



# **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](#)
- [Access Bid Manager](#)
  - [Distributors](#)
  - [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.
Iphone/Ipad	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 [My.Eaton.com](http://My.Eaton.com) and sign into MyEaton using your credentials.
3. Once you have logged into MyEaton, click the **Bid Manager** link under Quick Links.



Powering Business Worldwide

The screenshot shows the My.Eaton.com website interface. At the top, there is a blue navigation bar with a home icon and several menu items: Pricing & Availability, Order Management, Tools, Marketing Resources, and Events. Below this is a large banner area with a woman's image and text: "Welcome to My.Eaton.com" and "Unlock your My.Eaton.com potential". To the right of the banner is a "QUICK LINKS" sidebar with a red circle around the "Bid Manager" link. Other links in the sidebar include Communication Center, Component Pricing Application (CPA), Cooper Customer Center (C3), New Products, Part Number Search, Training, Vistaline On The Web (VOTW), What's New, and Support.

4. Bid Manager will automatically load.

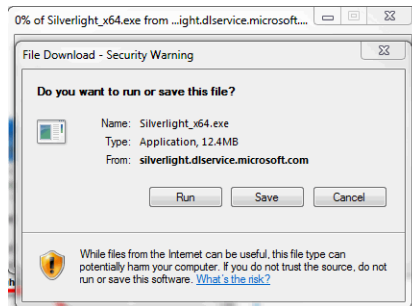
The screenshot shows the Bid Manager application interface. The top left features the Eaton logo and "Powering Business Worldwide". The top right shows "BIDMANAGER Eaton Pricing and Configuration Tool" with a home icon. The main area is divided into three columns: "Actions" with "Create Job", "Create Item", and "Create Document Package"; "Views" with "Search for Jobs", "My Jobs", "My Team's Jobs", "Shared Jobs", "Recent Jobs", and "RFQ Management"; and "Tools" with "My Account", "Document Print Queue", and "Bug Reporting". The bottom of the screen has a blue bar with "© 2012 Eaton Corporation, All Rights Reserved" on the left and "Connected to the Eaton Network" on the right.

## Step 2: Install Microsoft Silverlight

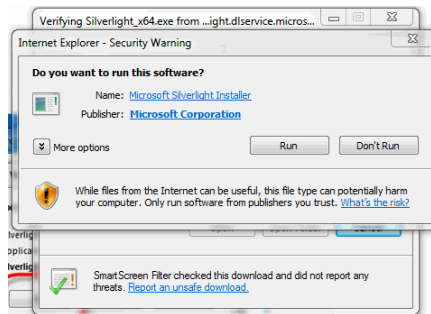
1. When Microsoft Silverlight has not been installed a web page prompting the install of Silverlight will appear. Click the **Click now to install** button to begin the install process.



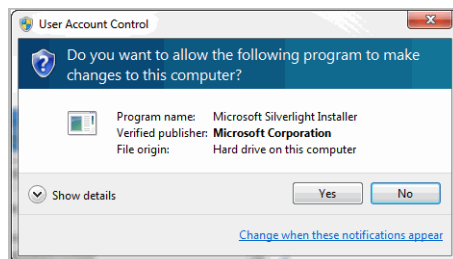
2. The File Download Security Warning will ask if the file is to be run or saved. Click **Run**.



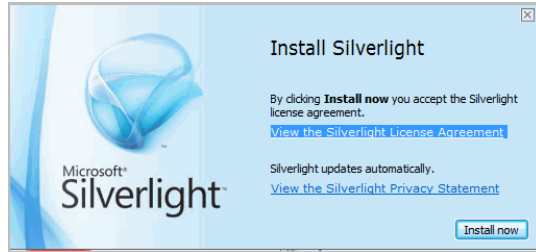
3. When the Silverlight installer has finished downloading, an Internet Explorer Security Warning will prompt you to run the install. Click **Run**.



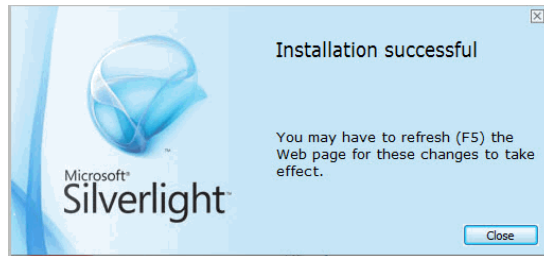
4. A Windows Vista or Windows 7 User Account Control prompt displays giving the option to install. Click **Yes**.



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



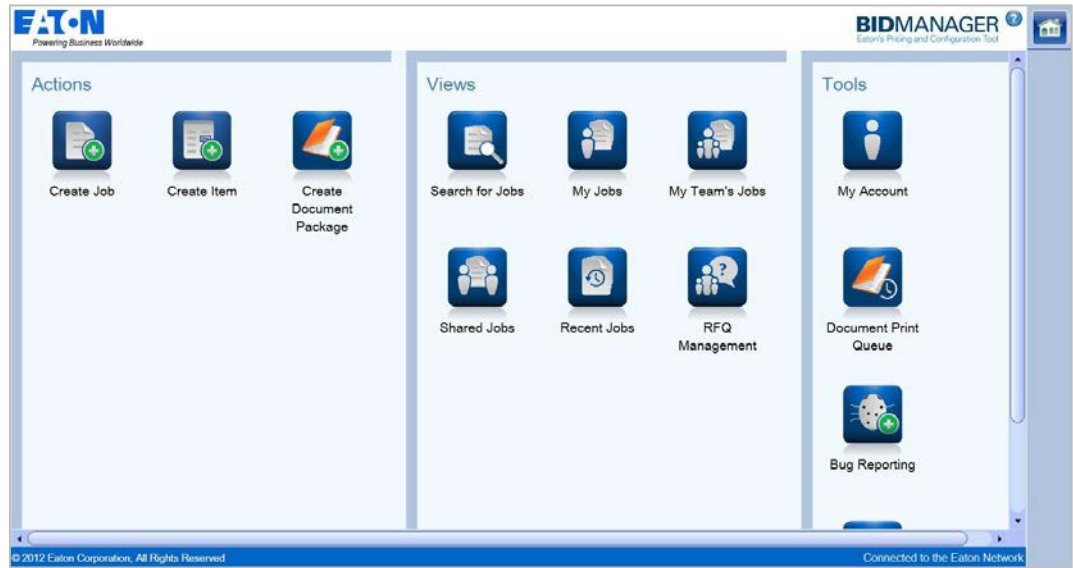
6. When the install has finished and is successful click the **Close** button.



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.

**EATON** My Account  
Powering Business Worldwide

My Information   Notifications   Job Defaults

**JERRY WARREN**

Bid Man ID T814

Office Location This will come from portal

Address Address comes from JOE Portal, JOE 55555

E-mail

Office Phone

Office Fax

Cell Phone

**Region Settings**

Currency

Language

Default Geography Filter

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

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

**EATON** *Powering Business Worldwide* **My Account**

My 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 where you are a participant such as Price Requests, Order cases you will still be notified regardless of the settings here.

**Price Requests**

I would like to be notified of Price Requests to these locations by email:

Search

Select All

- (old) LA RESIDENTIAL (old) LA RESIDENTIAL (1453-3-R)
- ALTERNATE ENERGY ALTERNATE ENERGY (1453-3-A)
- BAKERSFIELD BAKERSFIELD (1453-3-B)
- ENGINEERING SERVICES ENGINEERING SERVICES (1453-3-E)
- EOEM EOEM (1453-3-Q)

**Orders**

I would like to be notified of customer's orders by email for the following locations:

Search

Select All

- (old) LA RESIDENTIAL (old) LA RESIDENTIAL (1453-3-R)
- ALTERNATE ENERGY ALTERNATE ENERGY (1453-3-A)
- BAKERSFIELD BAKERSFIELD (1453-3-B)
- ENGINEERING SERVICES ENGINEERING 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

Save   Cancel

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

Powering Business Worldwide My Account

My 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...**

**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 Restricted** 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 users in my sales District:  
 No access  Read only  Alternate Restricted  Full access

Access level for users in my Team (cannot be more restrictive than the District Access):  
 No access  Read only  Alternate Restricted  Full access

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

Powering Business Worldwide My Account

My 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.

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**Read only** The job is visible but nothing can be changed.  
**Alternate Restricted** 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 users in my sales District:  
 No access  Read only  Alternate Restricted  Full access

Access level for users in my Team (cannot be more restrictive than the District Access):  
 No access  Read only  Alternate Restricted  Full access

# 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.

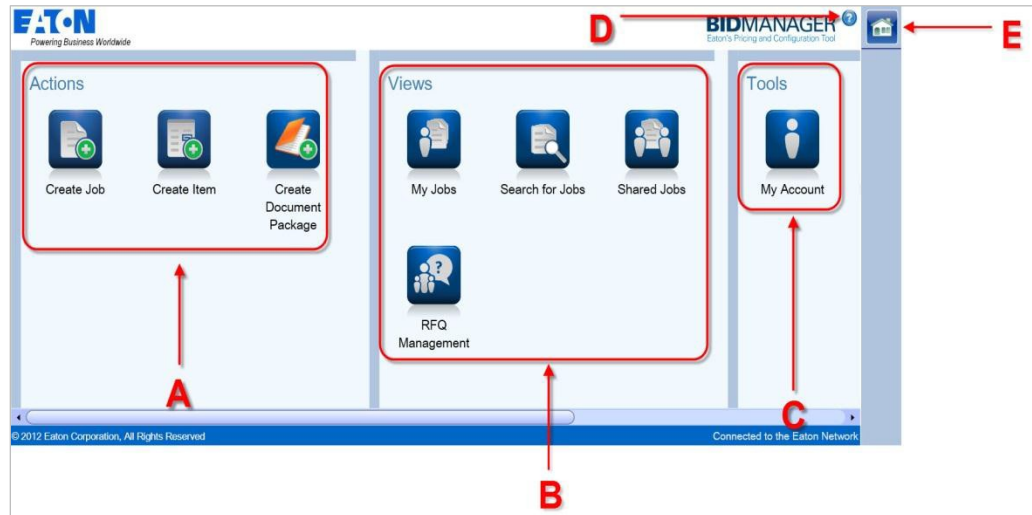
## Procedures in this Job Aid:

- [Navigate Bid Manager](#)
- [Customize Bid Manager Homepage](#)
- [Exit Bid Manager](#)

## Navigate Bid Manager

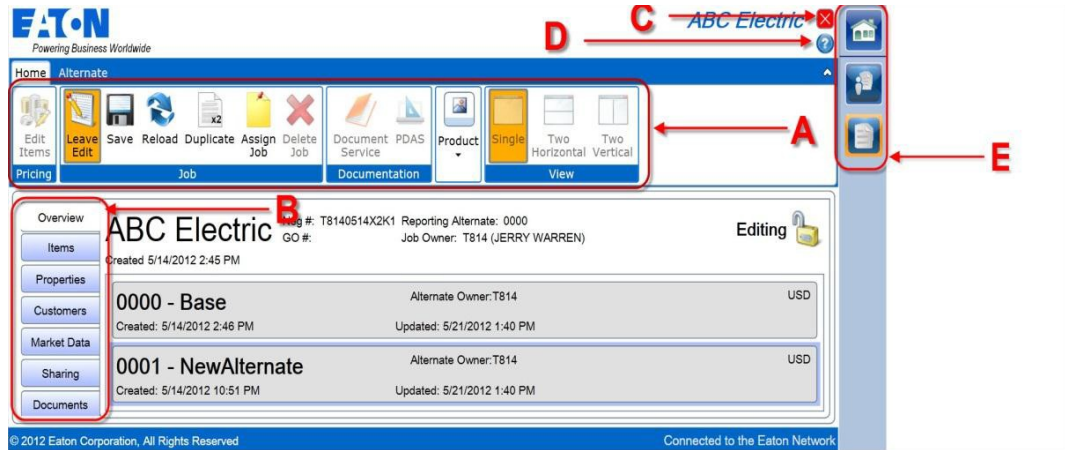
1. After logging into Bid Manager the homepage will load. The diagram below outlines the different sections of the Bid Manager Homepage.

**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.



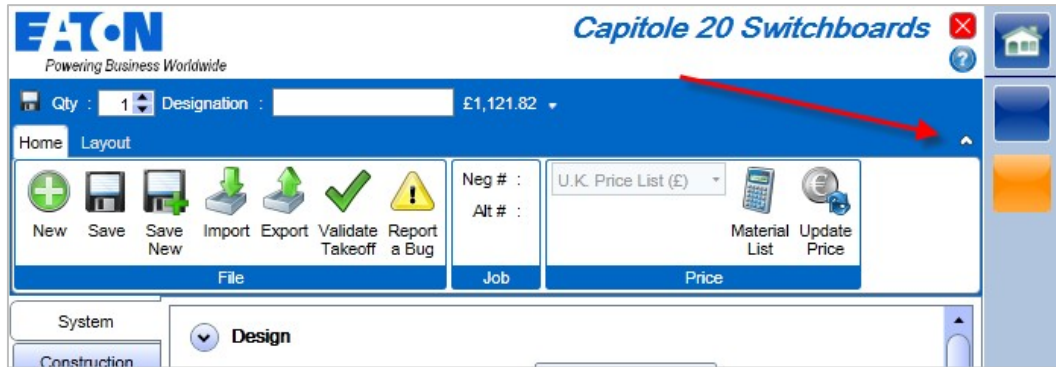
Group	Description
A	Action icons used to create jobs, items, and document packages
B	Views icons are used to find and manage jobs.
C	Tools icons are for account and Bid Manager customization
D	Question mark icon launches Bid Manager Performance Support Site
E	The right navigation pane area is used to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



Group	Description
A	Ribbon bar
B	Left Job Tabs
C	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

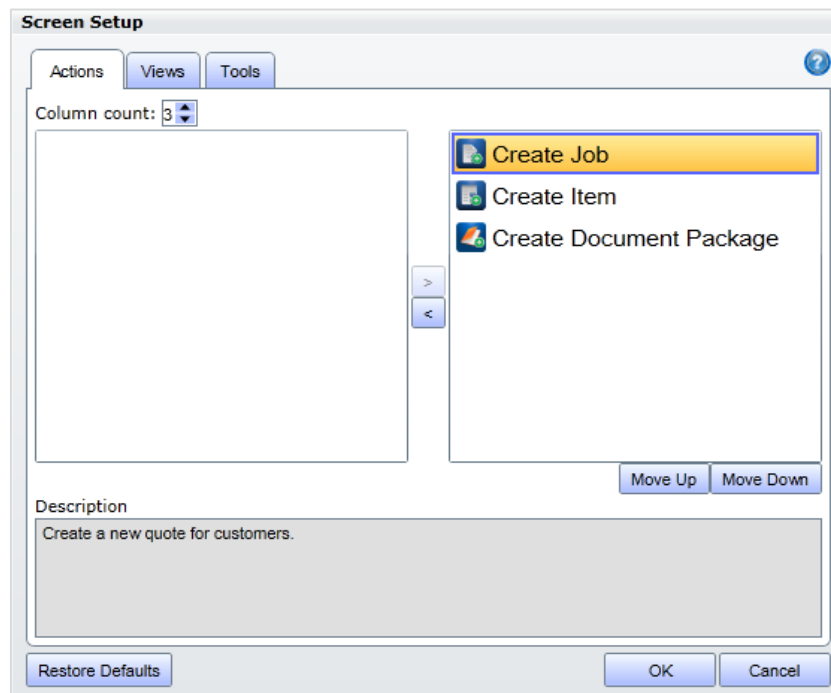
## Customize Bid Manager Homepage

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.

