.

Edit Items Pricing	Edit	Reload Duplica	ate Assign Delete Job	Document Service Documer	0		J 🗾 🔰	Product		^	
Overvie Items Propert Custom Market D Notes Docume Sharir	s ties ners Data ss ents	Base V C	urrency: USD <i>'Repo</i>	Quantity 1	Product Co 3341	de	Product ID PRLC Switchbc		talog Number	Desig	
		All Rights Reser	ved				Loc	ned in a	IS JERRY WAR	DI	

### **Related Topics:**

- Create an Alternate
- Create a Duplicate Job
- Find and Manage Jobs and Views



# **Open an Existing Job**

The Views section of the homepage is dedicated to finding and managing jobs. Find an existing job by searching with the options in the Views menu. Save a customized search on the homepage.

#### **Procedures in this Job Aid:**

• Find a Job

Shared Jobs

Search for Jobs

• Save a Custom Search

### Find a Job

1. From the **Views** menu on the home screen, select one of the following options listed in the table below:



My Team's jobs and any jobs that were specifically shared with the user.

them in the Shared Jobs window.

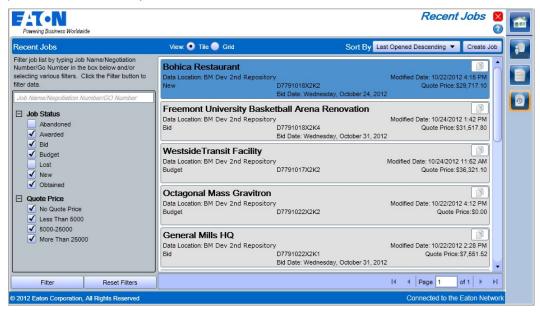
Searches the all jobs available to the user.

Note: Plant users have all access to all jobs by default.

Therefore, they only access jobs that were specifically shared with



2. The My Jobs, Recent Jobs, My Team's Jobs and Shared Jobs window display the job list in the same way.

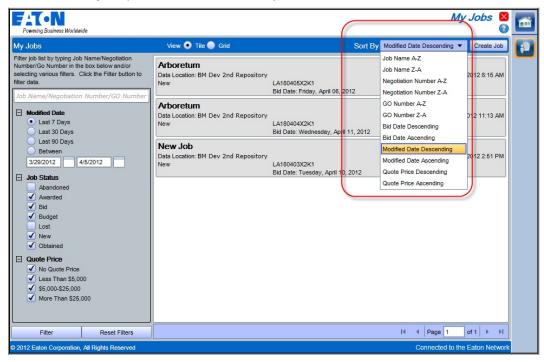


- **3.** Copy job information to your clipboard using the small copy icon in the right corner of each job tile.
- 4. Select the **Grid** style from the View options at the top of the window to view the jobs list in a condensed format. Click on a column header in the Grid view to sort by that column.

Recent Jobs		View: 🔵 Tile 💽 Grid				Create Job	
ilter job list by typing Job Name/Negotiation lumber/Go Number in the box below and/or	Status	Job Name	Neg Number	Job Status	GO Number	Bid Date 🔺	
electing various filters. Click the Filter button to Iter data.		TEST for teaching 01	QA010425X2K1	Budget		-	
	1	EMEA Test QA01	QA010425X2K3	Budget			
qa01		Import XML Test QA01	QA010425X2K2	Budget			
Job Status		test 01	QA010419X2K1	Budget			
Abandoned		medium voltage	qa010423X2K1	Budget			
Awarded		Testing Currency	QA010420X2K1	Budget			
Bid		Express Park	qa010417X2K2	Budget			
Budget		New Job 2	qa010416X2K5	Budget			
↓ Lost		Test Scripts Jason A	QA010416X2K1	New		4/16/2012 7:0	
✓ Obtained		New Job 3	qa010416X2K6	Bid		4/16/2012 11:	
		Test new job	qa010416X2K3	New		4/17/2012 7:0	
Quote Price No Quote Price		Loose Products Vs. Engineered	qa010417X2K1	Bid		4/17/2012 11:	
✓ Less Than 5000		EMEA Test Job 1 JA	QA010424X2K1	Bid		4/24/2012 10:	
5000-25000		BN20120430 - QA01 user created job	QA010430X2K1	New		4/30/2012 4:0	
More Than 25000		Valley School	QA010503X2K1	Budget		5/8/2012 7:00	
	10						



5. Use the Sort By drop down menu to sort the job list.

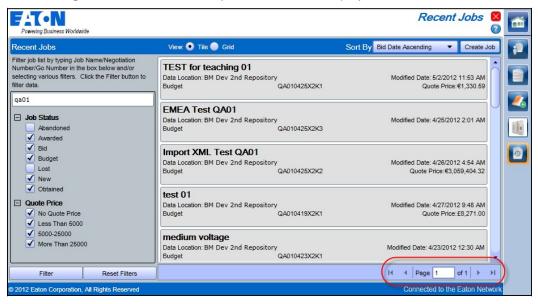


6. Use the **Filter** options on the left to refine the list.

My Jobs	View: 💿 Tile 🔵 Grid	Sort By M	odified Date Descending 🔻 Create Job
Filter job list by typing Job Name/Negotiation Number/Go Number in the box below and/or selecting various filters. Click the Filter button to filter data. Job Name/Negotiation Number/GO Numb	New	LA180405X2K1 Bid Date: Friday, April 06, 2012	Modified Date: 4/5/2012 8:15 AM
Modified Date     Last 7 Days     Last 30 Days	Arboretum Data Location: BM Dev 2nd Repository New	LA180404X2K1 Bid Date: Wednesday, April 11, 2012	Modified Date: 4/4/2012 11:13 AM
Last 90 Days Between 3/29/2012 4/5/2012	New Job Data Location: BM Dev 2nd Repository New	LA180403X2K1 Bid Date: Tuesday, April 10, 2012	Modified Date: 4/3/2012 2:51 PM
Job Status       Abandoned       ✓ Awarded       ✓ Bid       ✓ Budget       Lost       ✓ New       ✓ Obtained			
Quote Price <ul> <li>Quote Price</li> <li>No Quote Price</li> <li>Less Than \$5,000</li> <li>S5,000-325,000</li> <li>More Than \$25,000</li> </ul>			
Filter Reset Filters			I



7. Use the **Page** selection to see more jobs than can be displayed in the window.



8. Enter search text (a minimum of three characters) or select search options in the **Search for Jobs** window to find a job on the server.

Powering Business Worldwide		Job Search 🛿 Ø	
Job Search	View: 💽 Tile 🔵 Grid	Sort By: Job Name A-Z 🔹	61
Search Text Enter some text in the field below. This text will be used to search General Order numbers, Negotiation numbers, Job Names, Customer numbers and the job owner's name and Bid Manager ID.	Arboretum Data Location: BM Dev 2nd Repositor New LA180404X2K1 Bid Date: Wednesday, April 11, 2012	Modified Date: 4/4/2012 11:13 AM	
Search Text	Arboretum		
arboretum	Data Location: BM Dev 2nd Repositor New LA180405X2K1	Modified Date: 4/5/2012 8:15 AM	
Date Ranges     Order Date	Bid Date: Friday, April 06, 2012		
4/5/2012 4/5/2012			
Bid Date			
4/5/2012 4/5/2012			
Modified Date 4/5/2012 4/5/2012			
Campaign         Stimulus Initiative       Either       Yes       No         GSA       Either       Yes       No         LEED Certification       Either       Yes       No         Target Project       Either       Yes       No         Solar Project       Either       Yes       No         Wind Project       Either       Yes       No         Location       Geography Filter       LOS ANGELES (1453-3)       V			
Search Save		I III Page 1 of 1 ► ►I	
		Connected to the Eaton Network	



### Save a Custom Search

1. After using the **Search for Jobs** function, in the lower right corner of the filter panel, click **Save** to record the search as a custom search