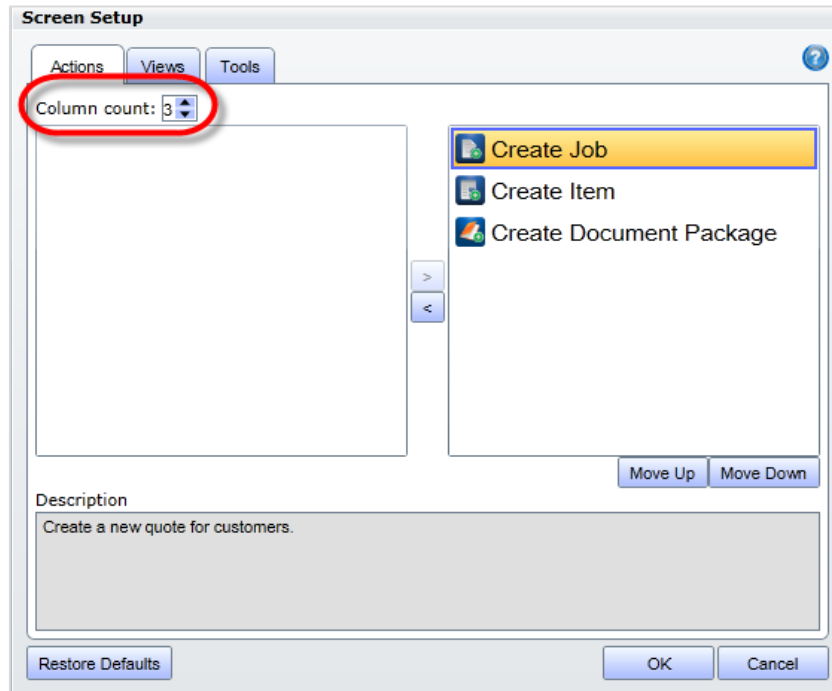


2. The Screen Setup page will appear, and the **Actions** tab opens by default. Select options on each tab to customize the homepage. The 3 sections available for setup are:



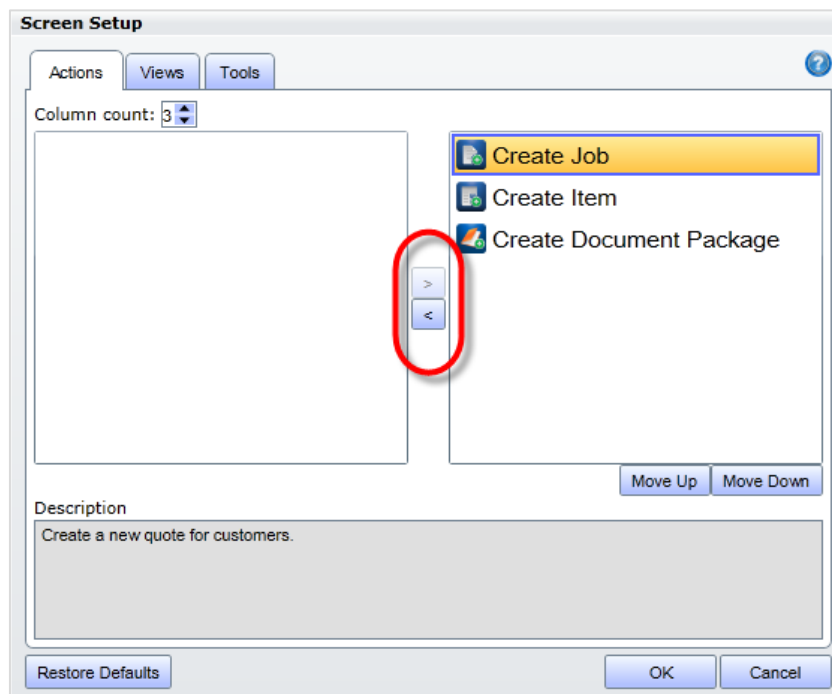
Tab	Description
Actions	Available icons are Create Document Package, Create Item, and Create job.
Views	Available icons are My Jobs, My Team's Jobs, Recent Jobs, RFQ Management, Search for Jobs, and Shared Jobs.
Tools	Available icons are My Account, Bug Reporting, View Application Log, Document Print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

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



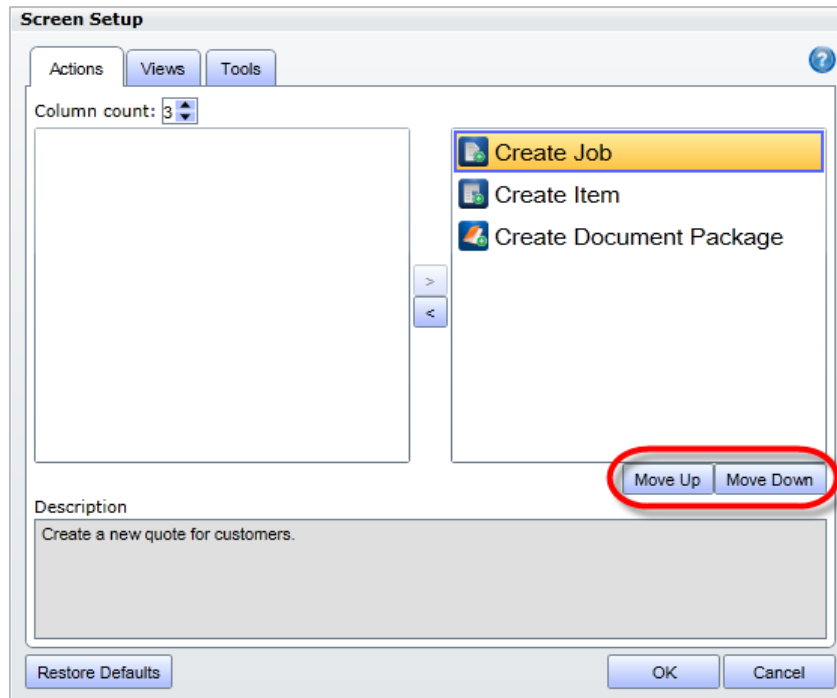
4. Add an icon or Remove icons.

- 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.

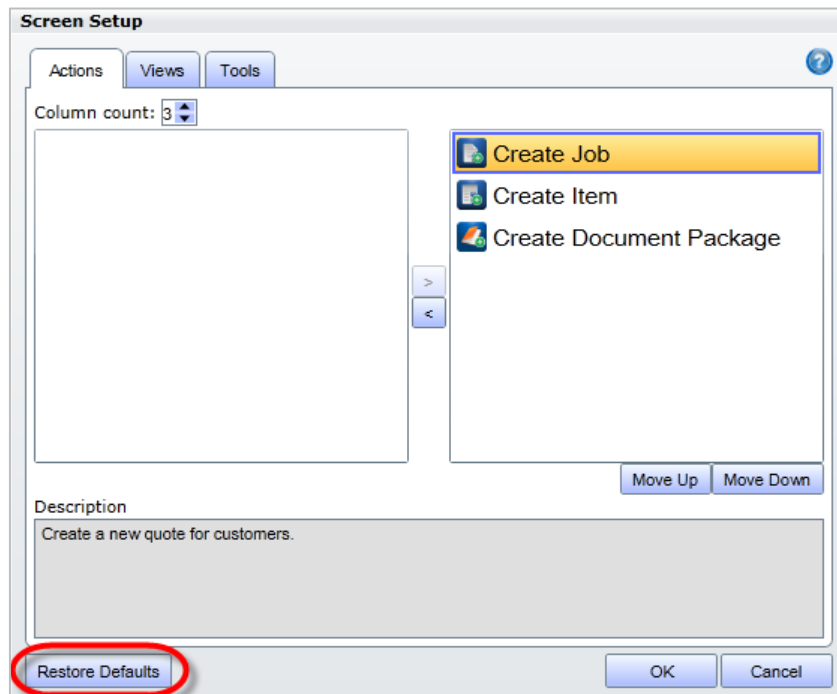




5. Select an icon in the box on the right, and click the Move up or Move Down icon to change the position of the icon on the homepage.



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



## Create a Job

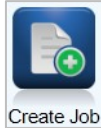
Jobs contain customer, marketing, documentation, product and pricing information for orders. Jobs also have one or more bills of material in Bid Manager. Although you can configure a product/item in Bid Manager without first creating a job, the item/product must be associated with a job to be saved.

### Procedures in this Job Aid:

- [Properties Section](#)
- [Customers Section](#)
- [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	Eaton has obtained a formal purchase order.
Lost/Abandoned	Self Explanatory

- **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.

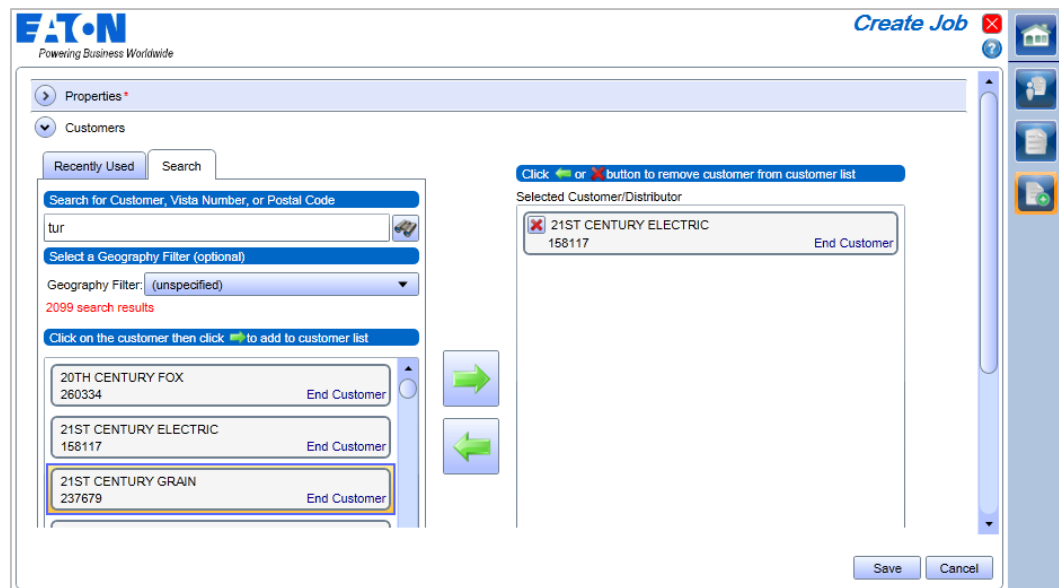
- **Bid & Purchase Date:** Bid is the date the job will be submitted to the customer, and the purchase date is the expected date of purchase.
- **Customer Request Number:** An optional number provided by the customer to track the project.
- **Job Site Location:** Provides information on the geographic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

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



## 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 next 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.



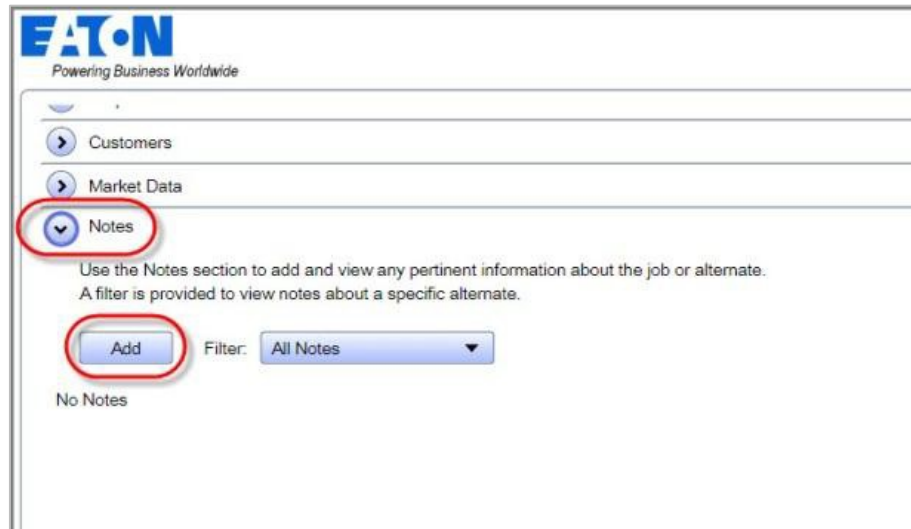
**Note:** When the customer should be added to the Vista database, navigate to the Bid Manager Performance Support site, and click the Add a Customer icon.

## Market Data Section

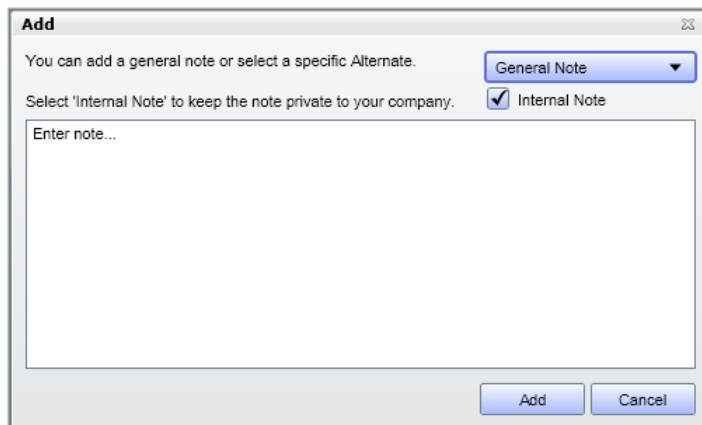
1. Click the **Market Data** arrow, and the **Market Data** section expands. Enter the following:
  - Bid Type – Identifies the type of bid on the Bill of Material
  - End Use Segment – Identifies the type of market the job is being quoted in.

## Notes Section

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



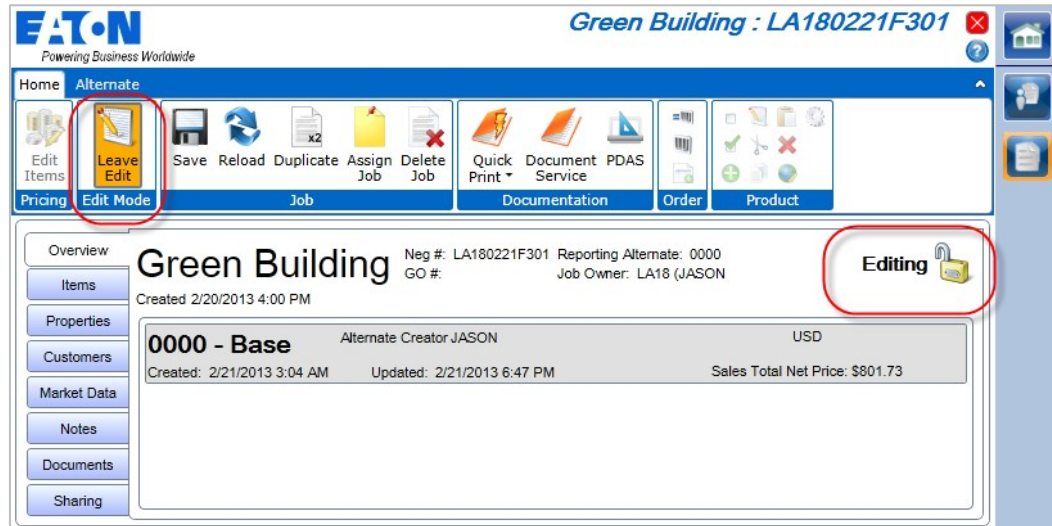
2. The **Add** pop-up appears. Click the drop down menu to add a **General** Note to the job, or select a specific **Alternate**.
3. Check the **Internal Note** box if you want the note to only share with coworkers who have access to the job within your organization. (External sharing will exclude those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



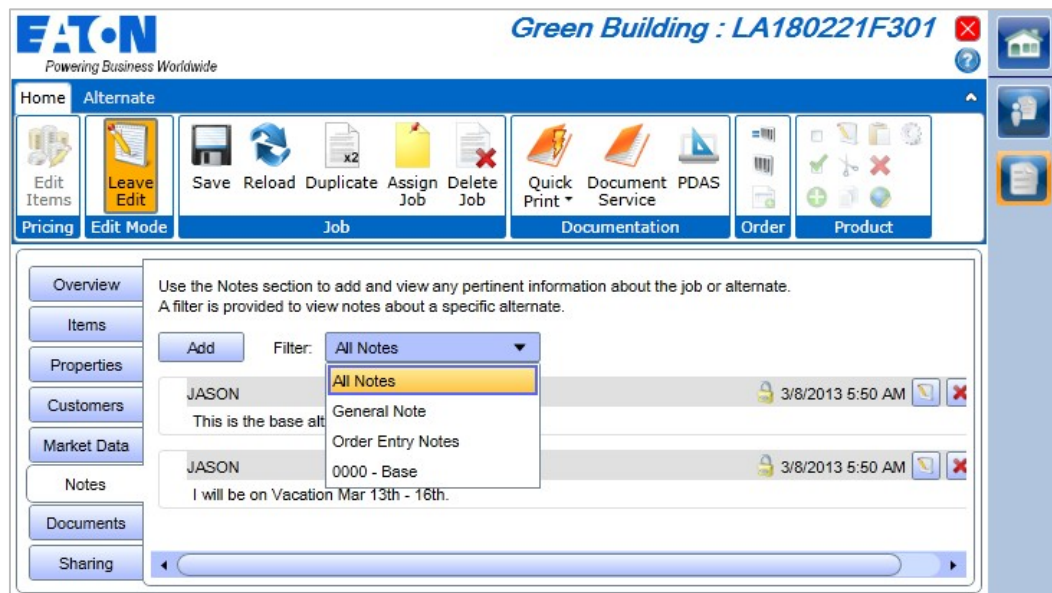
**Note:** The note appears in a table below the Add button.

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

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



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



#### 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](#)
- [Customers](#)
- [Market Data](#)
- [Sharing](#)
- [Documents](#)
- [Notes](#)

### Overview

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

The screenshot shows the Eaton Bid Manager interface. The top bar includes the Eaton logo and the job name 'ABC Electric'. Below the top bar is a navigation area with 'Home' and 'Alternate' tabs. A toolbar contains various icons for editing, such as 'Save', 'Reload', 'Duplicate', 'Assign Job', 'Delete Job', 'Document Service', 'PDAS', 'Deselect All', 'Create', 'Edit', 'Cut', 'Copy', 'Paste', 'Delete', 'Single', 'Two Horizontal', and 'Two Vertical'. The main content area is titled 'ABC Electric' and shows the following details:

- Job Name: ABC Electric
- Job #: T8140514X2K1
- Reporting Alternate: 0000
- Job Owner: T814 (JERRY WARREN)
- Created: 5/14/2012 2:45 PM
- Updated: 5/21/2012 1:40 PM

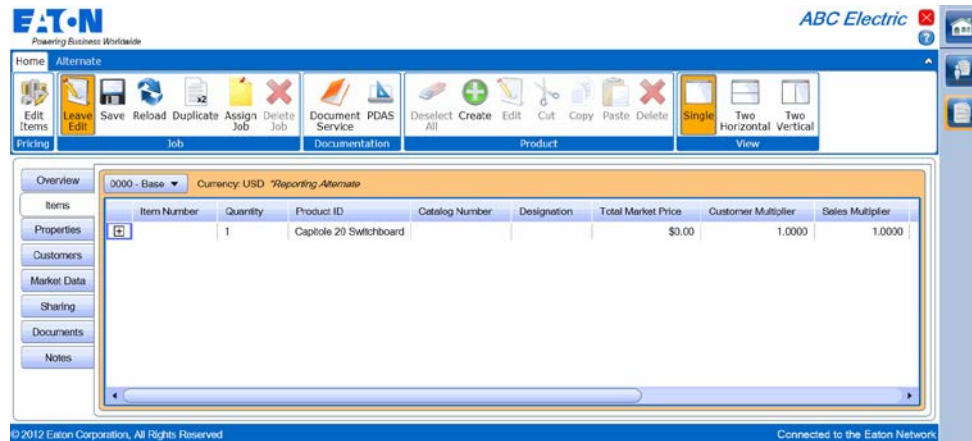
The main content area displays a list of alternates:

Alternate Name	Alternate Owner	Unit
0000 - Base	T814	USD
0001 - NewAlternate	T814	USD

The interface also includes a left sidebar with navigation tabs: Overview, Items, Properties, Customers, Market Data, Sharing, Documents, and Notes. The bottom of the screen shows the copyright notice: © 2012 Eaton Corporation, All Rights Reserved, and the status: Connected to the Eaton Network.

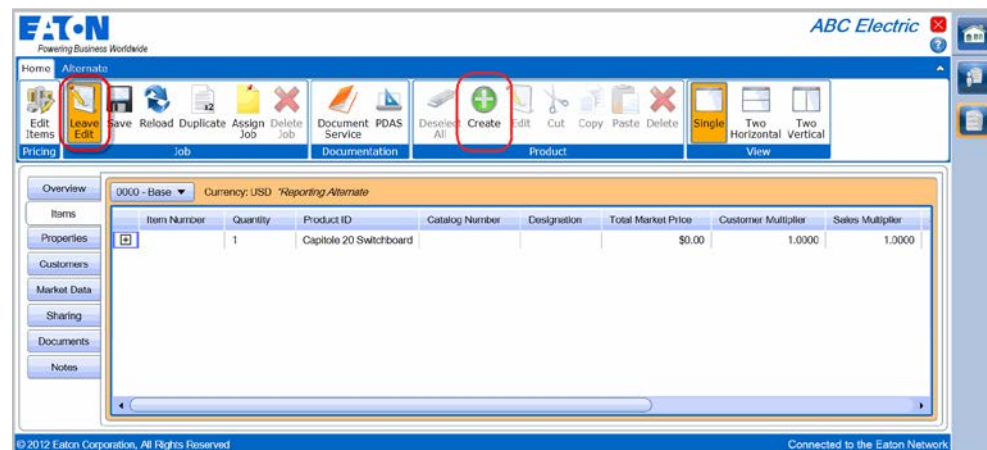
1. Use the **Alternate** top tab to create and edit alternates. When an alternate is created it may be renamed, and all information about the alternate can be edited. Refer to the **Create an Alternate** job aid.

- 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.

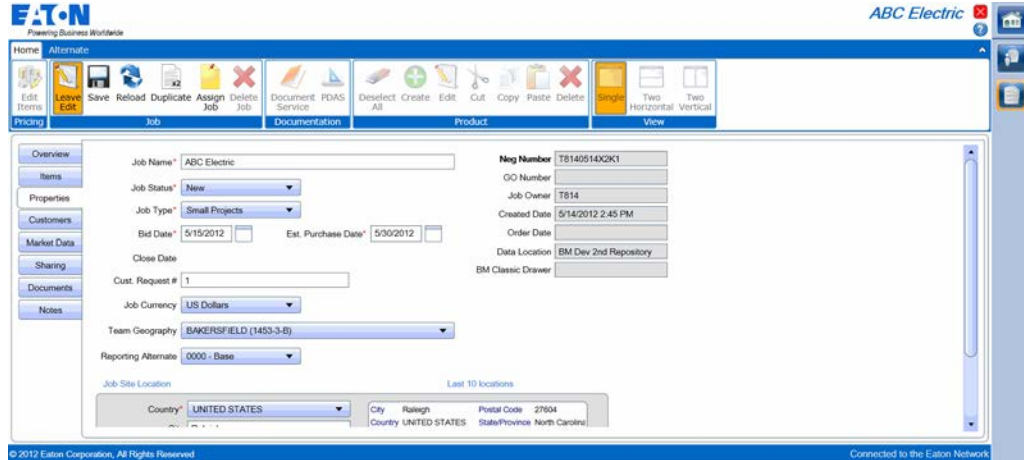


*Note: For more information refer to the **Create an Item** job aid.*



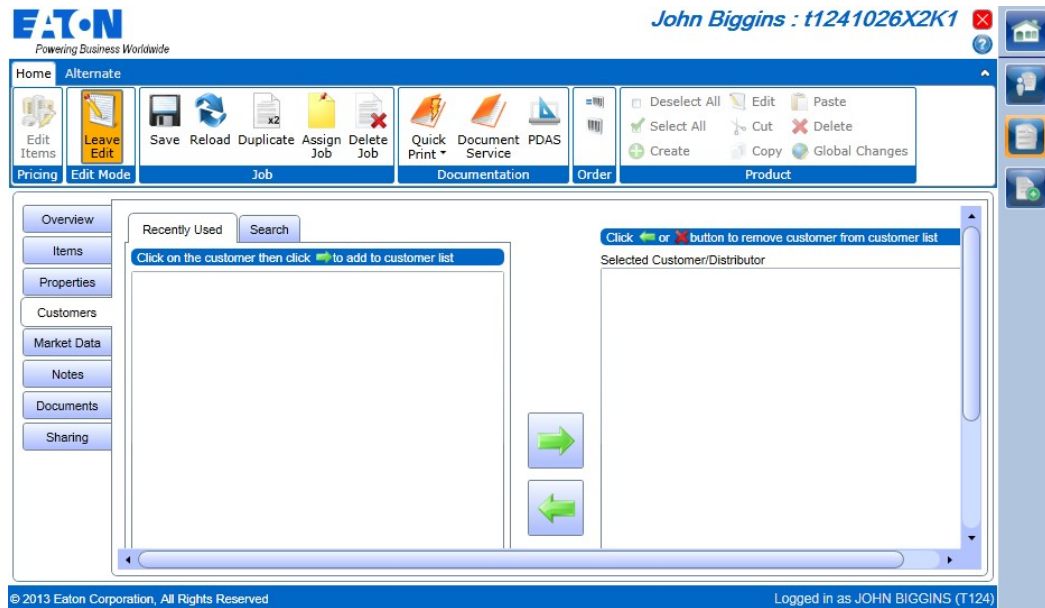
## Properties

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.



## Customers

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



**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.

## 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.

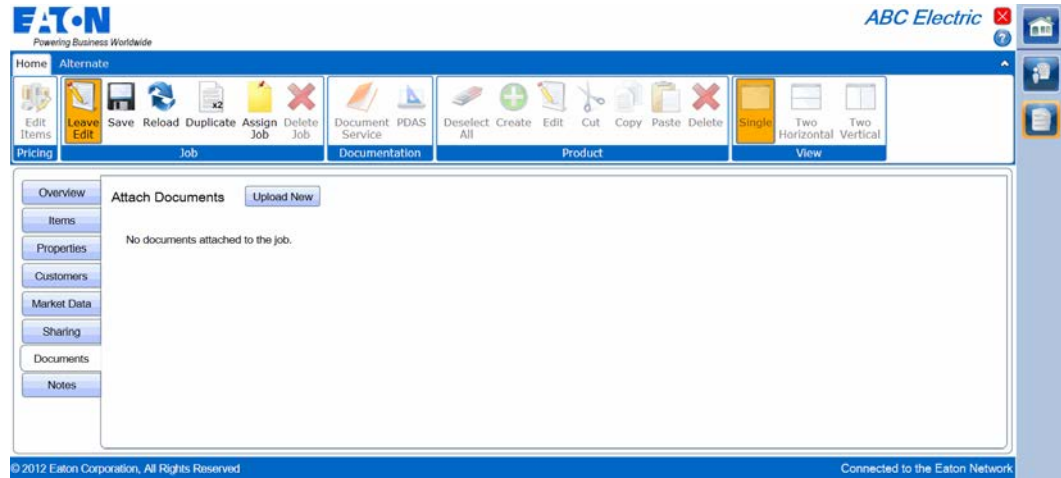
2. Edit the sharing options. Refer to **Share a Job** for more information about sharing jobs.