		Job Search		
Job Search	View: 💿 Tile 🌑 Grid	Sort By: Job Name A-Z	•	R
Search Text Enter some text in the field below. This text will be used to search General Order numbers, Negotiation numbers, Job Names, Customer numbers and the job owner's name and Bid Manager ID.	BN20120430 - QA01 user created job Data Location: BM Dev 2nd Reposi New QA010430X2K1 Bid Date: Sunday, April 29, 2012	Modified Date: 4/30/2012 10:39 AM Quote Price:€58,152.04		
Search Text qa01 Date Ranges	EMEA Test Job 1 JA Data Location: BM Dev 2nd Reposi Bid Bid Date: Tuesday, April 24, 2012	Modified Date: 4/23/2012 11:54 PM Quote Price:€50,708.62		
Order Date           5/22/2012           Bid Date           5/22/2012           5/22/2012	EMEA Test QA01 Data Location: BM Dev 2nd Reposi Budget QA010425X2K3	Modified Date: 4/25/2012 2:01 AM		
Modified Date     5/22/2012     5/22/2012     5/22/2012     Campaign	Express Park Data Location: BM Dev 2nd Reposi Budget QA010417X2K2	Modified Date: 4/17/2012 2:57 AM Quote Price:£1,121.82		
E Location	Import XML Test QA01 Data Location: BM Dev 2nd Reposi Budget QA010425X2K2	Modified Date: 4/26/2012 4:54 AM Quote Price:€3,059,404.32		
Search Save	Loose Products Vs. Engineered	I4 4 Page 1 of 1 ▶	Ų ►	
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2. Type in a name and description for the custom search in the resulting pop up window, and click **Save**.





3. A new icon with the custom name will appear in the Views section of the Home Page.



- 4. To delete a custom search, click on the new custom search icon.
- 5. In the bottom of the filter panel, click **Delete**.



# Share a Job

Jobs and alternates can be shared with one or more colleagues in order to gain help in configuring a product, approving a price, or sharing data. Users can access jobs that are shared with them in the "Shared Jobs" view.

#### **Procedures in this Job Aid:**

- Default Sharing Options
- Share a Job with Coworkers in your Organization
- External Sharing

# **Default Sharing Options**

Default sharing options set the sharing options for all NEW jobs. Each job can be further customized after creating it.

1. From the Bid Manager Home page click **My Account**.



2. Click the **Job Defaults** tab and select the default sharing options. The Sharing Details section explains each category of sharing.

Access Level	Description
No Access	The job is hidden from the group or individual until another process such as Price Requests forces the job to be visible.
Read Only	The job is visible but nothing can be changed
Restricted	The job is Read Only except new Alternates can be added. Edits are only allowed on the alternates created by the user.
Full Access	All aspects of the job can be edited. Note: Only the job owner can change sharing settings or delete the job.



**3.** Choose a default access level for your group. Depending on your user access, you may have one or more groups. The default access level for the smallest group cannot be more restrictive than your largest group.

Note: The screen shown is for a Sales User.

4 <b>T•N</b>	My Account 🛛	
owering Business Worldwide	Ø	
ly Information Notifications Job Defaults		
Set the default properties you would like applied to new jobs you create.		
Sharing Defaults		
You can share the job with other users in your organization. Use the settings below to chose which users you would like to share the job with.		
Sharing Details		T
No access The job is hidden from the group or individual until another process	s such as Price Requests forces the job to be visible.	L
Read only The job is visible but nothing can be changed. Restricted The job is Read Only except new Alternates can be added. Edits a	re restricted to the newly created Alternate only	
Full access All aspects of the job can be edited.	,,,,,,,, .	
Access level for users in my sales District:		
No access     Read only     Restricted     Full access		
Access level for users in my Team (cannot be more restrictive than the District A	occess):	
No access Read only Restricted Full access		
	Save Cancel	
		J
2 Eaton Corporation, All Rights Reserved	Connected to the Eaton Network	C

User Type	Description
US Sales User	May set default sharing options for their District and Team (sales office).
Distributors/Customers Plant Users	May set default sharing options for their Company and Branch. May set default sharing options for their Product Line.

# Share a Job with Coworkers in your Organization

**1.** From the home screen, create a new job, or use a view to find and open an existing job.



2. Click Sharing in the left side tabs.

Powering Business Worldwide	Test-QA010515X2K1 🛿 👩
Home Alternate	ns Service Horizontal Vertical
Items       Sharing Details         Properties       Access level for users in my sales Distriction         Customers       No access	users you would like to share the job with. ict: Restricted Full access not be more restrictive than the District Access):
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- 3. Default sharing levels are shown and can be changed.
- 4. To add a specific person for share permissions, click the **New User Share** button and enter the user's last name or Bid Manager ID to search.

test	Searc
BID MAN RELEASE TEST (ZZ0Y)	No access Read only  Restricted  Full access
BID MAN RELEASE TEST (ZZ0Z)	No access Read only Restricted Full access
DIST TEST (TD01)	No access Read only Restricted Full access
EESS APPROV TEST ID (TST1)	No access Read only Restricted Full access
EESS REQ TEST ID (TST2)	No access Read only Restricted Full access
EURP PLANT TEST 1 (QA07)	No access Read only Restricted Full access

- **5.** A list of users matching the search will be displayed. Select the users to share with and the level of access to share.
- 6. Click the Add button.

**Note**: If a user has a default setting of "Full Access," for their entire team, but then specifies a <u>member</u> of their team as "No Access", that team member will NOT be able to see the job in Team view, share view or search view. Individually shared jobs take top precedence, followed by team, then district or company.

7. Save the job. Sharing is not activated until the job is saved.



## **External Sharing**

Share an alternate with someone outside of your company by using External Sharing. External Sharing operates at the alternate level. The Customers and Documents left side tab WILL NOT be shared to external users. Notes are optionally shared.

- **1.** Open an alternate in a Job.
- 2. Click the Alternate tab.

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Add		E	dit	Test	Sharing	
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Customers	Ð	0		10	Pow-R-Line4	P4D600BT18AH01
Market Data	Ð			5	Dry Type Transformer	
Notes	Ð			1	Dry Type Transformer Freedom MCC	
Documents		-			Trougon MCC	
Sharing						41

- 3. Click the External Sharing button in the ribbon bar.
- 4. Select an external Bid Manager user from the dropdown menu.

Note: This will vary depending on your user type. The option to search for another

user using the drop down menu and binoculars icon.

Shares for Alternate 0000 - Base	
	w, then click the check box for the line representing his alternate with. Click the search button to the he job.
Note: Changing the selection in the dropdow selection. Also, when checking the line reprice cleared.	n will clear shares for the previous customer esenting the customer, all user shares will be
ABC ELECTRIC	- 47
ABC ELECTRIC	Read only • Full access
	Close

- 5. Select the external sharing partner and a level of access to share.
- 6. Click Close.

**Note**: An alternate can only be shared with one external partner at a time. To share with more than one partner, create duplicate alternates.

#### **Related topics:**

- Create a Job
- Find and Manage Jobs and Views



# **Terminology in the Edit Items Screen**

# Market Multiplier and Market Price

Pricing begins in the takeoff. Plant users (only) may select a Market Price List (corresponding to where the product is made – UK, USA, or EU) in the takeoff. Sales users have the Market Price List pre-selected based on their geography. This generates a List Price in a corresponding currency seen in the takeoff.

Bid Manager consolidates Book Price and List Price into a term called **Total Market List Price**.

Bid Manager determines if the product price should be adjusted for the market into which it is being sold, and uses the combination of Market Price List (from the takeoff) and a **Market Multiplier** to do this. The Market Multiplier is selected for appropriate products by the product teams. Product Managers adjust the Market Multiplier from within BidManager using the new **Pricing Management Tool**.

Regardless of whether or not the List Price is adjusted by the Market Multiplier, it is adjusted for the appropriate currency, see the *Select a Currency* Job Aid, and becomes the **Total Market List Price**. The Total Market List Price is the first price in the pricing process that can be viewed in the Edit Items screen (see Figure 1).

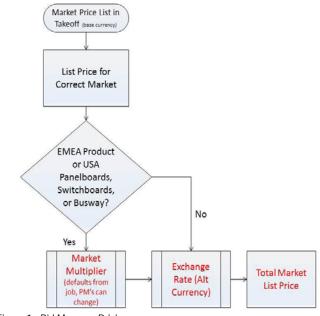
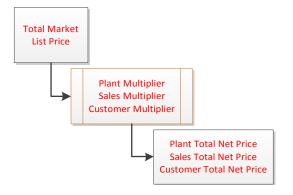


Figure 1: Bid Manager Pricing



### **Multipliers and Total Net Price**

In Edit Items, the user (Plant, Sales or Customer) enters a multiplier to discount the Total Market List price. The terminology has changed for these multipliers in new Bid Manager. Plant/Sales/Customer **X Book and X List** have been combined to **Plant/Sales/Customer Multiplier**. The result of the **Total Market List Price** multiplied by the **Plant/Sales/Customer Multiplier** is the **Plant/Sales/Customer Total Net Price**.





### **Quote Multiplier**

Users have the option of applying an additional multiplier called the **Quote Multiplier**. The **Quote Multiplier** INCREASES the price (Quote Multipliers mustbe greater than 1.0). In the US, distributors use this to add and calculate distributor margin. The result of the **Sales/Customer Total Net Price** multiplied by the **Quote Multiplier** is the **Quote Net Price**. Plant users cannot apply a quote multiplier multiplier to the Plant Total Net Price. Only the Sales Total Net Price or the Customer Total Net Price can be used to calculate the Quote Total Net Price (customer's final price). If a plant user wants to apply a quote multiplier, they must first copy the plant multiplier into the sales multiplier column. This is only allowed if the plant user is the owner of the job. See below for more explanation.





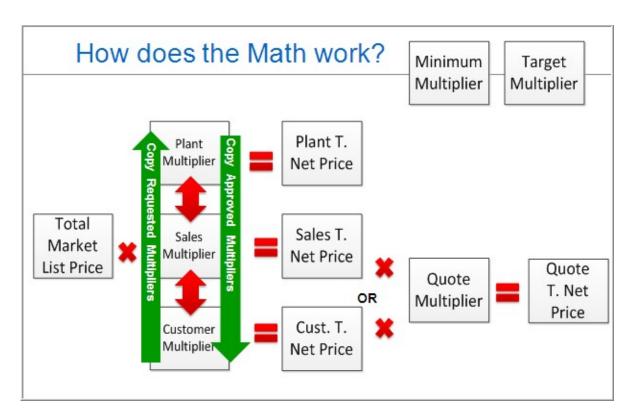
# Copy Approved Multipliers/Copy Requested Multipliers

During the pricing approval process, plant, sales, and customers negotiate for the correct multiplier to use to calculate the customers final price (Quote Total Net Price). The hierarchy is Plant  $\rightarrow$  Sales  $\rightarrow$  Customers, with Plant users being at the top of the hierarchy. If a multiplier value falls outside of the approved range for a Sales or Customer user (as denoted by the Minimum and Target multiplier reference columns), it will turn red. In order to gain approval for the deviant value, the next higher level (Plant or Sales) in the hierarchy must "approve" the deviation by entering a value in their own column. This entry serves as approval.

To gain approval for a deviant/red value, the job owner must request authorized pricing. Once the approver enters a value into their own column, the job owner can copy that value to their own column using the **Review Response** button, and clicking accept. This will transfer multipliers DOWN the hierarchy, and turn the requested multiplier blue to denote approval.

Approvers (Plant or Sales users) can use the **Copy Requested Multipliers** button in the Edit Items screen to move values UP the hierarchy of multiplier columns. This is used as a time saver. Rather than manually typing in all requested values, users can transfer all values in all rows from the lower hierarchical multiplier column to their own at once using the **Copy Requested Multipliers**, and then over-type any needed changes.

Approvers editing jobs they do not own may not alter values in columns other than their own.



Approvers *editing their own* jobs <u>may</u> use the **Copy Approved Multipliers** to instantly copy multiplier values down the hierarchy of multiplier columns.



# **Price a Job**

After adding products/items to an alternate, pricing is confirmed and/or updated in the **Edit Items** screen. Newly created items/takeoffs will always have the latest pricing. Previously saved items require the user to open and re-save the takeoff to update pricing.

The first price shown in Edit Items is the Total Market List Price. They are manually adjusted (depending on the user type) by the **Plant, Sales, and Customer Multiplier** to become the **Plant, Sales, and Customer Total Net Price.** End user prices are then adjusted using the **Quote Multiplier**.

#### Procedures in this Job Aid:

- Access the Edit Items Screen
- <u>Change Views and Columns in Edit Items</u>
- <u>Change Currency in Edit Items</u>
- <u>Assign Item Numbers</u>
- <u>Apply Multipliers (depending on user type)</u>
- Copy Pricing to a Spreadsheet
- Lock in Pricing
- Leave Edit Items

### Access the Edit Items Screen

- 1. Open the desired job. For more information, see Edit a Job.
- 2. Using the Overview left side tab click on the desired alternate. The **Items** left side tab will display.
- 3. On the Home top tab, click the Edit Items button

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## Change Views and Columns in the Edit Items Screen

- 4. In Edit Items screen, click the **View** tab on the top left of the screen.
- **5.** The ribbon bar displays several choices for changing the view of the edit items screen.



#### Change the Column Setup

The **Column setup** button allows customization of the **Primary View, Secondary View and Tertiary View** buttons. These are defaulted to recommended views for the user types. Three different column sets can be changed and saved on the edit items screen.

- a. Click the Column setup button.
- **b.** The Column Setup window opens. Click on the **Primary View**, **Secondary View**, **or Tertiary View** tab to be changed.
- c. On the left **Available Columns** pane select all the columns to appear for the view selected. A check mark will appear beside the selected items. Select or deselect all values in a category by clicking on the bolded value.
- Arrange the order of those columns by moving them up or down in the right Selected Columns Order pane by clicking the Move Up or Move Down buttons.
- e. Click Restore Default Columns to reset the columns to their default setting.



Column Setup Primary View Secondary View		lso ch	sible for this view by checking or unchecking them nange their order by selecting them in the Selected	23	
Tertiary View	Available Columns:	_	Selected Columns Order:		
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	🖃 🗹 Price		Product ID		
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			OK Cancel	Î	

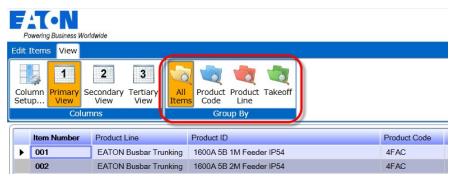
f. Click **OK** to set the column selections for that view.

**Note:** Once in the edit items screen further adjustments can be made by dragging and dropping columns to in the desired order from left to right.

#### Change the way items are grouped in rows

There are also four Product View buttons that change the grouping of item rows. Click any of these buttons to change the way items/rows are grouped from top to bottom. When grouped, change multiple line item multipliers at one time.

- All Items: Displays all line items individually
- Product Code: Groups items by Product Code
- **Product Line:** Groups Items by Product Line
- Takeoff: Groups Items by Product Takeoff





## Change the Currency in Edit Items

Change the currency for the selected alternate at any time by using the **Alt Currency** drop down menu.

- 1. In the Pricing top tab, choose a currency from the **Alt Currency** drop down menu.
- 2. Update the currency exchange rate information to the latest Eaton exchange rates at any time by clicking the **Update Exchange Rates** button.

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### **Assign Item Numbers**

A complete bill of material must have item numbers.