## Documents

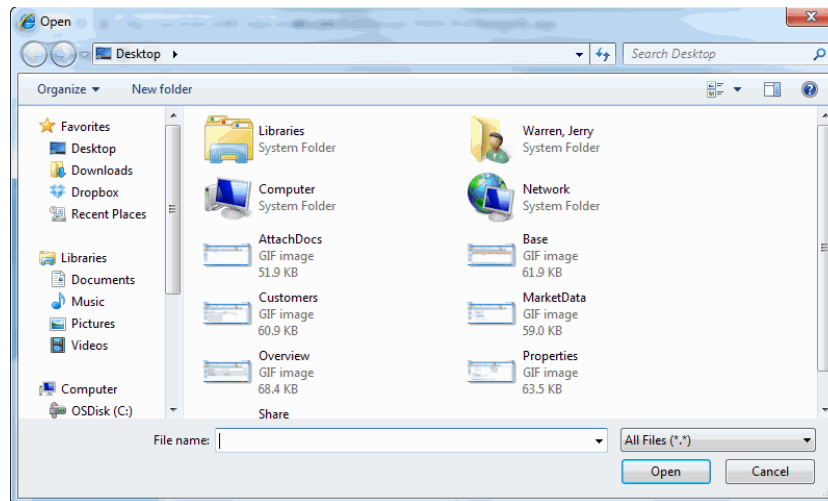
Job specifications, drawings, and other documentation can be attached and shared with internal job sharing partners. The documents will remain with the job throughout its life. The max size limit for each document/file is 50MB and 100MB per job.

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

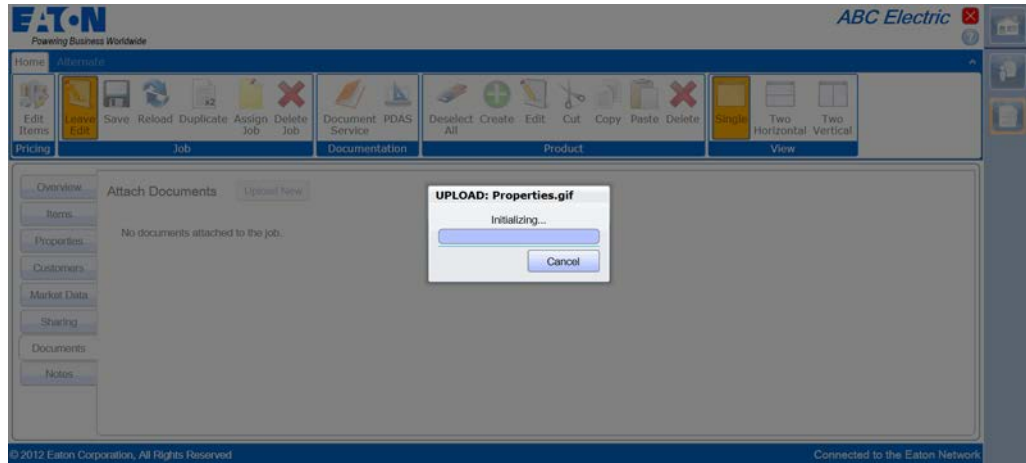
2. Click on the **Upload New** button.



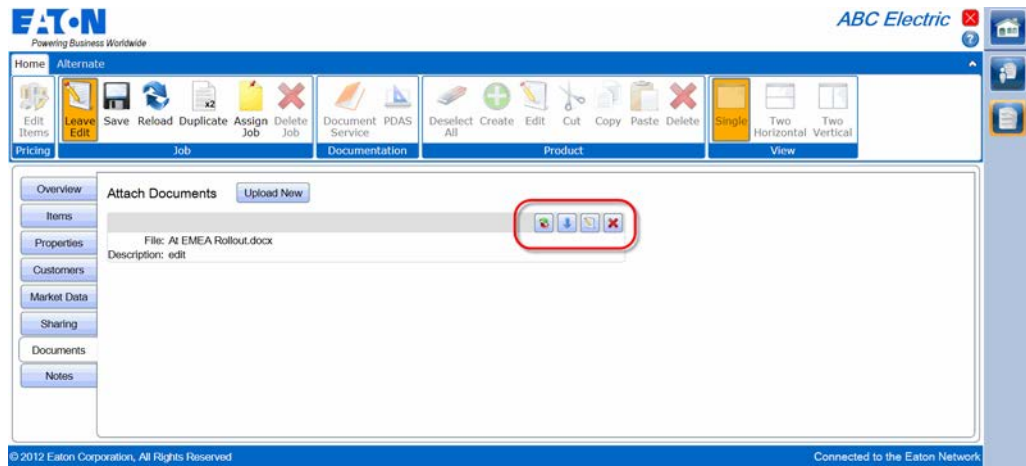
3. Browse to a file to upload, and click **Open**.



- The file will be uploaded to the job.



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

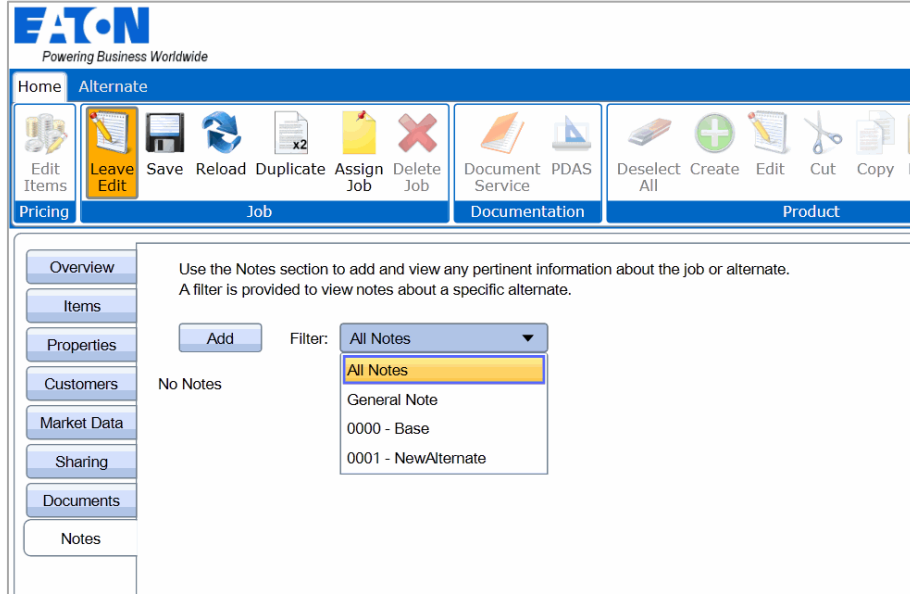


**Note:** Anyone with Full Access can modify the job.

Notes

Add a new note or edit an existing note

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



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.)



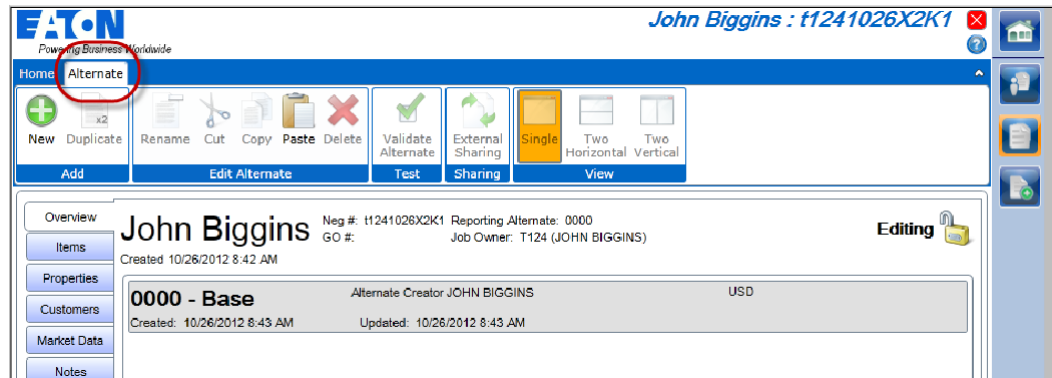
**Note:** The note appears in a table below the Add button.

5. Click **Add** to save the note.

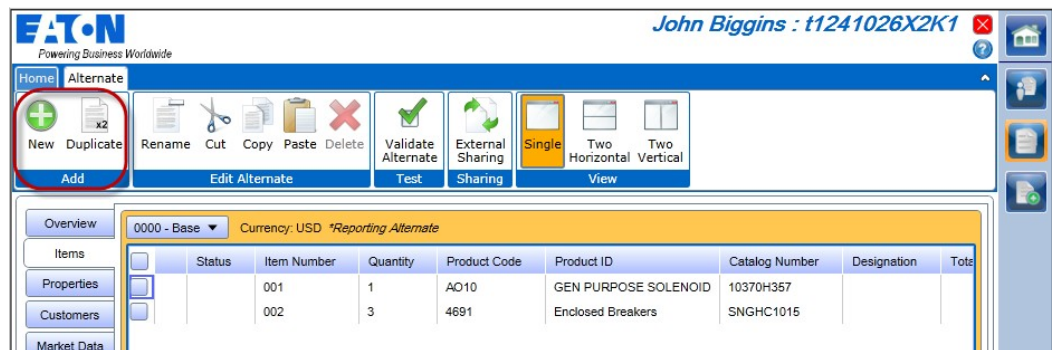
## Create an Alternate Bill of Material

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.

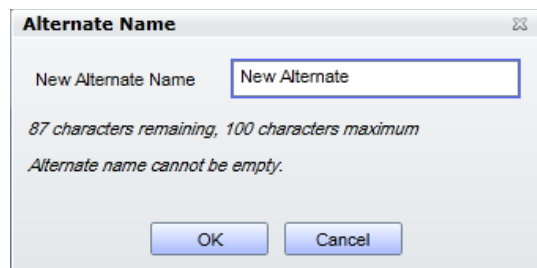
1. From the Bid Manager Home page, open an existing job or create a new job.
2. From the job screen, click the **Alternate** top tab.



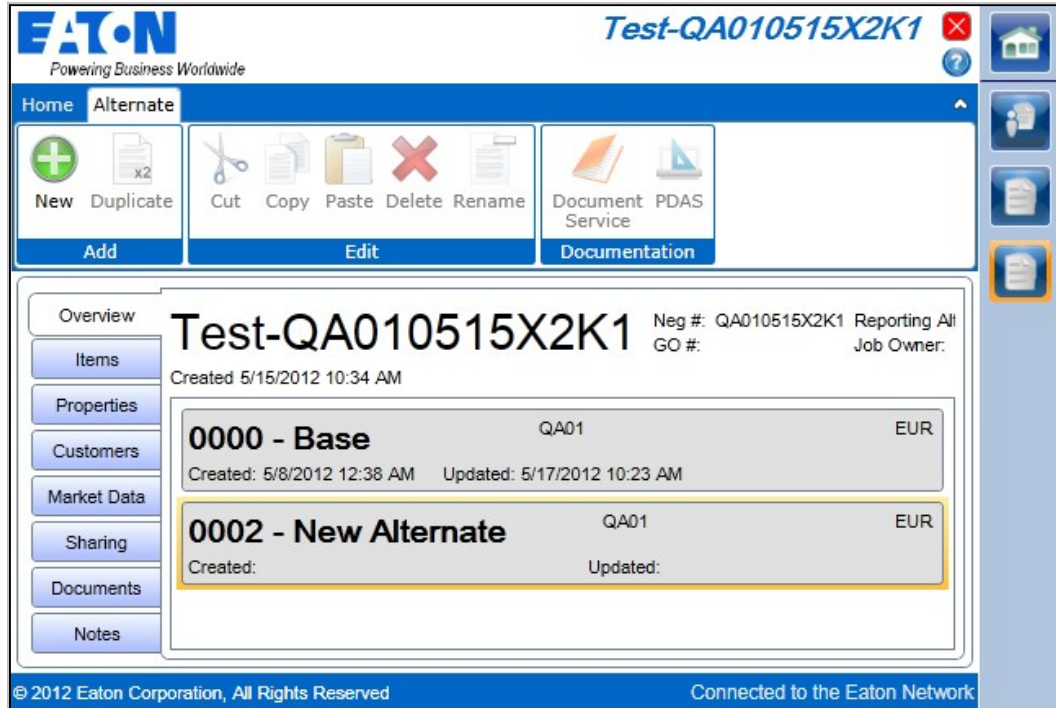
3. In the **Alternate** top tab, click **New** or **Duplicate** on the ribbon bar.



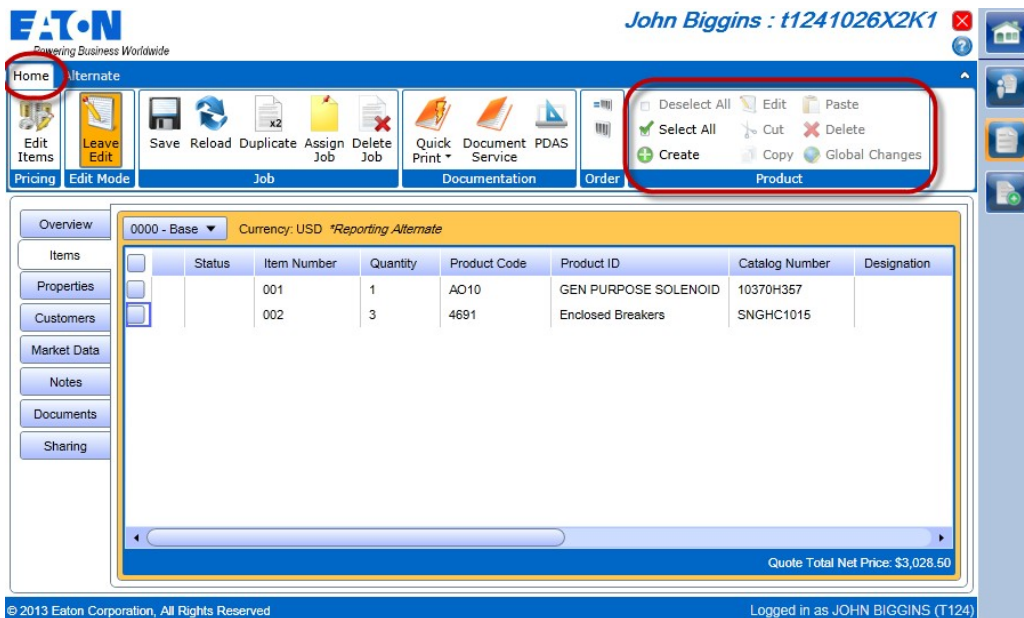
4. Name the alternate and click **OK**.