- 1. To Assign Item Numbers, click the button on the Edit Items top tab.
- 2. Or, manually type them in.

**Note:** In the Documentation Service, Tab 2, select to organize your documents by item number or power flow. Manually assigning items in edit items will allow you to print them in a specified order.

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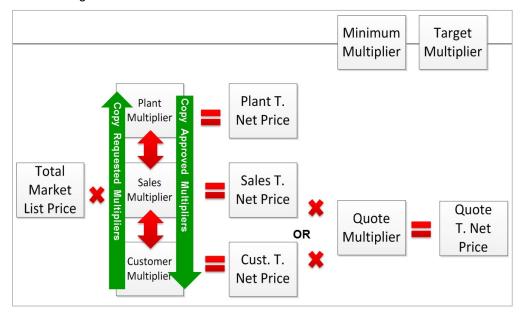
3. Click **Explode Items** when there are product lines will only accept a single quantity per line item.

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**Note:** Product configurations and Quantities can still be edited, however Items will need to be exploded before Order Entry.

# Apply Multipliers (depending on user type)

To adjust a **Total Net Price**, enter a value in the appropriate Multiplier column. Plant, Sales, and Customer user types each have respective **Multiplier** columns. Total Market List Price multiplied by the Plant/Sales/Customer Multiplier equals the **Plant/Sales/Customer Total Net Price** column. Users may also have a **Minimum and Target Multiplier** columns to use as a reference. In addition, all user types may enter a **Quote Multiplier**, which increases the Plant/Sales/Customer Total Net Price to calculate the **Quote Total Net Price.** The **Quote Total Net Price** is printed in the Document Services Package and is shown to end users.



Edit Item screen numbers follow these rules:

• Any number shown in **bold** may be changed by the user.



- Multipliers are shown in **blue**
- Calculated values are shown in **black.**
- Multipliers will turn red if they fall below the approved Minimum Multiplier.
- 1. Depending on the user type, enter a value in the **Plant, Sales, or Customer Multiplier** column.
- 2. Values less than 1 will reduce the **Plant, Sales, or Customer Total Net Price**. Values greater than 1 will raise the price.
- 3. When the value in the **Plant, Sales, or Customer Multiplier** column is less than the value in the minimum Multiplier column, it will turn red. This indicates the price is too low and requires approval to quote the customer or place an order. Refer to the *Request Authorized Pricing* job aid for more information.
- 4. The Plant/Sales/Customer Total Net Price will calculate automatically (Total Market List Price x Multiplier = Total Net Price).
- 5. Optionally, enter a value in the **Plant/Sales/Customer Total Net Price** column, and the multiplier will calculate.
- 6. Optionally, enter a value greater than 1 in the **Quote Multiplier**. This calculates the **Quote Total Net Price**, which is show to end users in the Document Services Package.

## Copy Pricing to a Spreadsheet

An Item in the Edit Items screen may be selected and copied to a spreadsheet using the Copy and Paste functions of your operating system.

- 1. Select the line items to copy by clicking in the far left column. This will highlight the row in orange.
- **2.** Alternately, use the shift and/or control keys to select a group of contiguous/non-contiguous rows.
- 3. Click on the **Copy** or **Copy All** buttons in the Edit Items top tab, or use Ctrl+C on your keyboard.
- 4. Open a spreadsheet application (Excel) on your computer.



**5.** Right click on the destination cell in the spreadsheet, and select **Paste** or use Ctrl+V on the keyboard.

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### Leave Edit Items

When pricing is complete, click the **Leave Edit Items** button in the Edit Items top tab to save values and return to the job view.

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	Xiria Switchboard	1.0000	1.0000 1.0000	0.0000	1.0000 1.0000	€7,303.00		•

#### **Related Topics:**

- Create a Job
- Create an Alternate
- Create an Item
- Request Authorized Pricing



# **Create a Document Package**

The Documentation Service tool is designed to assist with compiling job related documents from one or more job alternates together into a complete PDF document package. Any document can be added into this package, and many standard documents are available for selection. The compiled PDF document can be downloaded from the documentation service server using a link provided via email. The PDF package can also be sent directly as an email attachment if the package file size is less than 5MB.

#### Procedures in this Job Aid:

- Navigate to the Documentation Service
- Enter the Job Information
- Select Documents
- Configure the Package
- Submit the Package
- Set Defaults for Displaying Pricing in Document Package

### Step 1: Navigate to the Documentation Service

1. Click on Create Document Package from Actions menu in the home screen.



2. Or, open an existing alternate from within a Job and click on the **Document Service** button in the toolbar.





# Step 2: Enter the Job Information

 When the Document Service is accessed through the job screen, the alternate that was selected will be listed first. To search for a job, type a General Order (GO) Number, Negotiation (Neg) Number, Job Name, or Sales ID in the search field and press the search button. Click on the search button to add other alternate bills of

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**2.** From the search results, check the alternates to include them in the document package.



*Note*: To remove alternates, click on the trashcan icon next to the alternate name.

3. Optionally, change the Job Reporting and Regional Settings in this tab as well.

### Step 3: Select Documents

In Tab 2 of the documentation service, the document package can be customized to include specific documents in the output.

1. Select the **Organize Items By** menu to choose the order in which the items should appear.

Powering Business Worldwide		Documentation Service 🛿 Ø
1 Enter Job Info 2 Select Documents	Configure Package	Table of Contents
Organize Items By Power Flow Power Flow Item Number	Select a Standard Document Packag	Import XML Test QA01     QA010425X2K2-0000      Main Documents     No Documents Specified
Proposal Letter	None	Switchboards

- **Power Flow** selection will order the products from highest voltage to lowest voltage by product type (Switchboard, Panelboard, Safety Switch...)
- **Item Number** selection will order the products by their item number that was assigned in the Edit Items screen.
- **2.** If desired, select a **Standard Document Package**. Standard Document Packages apply a predefined structure to the document package.

Powering Business Worldwide							
1 Enter Job Info 2 Select Documents 3 Configure Package	Submit Package	Table of Contents	Enter Additional Info				
Organize Items By Select a Power Flow None None None	Standard Document Package	•	KML Test QA01 425x2k2-0000				
Main Documents		Main Documents No Documents Spec	cified				
Proposal Letter	/	Switchboards					

**Note**: If you select Full Bid or Quick Bid, you will be required to complete the information in the **Enter Additional Information** tab on the right side (the tab will turn red).

**3.** Specific documents can be manually added or removed using the drop down menus next to each document type.

*Note:* To show a price in the document package, a Bill of Material must be selected in the *Main Documents*.

Proposal Letter	North America	<b></b>	Proposal Letter (North Americ Title Page (Proposal)
🥞 Title Page	Proposal	•	Table of Contents (Standard)
Table of Contents	Standard	•	Panelboards
Combined Bill of Material For All Items	None	•	No Documents Specified
Selling Policy	None		<b>Closing Documents</b>
	Detailed		No Documents Specified
Comments & Clarifications	Intermediate		
Product Line Specific	Summary		
Separate Bills of Material by Product	Detailed	▼ ()	
Drawings	Approval	•	
Literature	Submittal	•	

# Step 4: Configure the Package

In tab 3 of the documentation service, external documents can be added. All documents and product line groupings by folder can be re-arranged for order and placement in the package. Product folders can be added and .XPS files can be edited or previewed.

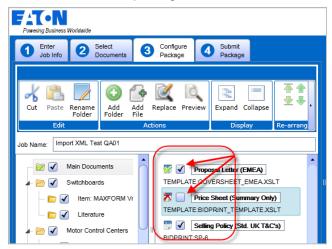
**1.** Use the buttons in the ribbon bar to configure the document package.