- The new alternate appears in the Overview tab.

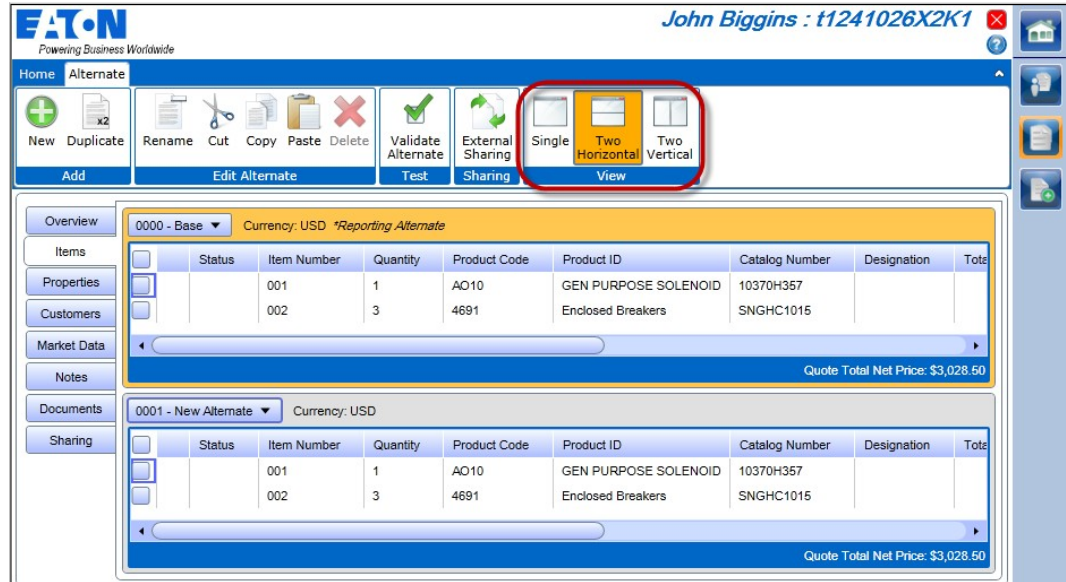


- Click on the alternate grey bar to select it. The alternate will open in the **Items** left side tab. For more information, refer to the **Create an Item** job aid.
- Click on the **Home** top tab to find the **Product** grouping in the ribbon bar. Use these buttons to begin adding and editing products/items 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.

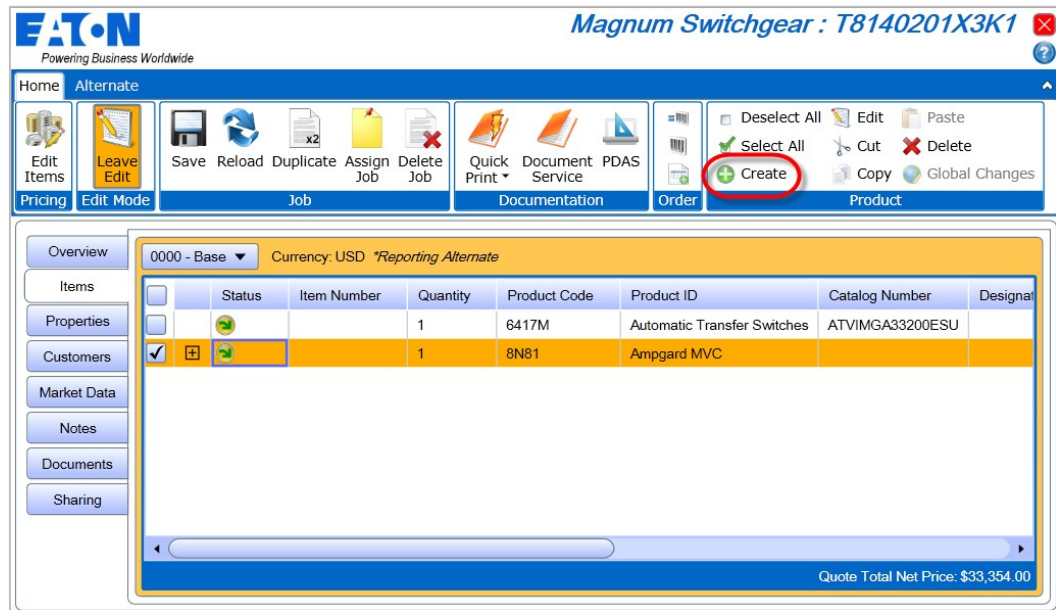
### Procedures in this Job Aid:

- [Create an Item from an Existing Job](#)
- [Creating an Item from the Home Page](#)
- [Copy an Item](#)

### Create an Item from an Existing Job

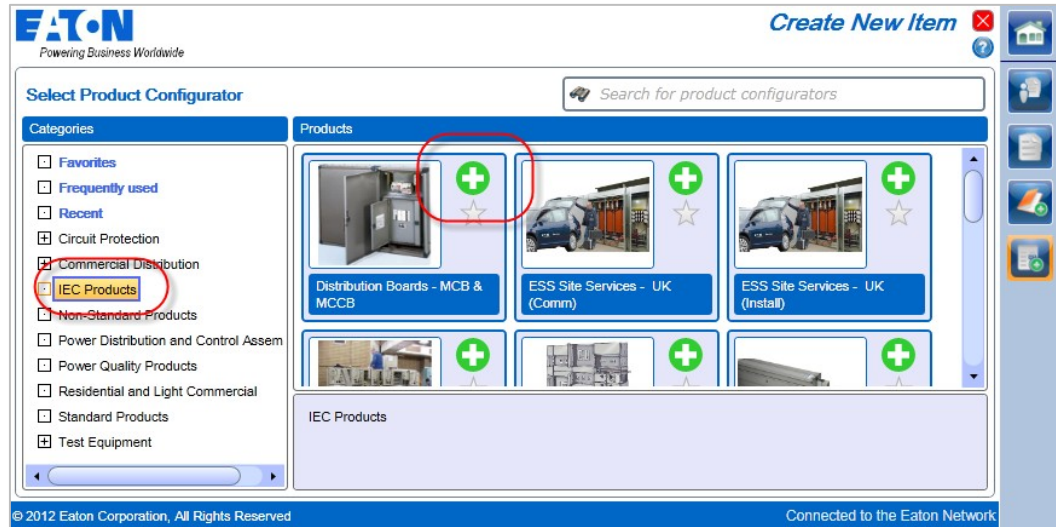
1. Login to Bid Manager.
2. Open an existing job.
3. Click **Items** in the left side tabs.
4. Click the **Create** button in the **Product** grouping.

*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.*



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.

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

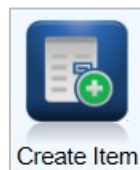
**Note:** To save multiple items without closing and re-opening the takeoff, use save new. “**Save**” will save changes over the item previously created and saved. “**Save New**” will save changes to an item as an additional item.



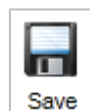
- Click the **Red X** in the upper right corner to close the takeoff and return to the job, or highlight the icon on the navigation bar and click the red X in the icon to close the takeoff.

### Create an Item from the Home Page

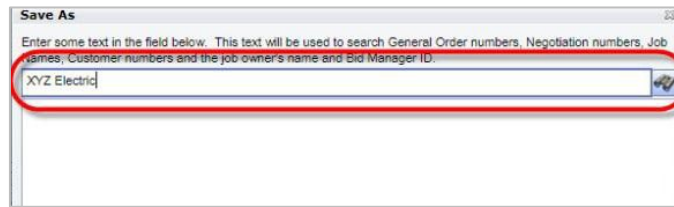
- Login to Bid Manager.
- Click the **Create Item** button.



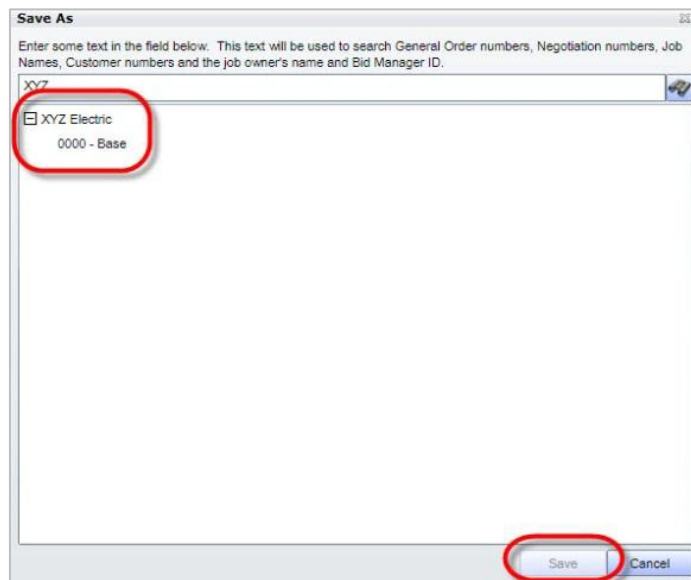
- The Create New Item page loads. Select an item **Category**, and click the green **Plus Sign** to launch the takeoff.
- Configure the item by making selections on each tab on the left side of the takeoff, and click **Save**.



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**.



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**.

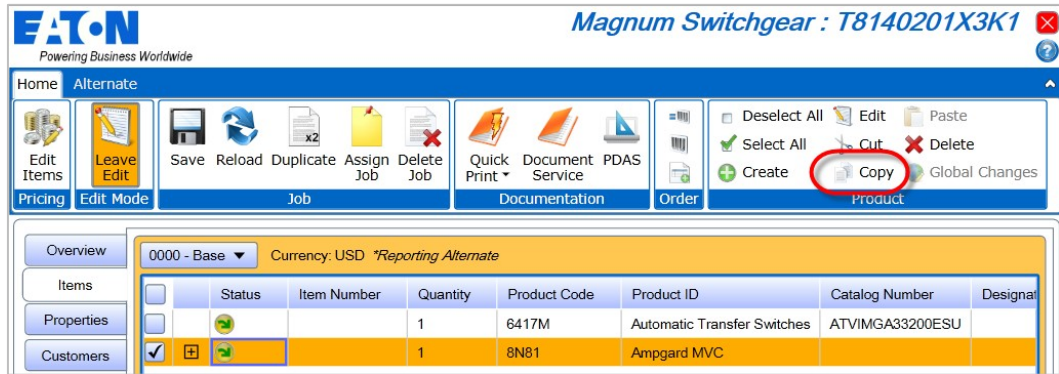


10. Click the **Red X** in the upper right corner to close the takeoff and return to the add item screen.

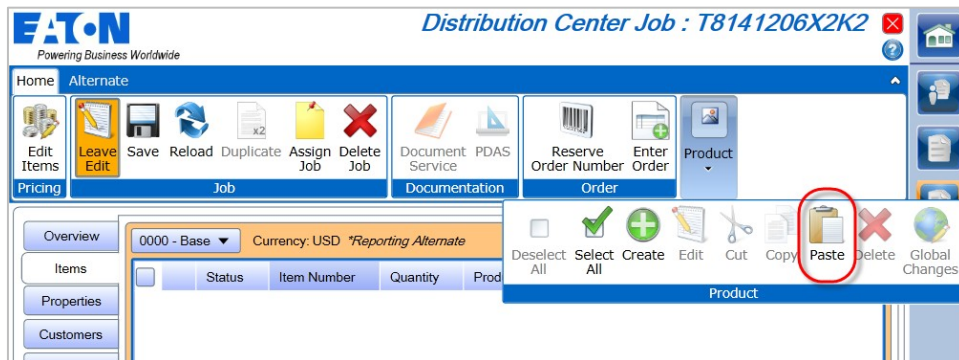
### Copy an Item

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

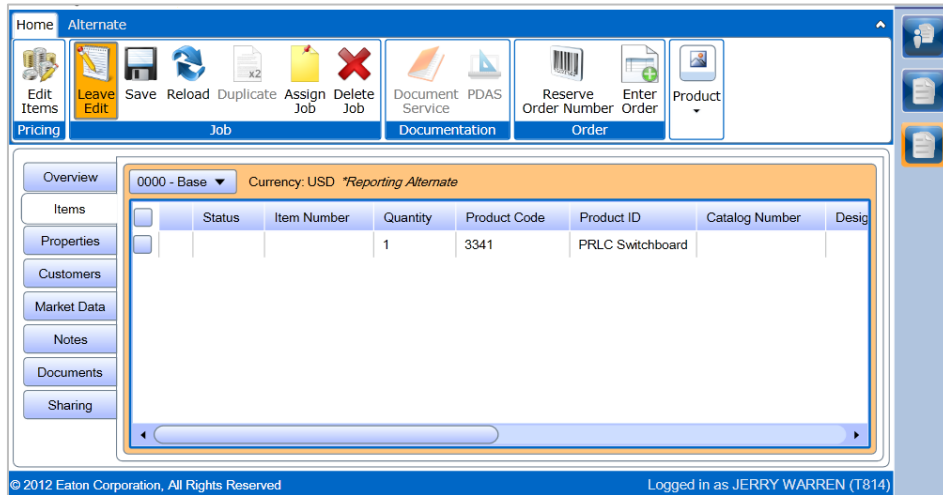
3. Select the item to be copied and click **Copy** in the Product toolbar.