Powering Business Worldwide		Documentation Service 8
Enter Select Job Info O Select Documents	3 Configure Package Submit Package	Table of Contents
Cut Paste Rename Folder Edit Job Name: Import XML Test GAD1	Add Replace Preview Add Replace Preview Actions  Proposal Letter (EMEA) TEMPLATE:COVERSHEET_EMEAXSLT W  TEMPLATE:COVERSHEET_EMEAXSLT	Product (Detailed) QA010425X2K2 <0000>: Approval Drawings (AB Shanks) ESS Site Services - UK (Install) QA010425X2K2 <0000>: Separate Bills of Material by Product (Detailed) QA010425X2K2 <0000>: Approval Drawings (INSTCOST) Secondary Switchgear QA010425X2K2 <0000>: Separate Bills of Material by Product (Detailed) QA010425X2K2 <0000>: Approval Drawings (MV Panel) XRA
Button Group	Button Name	Description
Edit	Cut	Cut a folder or document
	Paste	Paste the cut folder
	Rename Folder	Rename the selected folder
Actions	Add Folder Add File	Add a Product Line Folder Add a file from a local drive
	Replace	Replace selected item with another
	Preview	Preview document (documents can be preview ed in XPS format which can be edited. If the user changes a previewed document and wants the change to be in the package. They will first need to save the changed document to their local PC then r eload it into the package with the Add File or Replace feature.)
Display	Expand	Expand the folder view
	Collapse	Collapse the folder view
Re-Arrange	Move up/down	Move by one line at a time
	Move top/bottom	Move to the extreme top or bottom of order

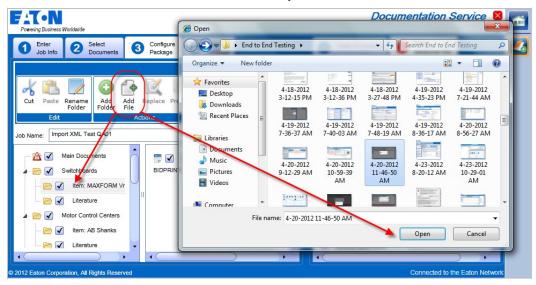
Note: Within this tab files can be moved folder to folder by using drag and drop.



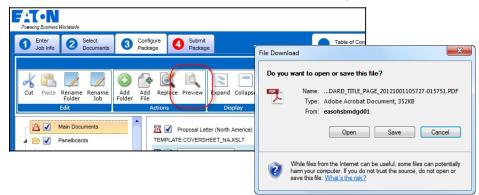
2. Select or unselect items with the check mark box next to the item to show or hide the document in the final package.



**3.** External files can be added into the document package by using the **Add File** button. Files will be added into the folder that is currently selected.



4. Select a document and click the Preview button to see a preview of that document.





## Step 5: Submit the Package

In tab 4 of the documentation service, additional information may be required before submitting the package, that information will be highlighted in red. The document package will be created in a PDF format that will be available for download via a link provided in an email response. If the package is less than 5MB it can be requested as a pdf attachment in the email with the link. The document package will be available for 72 hours using the provided link.

 Enter the email address to which the document package link will be sent to. Additional email recipients can be added here, or the email can be forwarded after it has been received.

<b>PATON</b> Powering Business Worldwide	ntation Service 🛿 🛅
Enter         Select         Configure         Submit         Table of Contents         Enter           Job Info         Documents         Package         Table of Contents         Enter	l Info
Please enter the email address(es) where you would like to send your completed document       Image: Current Selections         Email Address       Email Address         Final document as link only.       Final document as link and as a PDF email attachment.         Filter results by Country:       Vista ID:         Recipient Company Name       Email Address:         Address:       Email Address         Email Address       Email Address         Submit       Email Address	t from the list below, or
© 2012 Eaton Corporation, All Rights Reserved C	Connected to the Eaton Network

2. If the tab is marked by a red asterisk, fill in the fields highlighted in red under the Enter Additional Info tab (these sections can be collapsed by clicking on the arrow button).

Powering Business Worldwide			Documentation Service	X
1 Enter Job Info 2 Select Documents	Configure Package	4 Submit Package	Table of Contents Enter Additional Info	
Please enter the email address(es) wh	ere you would like to	send your completed	nt Customer Information *	
Email Address:	you@email.com			
Additional Email Addresses:			Current Selections Search	
Email Address 2:			Please enter text in the search field below and click the Search button	
Email Address 3:			to search for a customer, then select a result from the list below, or manually enter the customer information in the fields below.	
Email Address A			Search: Search	

3. Click the **Submit** button.

**Note**: If the submit button is grey and unavailable; information may be missing from the previous tabs. If information has been entered in the past, Bid Manager will attempt to auto populate the fields when text is being entered.



# Table of Contents & Enter Additional Information Tabs

The **Table of Contents** tab shows the documents that will be included in the package and the order that they will appear.

The Enter Additional Info tab is where customer information, proposal letter recipient, and sender information is required to be entered. The final document will be populated using this information. Collapse and expand the information sections by clicking on the arrow next to them.

Table of Cont	ents Enter Additional Info
Customer Info     Proposal Lette	
First Name *:	·
Last Name *: Doe,	
Sender Inform	ation *
First Name *:	
Last Name *:	
Job Title *:	
Address 1 *:	
Address 2:	
City *:	
State *:	
Zip Code *:	
Phone Number *:	
Email *:	
•	) •

Table of Contents Enter Additional Info Geothermal Facility Yukon1 Geothermal Facility Yukon1 Main Documents Proposal Letter (North America) Title 96 (Proposal) Table of Content (Standard with Page Numbers) Selling Policy (23-000) Panelboards Separate Bills of Material by Product (Detailed) Tem 0021 (Approval Drawings): P1A225LT4P01 Item 0021 (Approval Drawings): P1A25LT4P01 Item 0021 (Approval Drawings): P1A25LT4P01 Item 003 (Approval Drawings): V48M28T75EE Closing Documents - No Documents Specified --

In the **Customer Information** area, Bid Manager imports the customer information that was selected when the job was created. To populate the customer information fields with an imported customer, click on that customer name from the list. To add new customer information to the document package, click on the Search tab within that area.





# **Email Response and PDF Document**

The email response from the submitted document request will include a link where the document is available for download for 72 hours. This link can be forwarded to any desired recipient.

🖂 🗒 🎝 U 🔺	🧇   ╤ Bid Manager Document Serv	ice LA180928X2K2-0000_Brave	_Business_Park_FullBid	_20121001-120727.P	DF - Message (H		x	
File Messag	e Developer Add-Ins					\$	0	
ignore X & Junk → Delete Delete	Reply Reply Forward Repond	Image: Second secon	Move Move	Mark Unread Categorize * Follow Up *	Translate Editing	Q Zoom Zoom		
		Quick Steps in	MOVE	Tugs III			DM	
From:       ManualNotification@eaton.com       Sent:       Mon 10/1/2012 12:08 PM         To: <ul> <li>Cc:</li> <li>Subject:</li> <li>Bid Manager Document Service LA180928X2K2-0000_Bravo_Business_Park_FullBid_20121001-120727.PDF</li> </ul> <ul> <li>Your request documentation has been generated. The links are good for 72 hours, please save the files for your records.</li> <li>LA180928X2K2-0000 Bravo Business Park FullBid 20121001-120727.PDF</li> <li>This is an automated message; please do not reply to it.</li> </ul>								
							-	
ManualNo	tification@eaton.com					22	^	

Note: The PDF file will contain bookmarks and a table of contents if selected in tab2.

## **Quick Print**

When a full document package is not needed, a Bill of Material or Product Drawings can be quickly printed with the Quick Print tool.

- 1. Select an alternate to quick print.
- 2. In the Home top tab, click the Quick Print button.



3. Enter your email address in email field.



4. Select the type documents to print.

**Note**: The level of detail for the Bill of Material can be selected in the My Account settings.

Powering Business Worldwide	Huron Landing	: LA180318X3K1 🛛	<b>^</b>
Home Alternate	Quick Print*		;2
Pricing Edit Mode Job	Email Address	Drder Product	
Overview Items Properties Overview Huron Landing - Job Owner: JASON	joe@eaton.com Options: (L BOM Approval Drawings	A180318X3K1 Created: 3/18/2013 8:23 AM Editing Reporting Alternate: 0001 Editing	
Customers 0000 - Base Alternate Cre		USD	
Market Data Created: 3/18/2013 8:28 AM Updated		Sales Total Net Price: \$1,080.73	
Notes (3) 0001 - Jason Alternate Cre	аtc : З/тъ/2013 9:21 АМ	USD Sales Total Net Price: \$324.22	

- 5. Click on the Quick Print button.
- 6. Check your email for the .doc (Bill of Material) or .pdf (Product Drawings) file.

## Set Defaults for Displaying Pricing in Document Package

- 1. In the Home screen, click on **My Account**.
- 2. Click on the Document Formats tab.
- 3. Select the document format defaults in the drop down menus.
- 4. Click Save.

Powering Business Worldwide		My Account 🛿 🞯	
My Information Notification	Job Defaults Document Formats		;
Document Formats			
Quick Print Pricing Quick Print BOM Level	No Pricing Information		i
Document Service Pricing	No Pricing Information		
		Save Cancel	



# **Distributor Request For Authorized Price**

Users may need to adjust pricing below authorized minimums (shown in the minimum multiplier column). Use the Request Authorized Pricing process to obtain approved pricing before placing an order with the lower price.

#### Procedures in this Job Aid:

- Adjust Multipliers
- Request Authorization
- The Review Process
- <u>Accept Authorized Price</u>

#### Step 1: Adjust Multipliers

1. Navigate to the job and select an alternate.



- 2. Click on the Edit Items button in the Home toolbar.
- 3. Change multipliers in the Customer Multiplier column.

### Step 2: Request Authorization

1. Click on the **Request Authorization** button from the **Pricing** top tab of the Edit Items toolbar.



2. Verify the job information and select Competition, Sales Rep, and End User/Contractor.

Customer Requ	lest For Quote		
Shively Re	egional Hospital		D0L60221X3K1 - 0000
Please pro	ovide information about the job.		
My Email*	EAlecrim@ces-us.net	Competition	SquareD 💌
Sales Rep*	SAM FAYLO 🗸	End User / Contractor	
	plain why you are requesting lower levels.		
Notes	This is a strategic job that could lead to winning mor	e bids.	
			Send Cancel



- **3.** If necessary, click on the search button **w** to find an **End User/Contractor**.
- 4. Select a recently used customer or search for a new one.
- 5. Select a customer from the list on the left side and click on the arrow to move it into the column on the right.

ick on the customer then click 📫 to add to cust		HD SUPPLY ELECTRICAL CHARLOTTE NC 019584	Durch a size Faith
MISC WESCO (I) DSTRB PITTSBURGH PA 025045	End Customer	019564	Purchasing Entity
Miscellaneous Customer P35164	End Customer		
SMITH BROS SUPPLY CO 030021 P	urchasing Entity		
SMITH ELECTRIC OF CHARLOTTE 003088	End Customer		
SMITH ELECTRIC SANTA MARIA CA 010136	End Customer		

- **6.** Type an explanation in the notes section to tell the product line why the special pricing is needed.
- 7. Verify all the information is correct and then click **Send**.



# Step 3: The Review Process

An Eaton sales representative will review the authorization request. A customer can monitor the authorization status with the Price Request Management view or by viewing the alternate in the job.

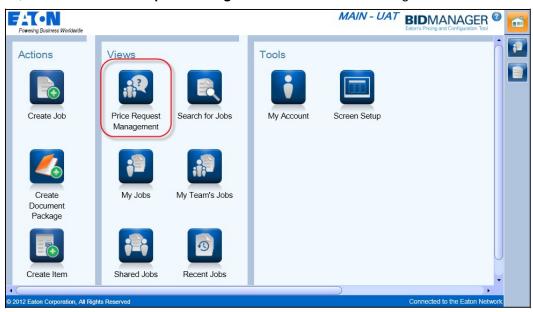
#### Check the Status of the DRFQ

1. Open the alternate and view the status icons next to each item.

Powering Business Worldwid	9		Shi	ively F	Regional Hospi	ital : D0L6	0221X3K1 🛛 Ø
Home Alternate							<u>م</u>
Edit Items Job	Save Reload Duplicate De	kete Dob Quick			<ul> <li>□ Deselect All S Edi</li> <li>✓ Select All</li></ul>	t 🗙 Delete	hanges
Pricing Edit Mode	Job	L.	Ocumentation	Order	Proc	luct	
	000 - Base V Currency: USD						6
Items	Status Item Number	Quantity	Product Code	Product ID	Catalog Number	Designation	Total Market List Price
Properties		4	3334	Pow-R-Lin	e4 P4A250LTAH01		\$3,88
Customers Market Data Notes							

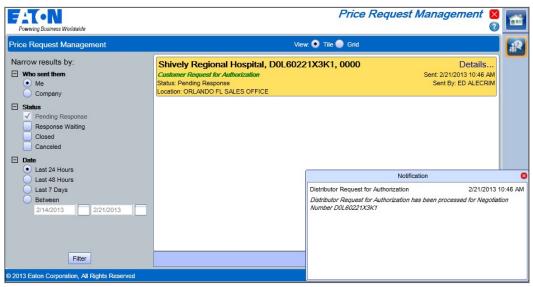
Status	lcon	Definition
Needs Approval		Multiplier is below the value in the Minimum Multiplier column.
Pending Response	?	Requestor has sent DRFQ and is waiting a response from Approver
Response Waiting	2	Approver has sent a response and is waiting for Requestor to respond
Closed		
Approved	0	Approver has approved the requested price.





2. Or, click on the Price Request Management view on the Bid Manager home screen.

3. Filter the requests using the options on the left side of the window.



**Note**: A notification will pop up when a request is sent. Select the **Grid View** at the top of the screen to view the requests in a spreadsheet type view.



## Step 4: Accept Authorized Price

Once Eaton responds to a DRFQ, open the job to accept or resubmit the request.

- 1. Click on the Price Request Management view.
- Filter the requests using the options on the left side of the window to find the DDRFQ.
   Note: Click on the Details link for more information.
- **3.** Click on the grey job tile to open the DDRFQ. The job will open directly to the Edit Items screen.
- 3. Click the **Review Response** button on the **Pricing** top tab to accept the approval.



 Review the response to your pricing request. Choose to Accept the response or click Exit to close the window. Once accepted you can then alter the multiplier and resubmit the DRFQ if needed or submit as an order.

Requested       Approved         Customer Total Net Price: \$466.12       Customer Total Net Price: \$466.12         Quantity: 4       Customer Multiplier: 0.12       Quantity: 4       Customer Multiplier: 0.12         Item: Box, Box       Approved       Customer Total Net Price: \$0.00       Customer Total Net Price: \$0.00         Customer Total Net Price: \$0.00       Customer Total Net Price: \$0.00       Customer Multiplier: 0       Quantity: 4         Quantity: 4       Customer Multiplier: 0       Quantity: 4       Customer Multiplier: 0       Customer Multiplier: 0         Quantity: 4       Customer Multiplier: 0       Quantity: 4       Customer Multiplier: 0       Customer Multiplier: 0	Item: Pow-R-Line4,			
Quantity: 4     Customer Multiplier: 0.12     Quantity: 4     Customer Multiplier: 0.12       Item:Box, Box     Approved       Requested     Approved       Customer Total Net Price: \$0.00     Customer Total Net Price: \$0.00	Requested		Approved	
Requested         Approved           Customer Total Net Price: \$0.00         Customer Total Net Price: \$0.00	Customer Total Net Price: \$466.12		Customer Total Net Price: \$466.12	
Requested         Approved           Customer Total Net Price: \$0.00         Customer Total Net Price: \$0.00	Quantity: 4	Customer Multiplier: 0.12	Quantity: 4	Customer Multiplier: 0.12
Customer Total Net Price: \$0.00 Customer Total Net Price: \$0.00	Item:Box, Box			
	Requested		Approved	
Quantity: 4 Customer Multiplier: 0 Quantity: 4 Customer Multiplier: 0	Customer Total Net Price: \$0.00		Customer Total Net Price: \$0.00	
	Quantity: 4	Customer Multiplier: 0	Quantity: 4	Customer Multiplier: 0

Status	Description
Pending Response	Requests that have been submitted, and are awaiting a response
Response Waiting	Requests that have been responded to, and awaiting your acceptance
Closed	(No Icon) Requests that have been accepted.
Cancelled	These are requests that have been cancelled



# Enter an Order – Distributor (DOE)

After product configuration is completed, and the final bill of material has been approved for pricing and content, order entry begins. This process will send the order to the appropriate manufacturing facility to complete and ship the order.