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



6. The item will be copied into the alternate.



**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](#)
- [Save a Custom Search](#)

### Find a Job

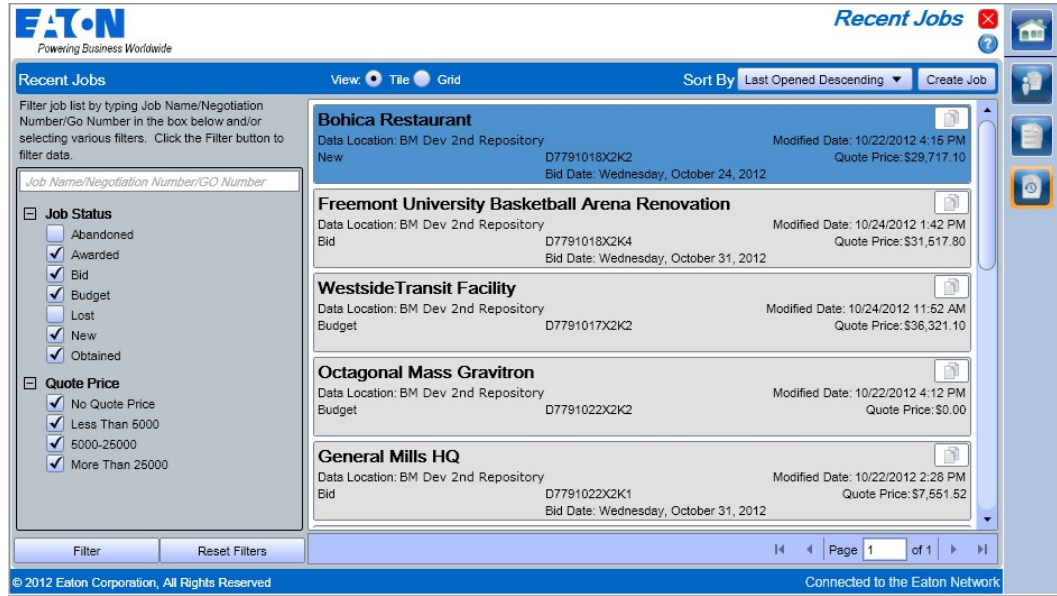
1. From the **Views** menu on the home screen, select one of the following options listed in the table below:



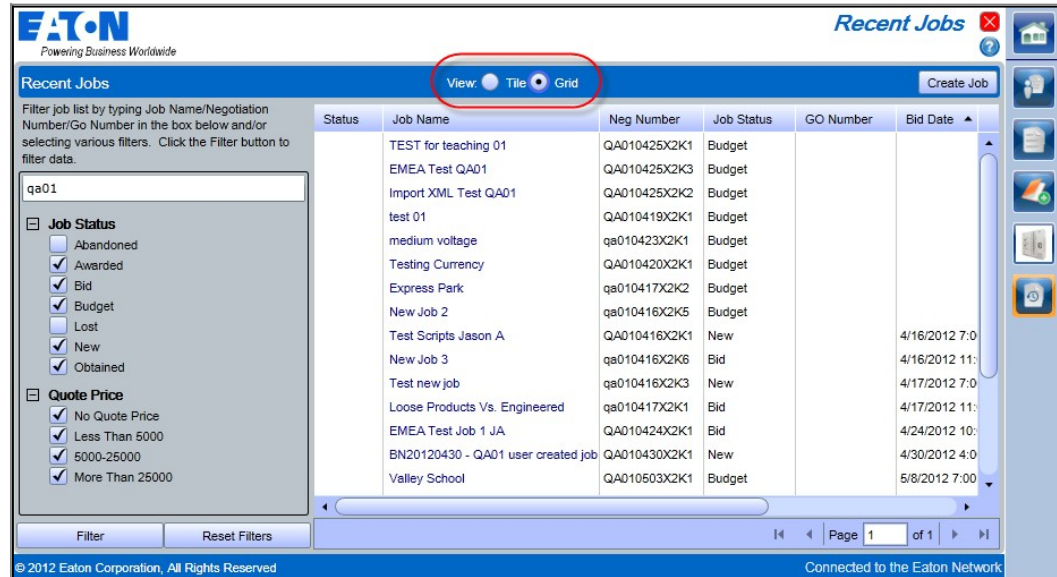
Button	Description
My Jobs	Jobs the user has created
My Team's Jobs	Jobs the user's team has created. NA Plant user's team is their product line.
Shared Jobs	My Team's jobs and any jobs that were specifically shared with the user.  <b>Note:</b> Plant users have all access to all jobs by default. Therefore, they only access jobs that were specifically shared with them in the Shared Jobs window.
Search for Jobs	Searches the all jobs available to the user.



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



- Copy job information to your clipboard using the small copy icon in the right corner of each job tile.
- 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.



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

The screenshot shows the 'My Jobs' application interface. The 'Sort By' dropdown menu is open, displaying the following options: Job Name A-Z, Job Name Z-A, Negotiation Number A-Z, Negotiation Number Z-A, GO Number A-Z, GO Number Z-A, Bid Date Descending, Bid Date Ascending, Modified Date Descending (highlighted), Modified Date Ascending, Quote Price Descending, and Quote Price Ascending. The job list on the right includes three entries: 'Arboretum' (LA180405X2K1, Bid Date: Friday, April 06, 2012), 'Arboretum' (LA180404X2K1, Bid Date: Wednesday, April 11, 2012), and 'New Job' (LA180403X2K1, Bid Date: Tuesday, April 10, 2012). The left sidebar contains filter options for Modified Date, Job Status, and Quote Price.

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

The screenshot shows the 'My Jobs' application interface with the filter options on the left highlighted by a red box. The 'Sort By' dropdown menu is set to 'Modified Date Descending'. The job list on the right includes three entries: 'Arboretum' (LA180405X2K1, Modified Date: 4/5/2012 8:15 AM), 'Arboretum' (LA180404X2K1, Modified Date: 4/4/2012 11:13 AM), and 'New Job' (LA180403X2K1, Modified Date: 4/3/2012 2:51 PM). The left sidebar contains filter options for Modified Date, Job Status, and Quote Price.

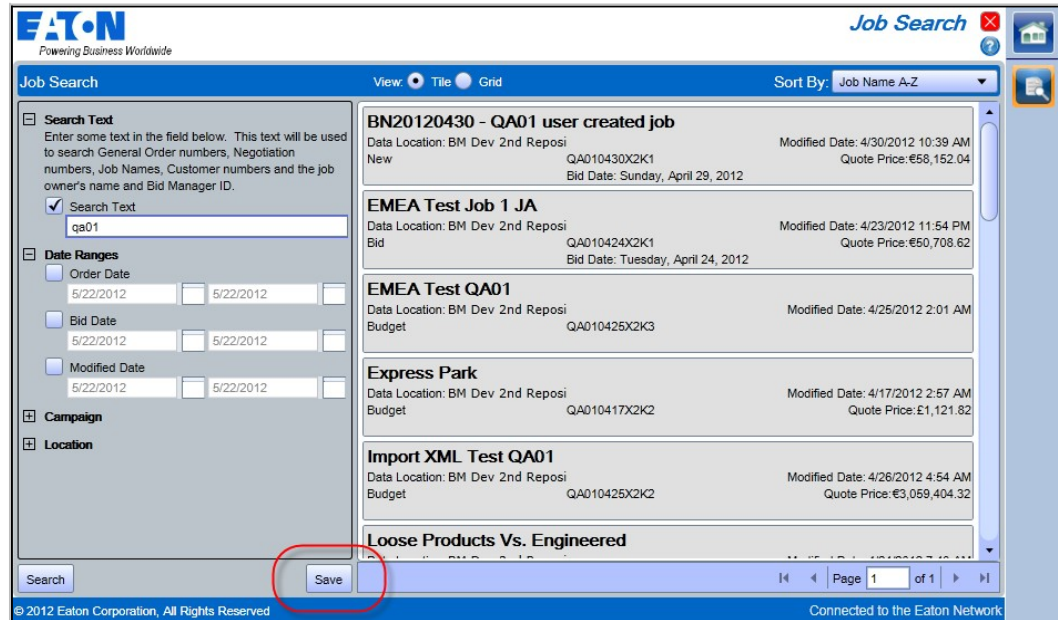


- Use the **Page** selection to see more jobs than can be displayed in the window.

- 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.

## 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



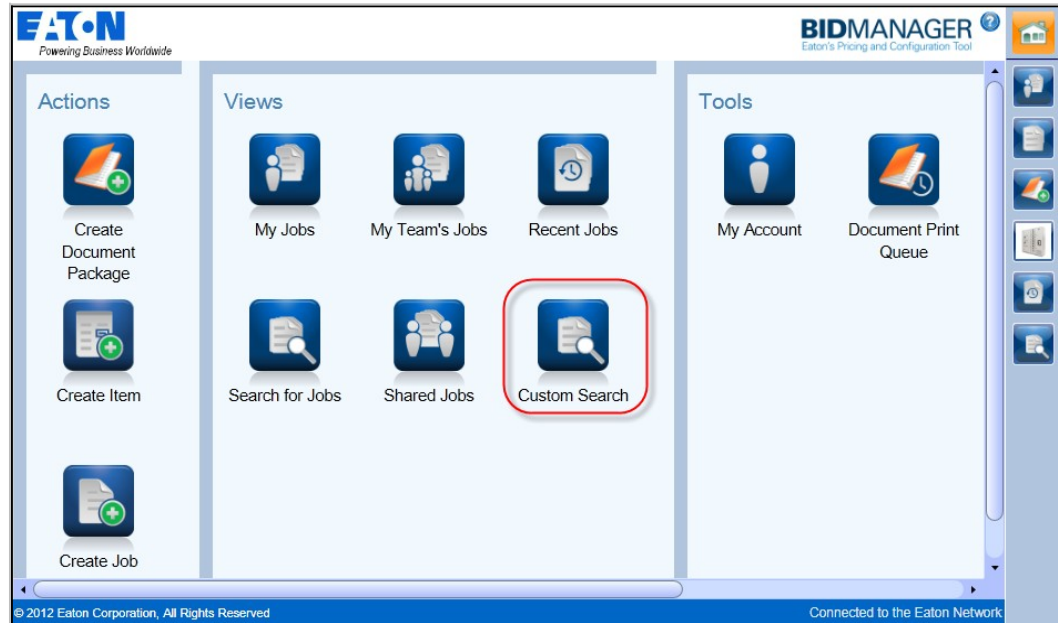
2. Type in a name and description for the custom search in the resulting pop up window, and click **Save**.

**Save Search**

Please enter a title for this custom search in the field below.

Please enter a description for this custom search in the field below.

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.

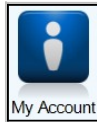
### Procedures in this Job Aid:

- [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**.

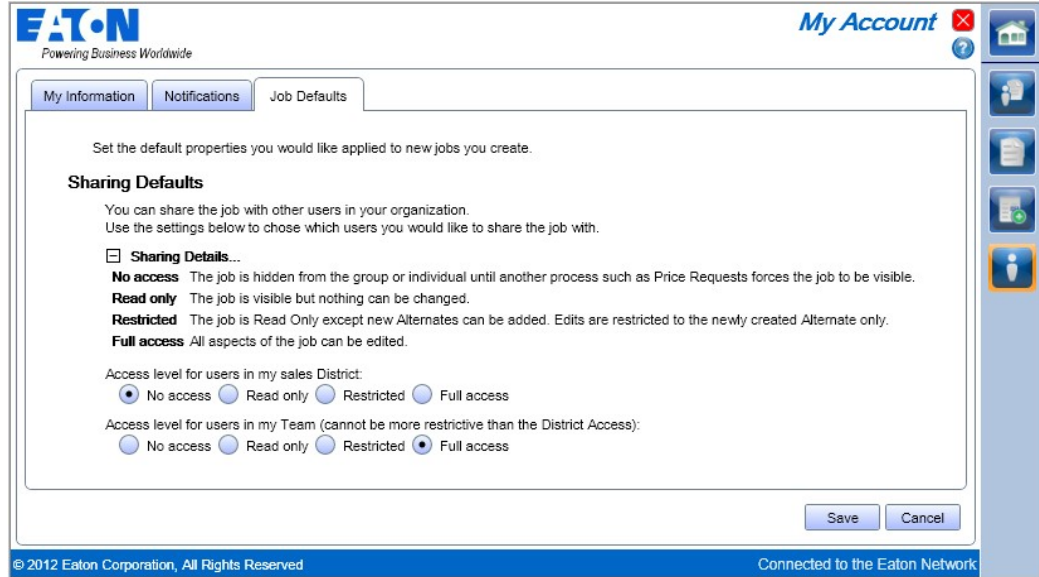


2. Click the **Job Defaults** tab and select the default sharing options. The Sharing Details section explains each category of sharing.

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.

- 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.

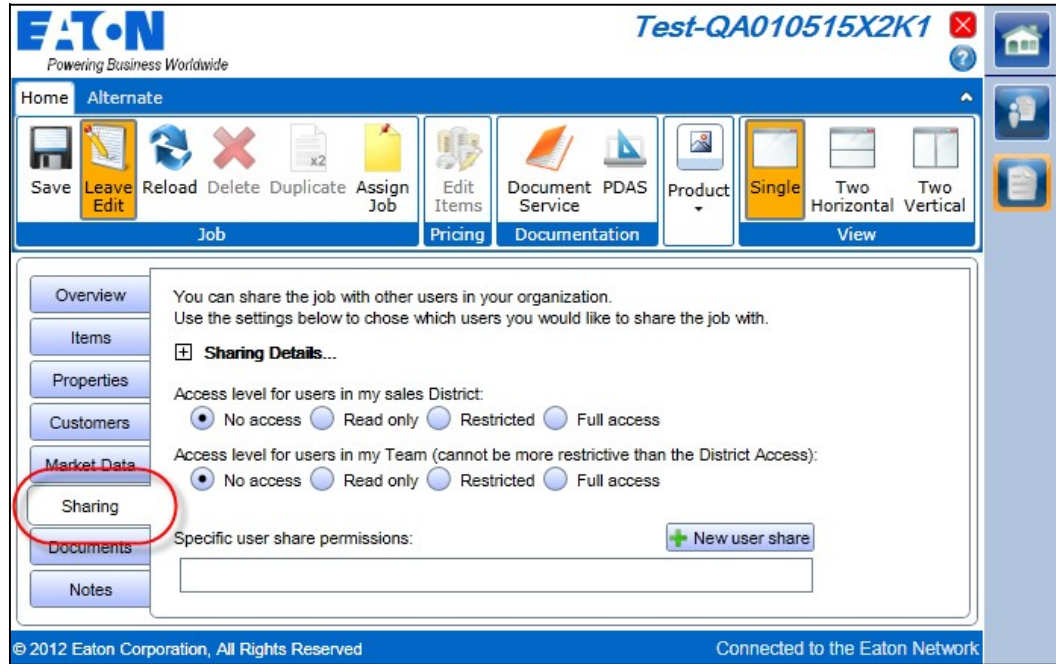


User Type	Description
US Sales User	May set default sharing options for their District and Team (sales office).
Distributors/Customers	May set default sharing options for their Company and Branch.
Plant Users	May set default sharing options for their Product Line.