#### Procedures in this Job Aid:

- Prepare the Alternate for Order Capture
- Enter the Purchase Order Information
- General Order Information
- Ship-to Information
- Special Shipping Requirements
- Item Information
- Save, Exit, or Send

### Prepare the Alternate for Order Capture

1. Navigate to an alternate to be ordered and open the alternate.

**Note**: When multiple alternates exist, rename the alternate being ordered as "ORDER" to easily identify it in the future.

- **2.** Confirm multipliers/pricing is correct and item numbers have been assigned in the Edit Items screen before continuing.
- **3.** Optionally, in the **Alternate** top tab, click the **Validate Alternate** button before going to Order Capture.



## Enter the Purchase Order Information - Tab 1

1. Click the **Order Entry** button in the **Home** top tab.





Items highlighted in **red** are required. When all fields highlighted in **red** are completed, the tab will turn **green**.

Order Entry	23
Home Shipping Item Information	•
Save Exit Submit Check Order Order Entry Order Express Order	
Georgian Flower Yardmart NegNumber: K5660111X3K1 Order Alternate: 0000 - Base Go Number: Order is managed by EstonCare	0
Purchase Order     Distributor's Customer	
General Order     General Order     Enter Vista Number	
Ship-to     End User same as Distributor Customer     End User	
Special Shipping Requirements <ul> <li>Search and Select</li> <li>(232558) 3 PHASE ELECTRICAL</li> <li>Ø</li> </ul> Enter Vista Number	
Information         Purchase Order Information           Purchase Order Number*         Purchase Order Date* 1/9/2013	
Purchase Order Amount \$1,994.01 Purchase Order Currency US Dollars	
Bid Manager Total Net \$1,994.01	

2. At any time, click the **Check Express Order** button to verify if the order can be submitted as an express order. A window will open to show the criteria for express orders.

Expre	ess Status
	This order is NOT an Express order based on the criteria listed.
	Corder Management will process before it is sent to the Order Entry system.
	No order entry notes are added to this order.
1	Total Variance on this order is not more or less 5.
1	No submittals are required from order management team.
	Job type is not Champs.
	Order does not require non standard products.
- <u>4</u>	The city, state/province, postal code, and country is not a valid combination.
1	Price does not exceed the limit of 100000.
	All products on this order are valid.
	OK

**3.** Complete the required fields and ensure that the Purchase Order Information is correct before continuing.



4. Choose the appropriate Distributor's Customer and End User.

**Note:** The default selection is prepopulated from the Customer information entered previous on the Job. If multiple customers/end users are named there, select the correct entity from the drop down menu. If the desired entity is not in the list, use the binoculars icon to search for and add the entity, then select it from drop down menu.

**5.** To add a new customer or end user, click on the search button (binoculars) next to the drop down menu.

Order Entry		23
Home Shipping Item I	nformation	~
Save Exit Subm Order Order Entry Orde		
Georgian Flowe	er Yardmart NegNumber: K5660111X3K1 Order Alternate: 0000 - Base Go Number: Order is managed by EatonCare	2
Purchase Order Information General Order	Distributor's Customer         Image: Search and Select         Image: Search and and and Search and Search and Search and and S	
3 Ship-to	Enter Vista Number     End User same as Distributor Customer     End User	
4 Special Shipping Requirements	Search and Select     (232558) 3 PHASE ELECTRICAL <ul> <li>Enter Vista Number</li> </ul>	
5 Item Information	Purchase Order Information Purchase Order Number* Purchase Order Date* 1/9/2013	
	Purchase Order Amount \$1,994.01 Purchase Order Currency US Dollars	

## **General Order Information - Tab 2**

Select the Documentation and Drawing Information that is pertinent to the order. Submittals, Construction Drawings, and O&M Manuals are ordered here.

**Note:** This is the most efficient way to communicate with the order entry staff and ensure that required information is delivered to your customer, so take time to consider these options.

Order Entry		23
Home Shipping Item I	nformation	•
Save Exit Subm Order Order Entry Orde		
Georgian Flowe	r Yardmart NegNumber: K5660111X3K1 Order Alternate: 0000 - Base Go Number: Order is managed by EatonCare	<b>1</b>
Purchase Order Information	Documentation     Submittals required from Order Management	
2 General Order Information	Construction Drawings required O&M Manual required from Order Management	
3 Ship-to Information	Drawing Information	



# Ship-to Information - Tab 3

Auto-Populate shipping information using the **Distributor** or **Contractor** buttons in the **Shipping** top tab, or manually type in the required information. All fields in **red** are required.

Order Entry		23
Home Shipping Item In	Information	<b>^</b>
Distributor Contractor Va Shipping A	Address	
Georgian Flower	er Yardmart NegNumber: K5660111X3K1 Order Alternate: 0000 - Base Go Number: Order is managed by EatonCare	<b>1</b>
Purchase Order Information	Job Site Information Ship-to Address Type Standard  Note: Will Advise will set all items on hold.	
Ceneral Order	Company Name* 3 PHASE ELECTRICAL	
3 Ship-to Information	Address* UNIT 4	
Special Shipping Requirements	MINTO ROAD INDUSTRIAL CENTRE ASHLEY PARADE	
5 Item Information	City* BRISTOL	
	State/Province* CN Postal Code* BS2 9YW Address is NOT valid	
	Country* UNITED STATES   Invalid Address Override	
	Marks	
	Site Contact Name Site Phone	
	Shipper to call hours in advance of delivery	
	Ship Method Shippers Standard	

- 1. For Will Advise and Will Call orders, click the **Ship-to Address Type** drop-down menu and select an option.
- 2. Use the Validate button if manually entering an address.



# Special Shipping Requirements - Tab 4

Select or enter any special shipping requirements.

Order Entry	23
Home Shipping Item Information	^
Distributor Contractor Validate Clear Search Address Shipping Address	
Georgian Flower Yardmart-K5660 Go Number: Order is managed by EatonCare	<b>1</b>
Purchase Order Information          Information       Special Truck Requirements         Information       Flat Bed         Information       Union Driver         Information       Not Ship-to         Information       Not Ship Via Carrier         Information       Preferred Carrier         Information       Preferred Carrier         Information       Carrier Account Number	



## Item Information - Tab 5

1. Modify items by selecting them from the list. Selected items will be highlighted in orange.

Order Entry							23
Home Shipping Item Inform	ation						^
Ship Selected Boxes, Hold Ship Selected Boxes, Hold Ship							
Geothermal Facility	Order Location Yukon1 Go	gNumber: k5660211 Number:	n Level Dates IX3K1 Order Alterr Order is ma	nate: 0000	Selection ) - Base atonCare		<u>/</u>
Information	er Level Dates Required Ship Date 3/11/2013	· · · · ·		Expected R	elease Date		
	Level Information	inin/da/	7777	mmyady			
3 Ship-to Information	ltem Pro Number	oduct ID	Designation	ltem Status	Standard Ship Date	Required Ship Date	Do No Before
4 Special Shipping	001I Po	w-R-Line4		Hold			
Requirements	001B Bo	x	Box	Release			
5 Item	002I Po	w-R-Line1a		Hold			
mormauon	002B Bo		Box	Release			
	002T Tri		Trim	Hold			
	003 Dŋ	/ Type Transformer		Release			

**Note:** To select multiple items at once, press CTRL on the keyboard and click on additional items. Additionally, use the **Select All** or **Unselect All** buttons in the Item Information top tab.

**2.** Once the desired items are selected, use the options from the Item Information top tab to change their shipping parameters.



**3.** Select an item(s) to change the hold status and use the **Item Status** buttons in the Item Information top tab. If choosing to hold items, make a selection from the window that appears and click **OK**.

	Reason For Hold
Ship Hold Ship Selected Selected Boxes, Hold Item Status	Please select the Reason For Hold: EatonCare to provide Submittal Cancel OK

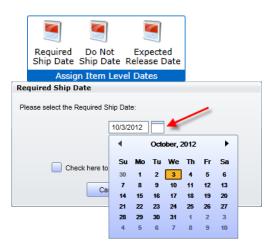
*Note:* Item status will automatically be assigned a ship date unless there is a reason for holding (e.g. - submittal drawings).



4. Select a location from the drop-down selection in the window that appears. To choose a specific location for an item to be ordered from, select the item in the list and click the **Set Order Location** button in the Item Information top tab.

	Order Location
	Please select the Order Location:
	Check here to clear the order location for the selected items
	Cancel OK
Order	

 Assign key dates to an item by selecting it from the list and clicking one of the options from the Assign Item Level Dates button grouping in the Item Information top tab. Select a date from the window that appears.



## Save, Exit, or Send

1. Click the **Save** button from the Home toolbar to save the order information.



Set

**Note**: The information will be saved and available next time you click on the Order Capture button in the alternate.

2. Click the Exit button to exit the order capture process.



**Note:** The order will not be captured if exiting. A prompt will appear asking to save the information before exiting.



3. Click the **Submit Order** button to place the order; the order will be sent to be processed immediately.



# After the Order

After clicking **Submit**, an email will be sent to confirm the order. In addition to an email notification, a box will appear on the lower right corner of the Bid Manager screen.

The Order Status View will automatically open to show the job status.

Powering Business Worldwide			Orde	er Status Viewer 🛿 Ø	₿
Order Status Viewer		View. 💽 Til	e 🔵 Grid		<b>F</b>
Filter Results By: Search Text Enter some text in the field below. This text will be used to search General Order numbers, Negotiation numbers, and Job Names. Order Entry Date ● Last 70 Days Last 90 Days Between 2/4/2013 2/11/2013 ● Required Ship Date ● Visibility ● Orders I Entered	Geothermal Facility Yukon1 G0 #.SHU0062569 Neg Number: k5660211X3K1 Status: Waiting			Details Order Entry Date: 2/11/2013 Required Ship Date: 3/11/2013 PO Amount: \$9,501.85	
Both				Notification	8
Status All Success Failed Checked Out	Order Details Geothermal Facility Yukon1		Order Processing Finished Job k5660211X3K1, order numb express to VISTA.	2/11/2013 er SHU0062569, has been accepted	
Filter	Status: Success GO #: SHU0062569	Neg Number: k5660211X Bid Date: 2/21/2013			

When you go back to review the job the alternate that was ordered will now have an order icon on the alternate bar.

Poweing Business Worldwide	Goodberry's Frozen Custard : SLA0062683 🛿 🕡	1						
Home Alternate	*							
Image: Save Reload Duplicate Assign Delete	View Deselect Select Create Edit Cut Copy Paste Delete Global							
Edit Items Edit Save Reload Duplicate Assign Delete Quick Document PDAS Assign Order Number								
Pricing Edit Mode Job Documentation Order	Product							
Overview         Goodberry's Frozen Custard         Neg #: T8140219X3K1         Reporting Atternate: 0000 Go #: SLA0062683         Job Owner: T814 (JERRY WARREN)         Editing           Items         Created 2/19/2013 8:53 AM         Ordered on 2/25/2013 10:53 AM         Ordered on 2/25/2013 10:53 AM         Editing								
Opporties         Outcomers         Alternate Creator JERRY WARREN           Customers         Created: 2/19/2013 9:05 AM         Updated: 2/19/2013 9:05 AM	USD Sales Total Net Price: \$2,464.11							
Market Data 00002 - Parsons - the best alternate Atternate Creator CAROL PAR Created: 2/19/2013 11:30 AM Updated: 2/19/2013 11:30								
Documents Sharing								



# Add Non Eaton Item (Distributors, Representatives, and Customers)

Non Eaton items can be included on a Bill of Material for quoting purposes. The item must first be added to the catalog. Once an item has been added to the catalog it can be added by selecting to add a Standard Product from the Product Configurator.

#### Procedures in this Job Aid:

- <u>Create the Non Eaton Item</u>
- Add Non Eaton Item to Job (Listed by product line)

## Create Non Eaton Item

1. Click the **Non Eaton Products Tool** from the Tools section of the Bid Manager home page.



*Note:* If the icon is not on the home page, add it using the **Screen** *Setup* icon.

2. When the Maintain Non-Eaton Catalog Numbers page loads click the Green plus sign in the upper right corner of the screen.

Powering Business Wo	nlawide	Maintain Non-Eaton Catal	log Numbers 🛛
Manufacturer Product Line Product ID		- × × - × × - ×	***
Catalog Number	Description	Unit List Price Book Multiplier	



3. Type in all the required information and click **Save**.

lanufacturer			- 🗙		
Product Line			×		
Product ID			- 🗙		
Catalog Number	Description	n 🔺	Unit List Price	Book Multiplier	
Catalog Number 0857fh	Description		Unit List Price	Book Multiplier	
-			1200.00	Book Multiplier 1 2345	
0857fh	Non Eaton	1 Item	1200.00	1	

4. The new item will appear in the Catalog list.

Powering Business Wo	rläwide	Maintain Non-Eato	on Catalog Numbers 👂
Manufacturer GE		<b>▼</b> 🔀	🗟 🕂 😣
Product Line LVA		- × ×	
Product ID 1234	5	▼ 💥	
Catalog Number	Description A	Unit List Price Book Mul	tiplier
z0857fh	Non Eaton Item	1200.00 1.00	

# Add Non Eaton Item to Job

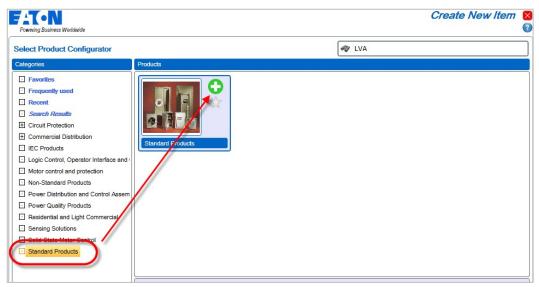
Non Eaton items can be added to an alternate using the Standard Product takeoff.

1. Click the Create icon in the Product icon group.

Powering Busin	ness Wor	ldwide					Мад	gnu	m Sı	witchgear	: T8140201X	'3K1
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Customers	•	) <b>±</b>	3		1		8N81	Am	pgard M	VC		



2. Select **Standard Products** from the item category list, and click the **Green** Plus Sign on the Standard Product TakeOff.



**3.** Non Standard Items are listed by Product Line. Click the drop down menu to find the product line the Non Eaton Item was added to, then **select** the item in the Catalog table and click **Add to List**.

**Note:** Recently added items will appear at the bottom of the list so they can be found easily.

4. Once the item has been added the Quantity can be updated. Once the quantity is correct click **Save** in the ribbon bar.

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Produ	ct ID	Qty	Cata	log Numb	er F	Product D	escription)	List Price	Ext Price	Designation		
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