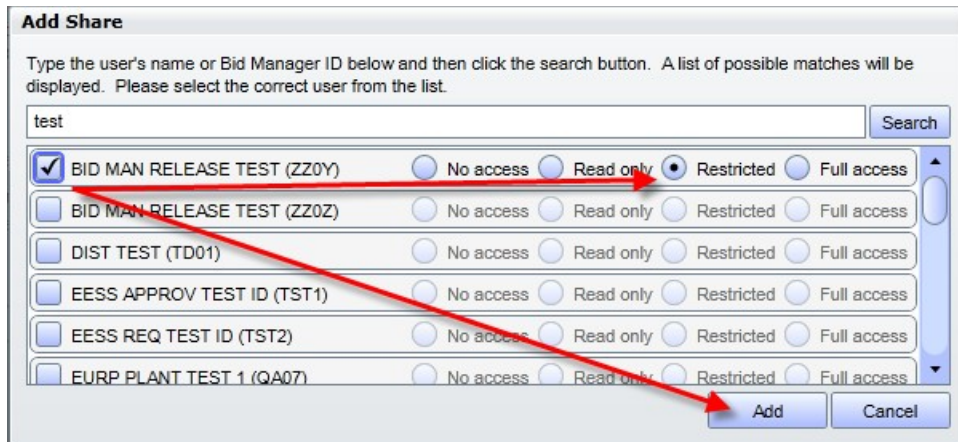
## Share a Job with Coworkers in your Organization

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

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



- Default sharing levels are shown and can be changed.
- 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.



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

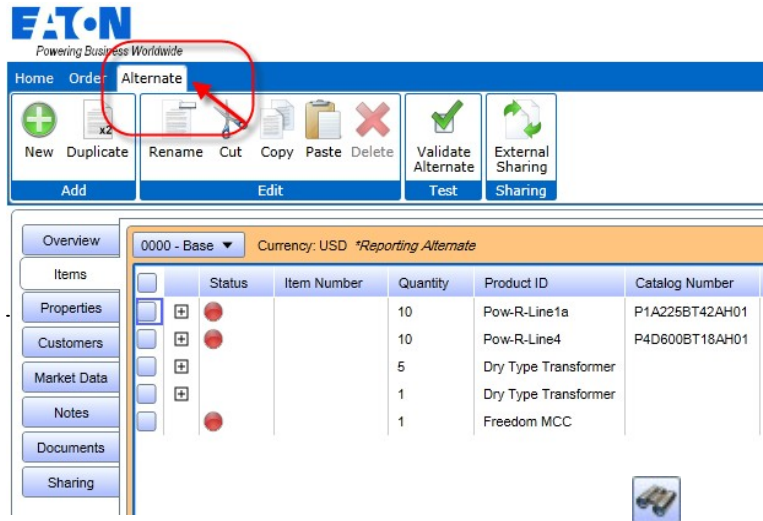
**Note:** If a user has a default setting of "Full Access," for their entire team, but then specifies a member of their team as "No Access", that team member will NOT be able to see the job in Team view, share view or search view. Individually shared jobs take top precedence, followed by team, then district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

- Save** the job. Sharing is not activated until the job is saved.

## External Sharing

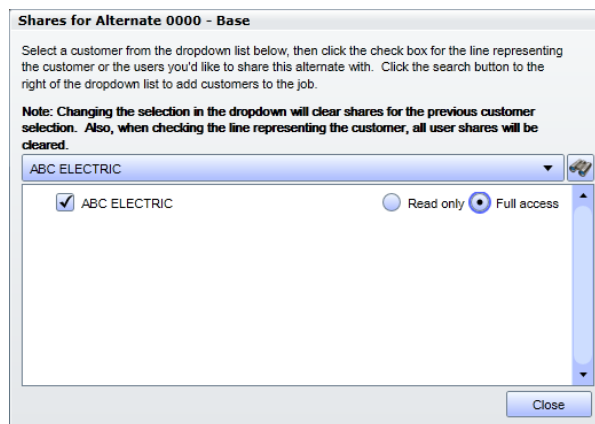
Share an alternate with someone outside of your company by using External Sharing. External Sharing operates at the alternate level. The Customers and Documents left side tab WILL NOT be shared to external users. Notes are optionally shared.

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



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.



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).

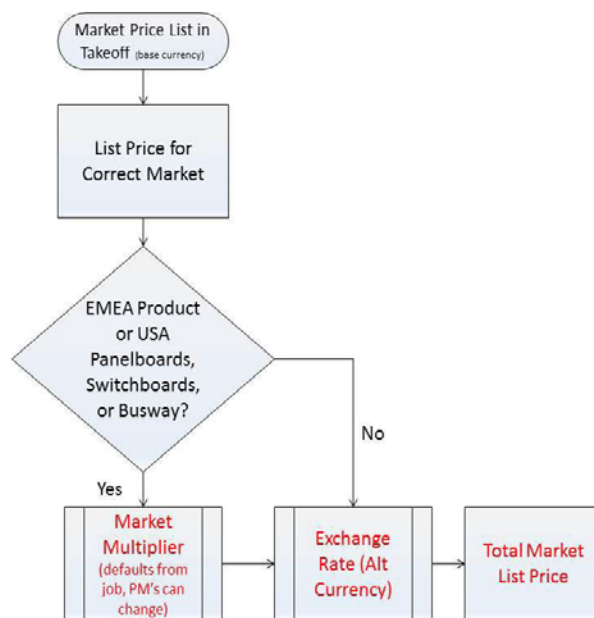


Figure 1: Bid Manager Pricing



## 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**.

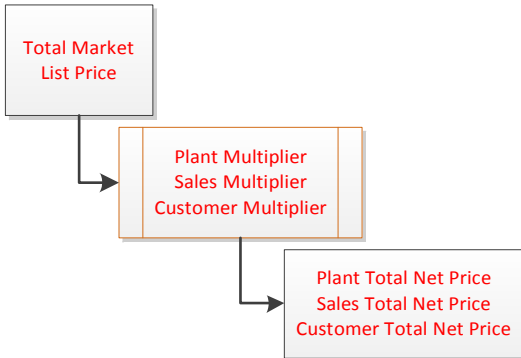


Figure 2: Bid Manager Pricing

## Quote Multiplier

Users have the option of applying an additional multiplier called the **Quote Multiplier**. The **Quote Multiplier** INCREASES the price (Quote Multipliers must be 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

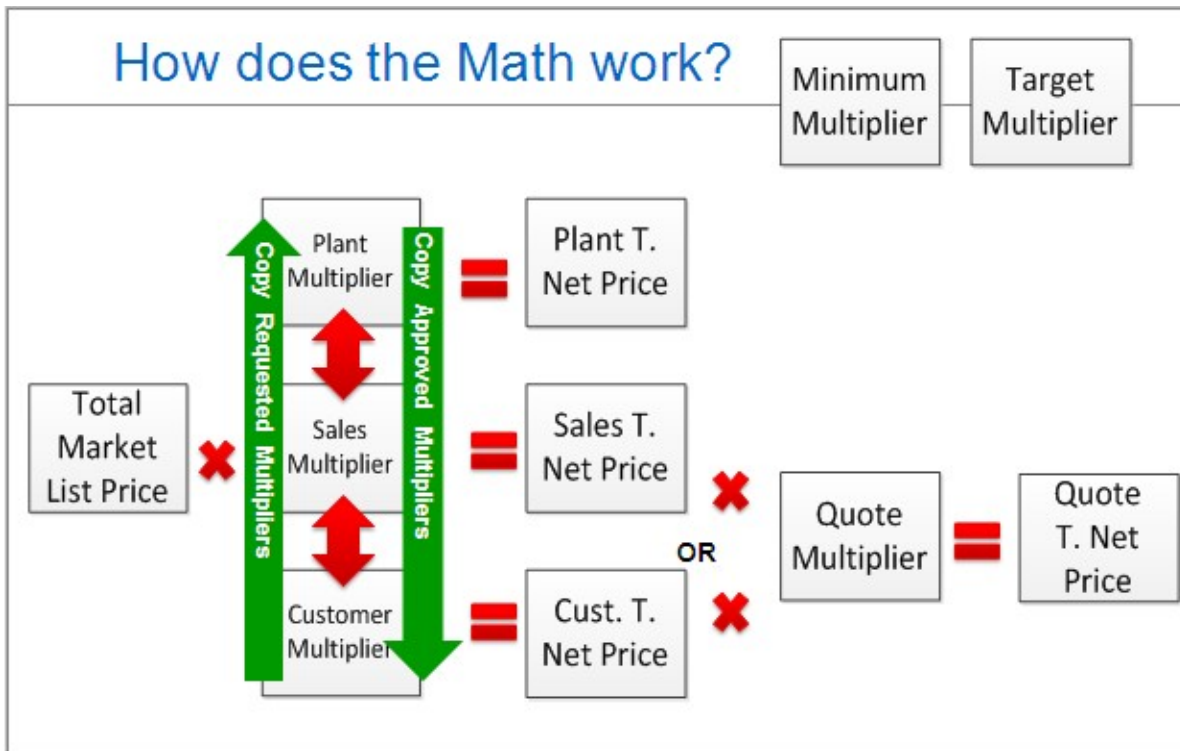
During the pricing approval process, plant, sales, and customers negotiate for the correct multiplier to use to calculate the customer's final price (Quote Total Net Price). The hierarchy is Plant → Sales → Customers, with Plant users being at the top of the hierarchy. If a multiplier value falls outside 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* may 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.

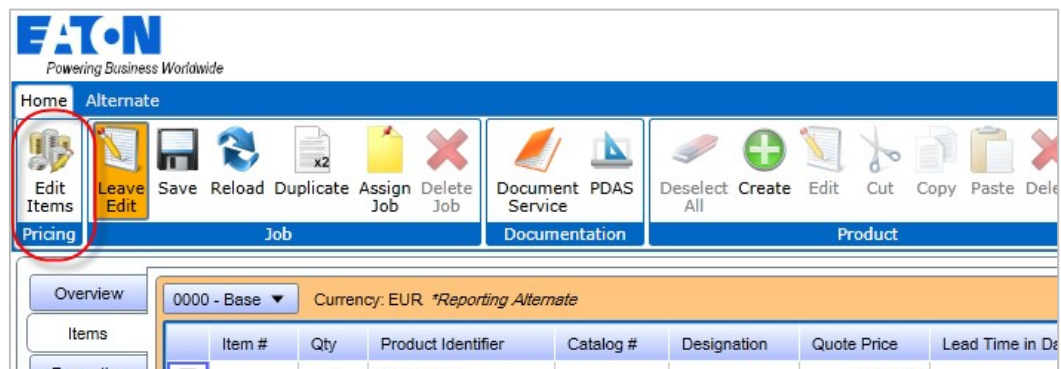
The first price shown in Edit Items is the Total Market List Price. They are manually adjusted (depending on the user type) by the **Plant, Sales, and Customer Multiplier** to become the **Plant, Sales, and Customer Total Net Price**. End user prices are then adjusted using the **Quote Multiplier**.

### Procedures in this Job Aid:

- [Access the Edit Items Screen](#)
- [Change Views and Columns in Edit Items](#)
- [Change Currency in Edit Items](#)
- [Assign Item Numbers](#)
- [Apply Multipliers \(depending on user type\)](#)
- [Copy Pricing to a Spreadsheet](#)
- [Lock in Pricing](#)
- [Leave Edit Items](#)

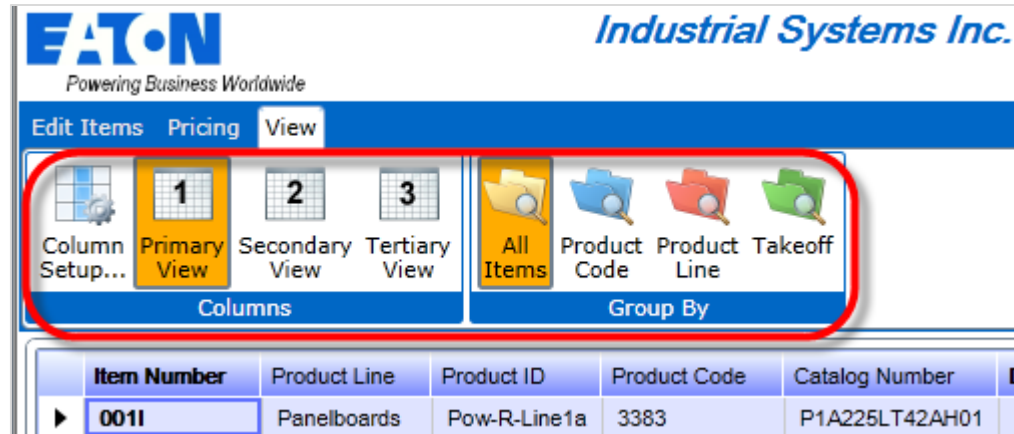
### Access the Edit Items Screen

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



## 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.



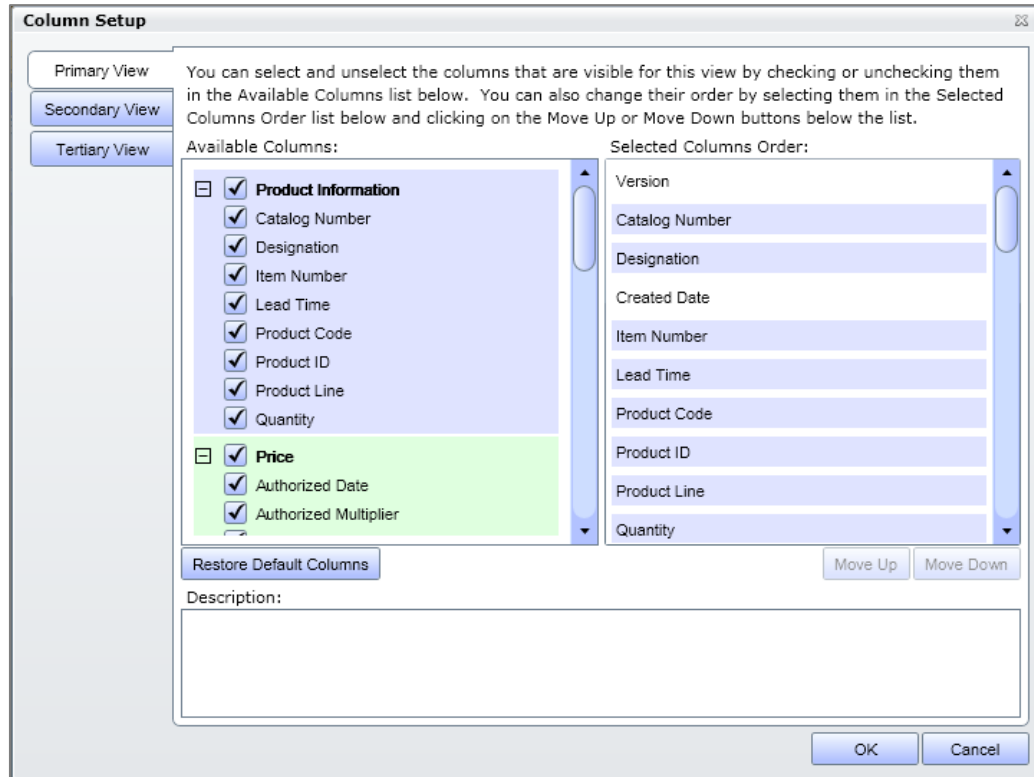
### Change the Column Setup

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.
- d. 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.

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

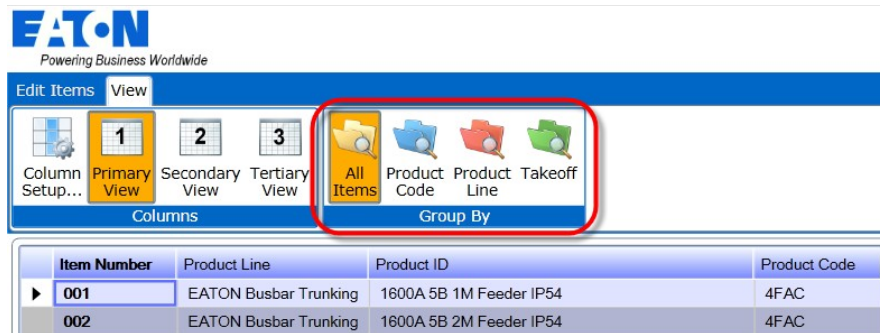


**Note:** Once in the edit items screen further adjustments can be made by dragging and dropping columns to in the desired order from left to right.

### 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.



## Assign Item Numbers

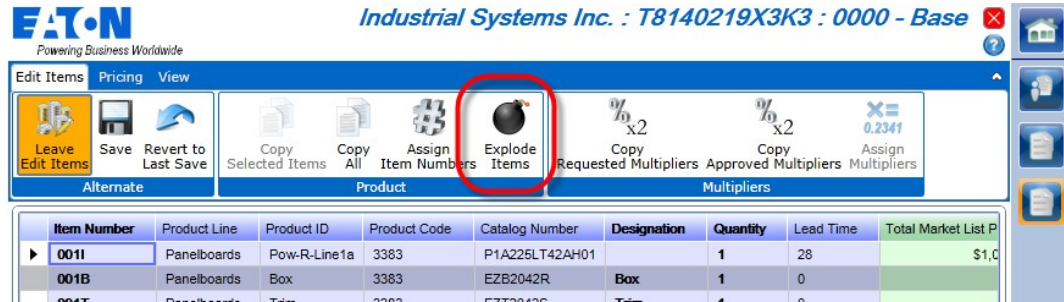
A complete bill of material must have item numbers.

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.



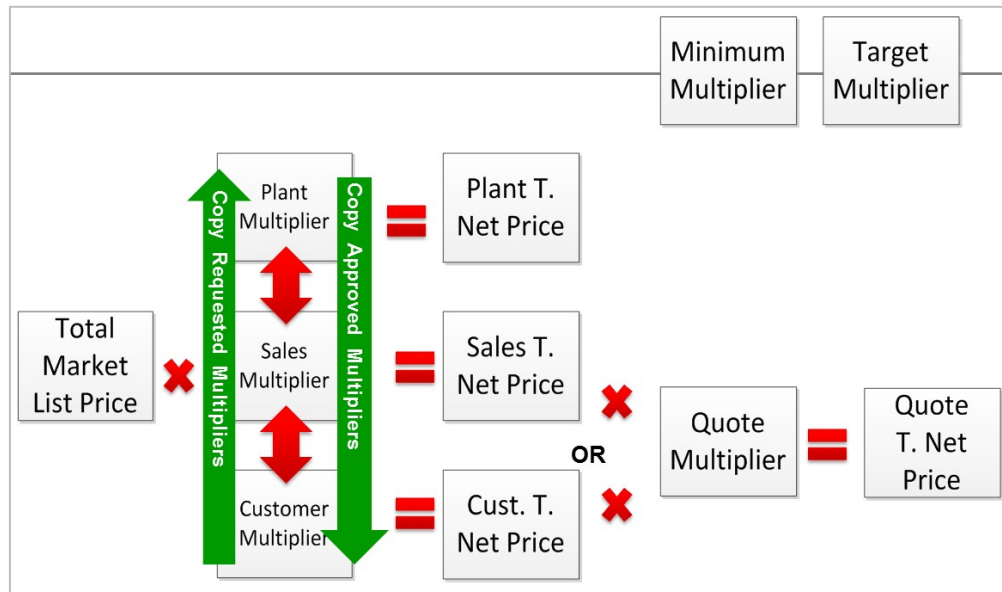
- Click **Explode Items** when there are product lines will only accept a single quantity per line item.



**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.

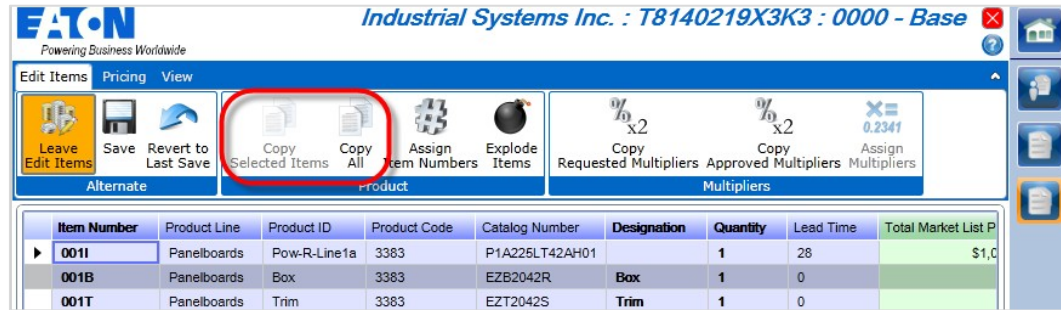
### Copy Pricing to a Spreadsheet

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.

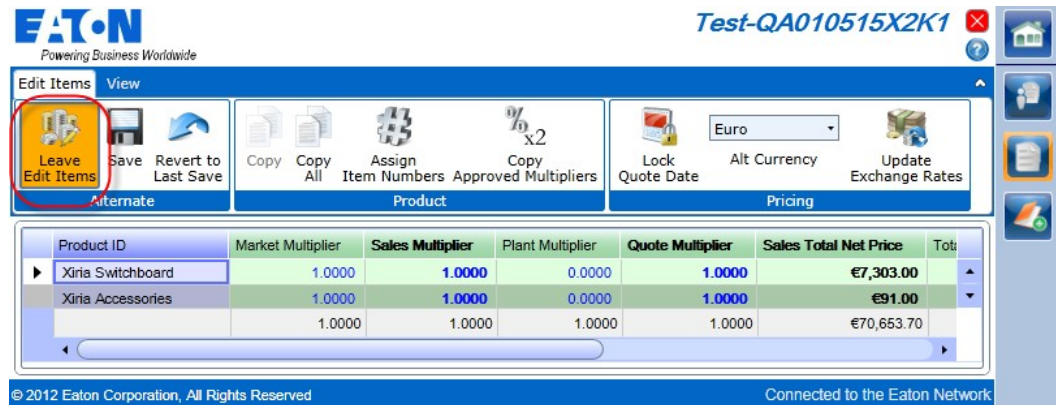


- Right click on the destination cell in the spreadsheet, and select **Paste** or use Ctrl+V on the keyboard.



### 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.



### Related Topics:

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

## Create a Document Package

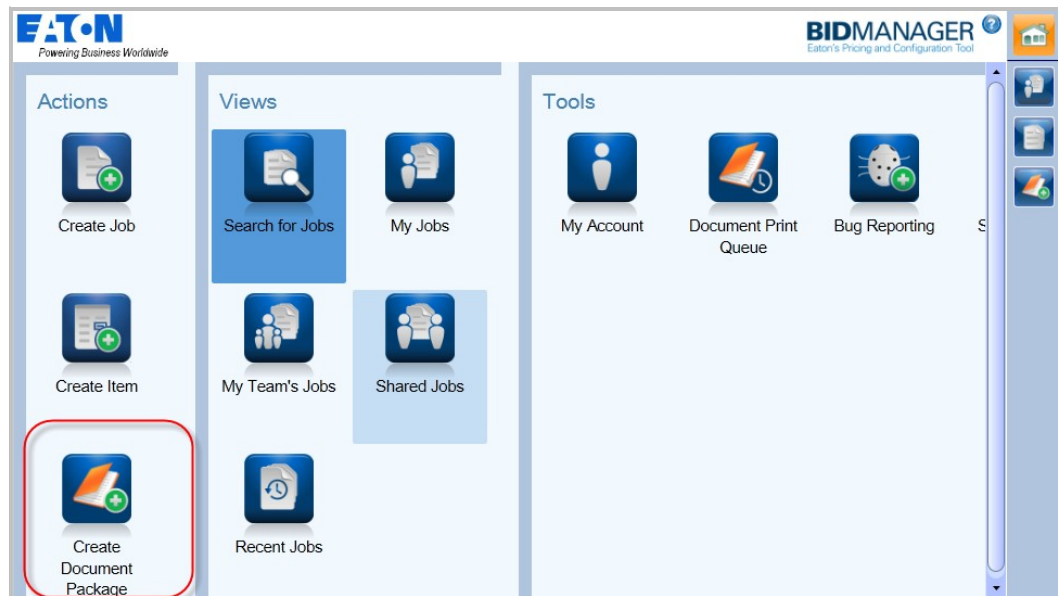
The Documentation Service tool is designed to assist with compiling job related documents from one or more job alternates together into a complete PDF document package. Any document can be added into this package, and many standard documents are available for selection. The compiled PDF document can 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:

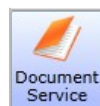
- [Navigate to the Documentation Service](#)
- [Enter the Job Information](#)
- [Select Documents](#)
- [Configure the Package](#)
- [Submit the Package](#)
- [Set Defaults for Displaying Pricing in Document Package](#)

### 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 material to the document package as well.

The screenshot shows the Eaton Documentation Service interface. The top navigation bar includes steps: 1 Enter Job Info, 2 Select Documents, 3 Configure Package, and 4 Submit Package. The main content area is titled 'Geothermal Facility Yukon1' and contains several sections:

- Jobs included in document package:** A table with columns: GO Number, Neg Number, Alternate, Job Name, Report Alt. The first row shows: SHU0062569, k5660211X3K1, 0000, Geothermal Facility Yukon1, 0000.
- Add Additional Job to the package:** A text input field containing 'geothermal' and a search icon. Below it, text reads: 'For example, type a negotiation number, GO number, or job name.'
- Job Reporting:** Two dropdown menus: 'Quote Type' and 'Status \*' (set to 'Obtained').
- Regional Settings:** Two dropdown menus: 'Language' (set to 'English (United States)') and 'Currency Format' (set to '9,999.99XXX').
- Table of Contents:** A sidebar on the right with sections: 'Main Documents' (No Documents Specified), 'Panelboards' (No Documents Specified), 'Dry Type Transformers' (No Documents Specified), and 'Closing Documents' (No Documents Specified).

Footer: © 2013 Eaton Corporation, All Rights Reserved. Logged in as DANNY ROSS (K566).

The screenshot shows the Eaton Documentation Service interface with a 'Search Results' dialog box open. The dialog box contains a table with columns: Add, GO Number, Neg Number, Alternate, Description, and Job Name. The table lists several search results:

Add	GO Number	Neg Number	Alternate	Description	Job Name
<input checked="" type="checkbox"/>	Geothermal Facility Yukon1, k5660211X3K1, SHU0062569				
<input type="checkbox"/>	SHU0062569	k5660211X3K1			Geothermal Facility Yukon1
<input type="checkbox"/>			k5660201X3K1		Geothermal Facility Yukon
<input type="checkbox"/>			k5661212X2K2		Pretending to be a Distributor Take 2
<input type="checkbox"/>		k5661212X2K2			Pretending to be a Distributor Take 2
<input type="checkbox"/>	Freedom Touchdown Warehouse., k5660206X3K1, SHU0062561				
<input type="checkbox"/>	SHU0062561	k5660206X3K1			Freedom Touchdown Warehouse.
<input type="checkbox"/>			K5660130X3K1		Antilles Regional Shopping Environment
<input type="checkbox"/>		K5660130X3K1			Antilles Regional Shopping Environment
<input type="checkbox"/>	Yellow Facility East-K5660123X3K1-K5660123X3K2, K5660123X3K2				
<input type="checkbox"/>			K5660123X3K2		Yellow Facility East-K5660123X3K1-K5660123X3K2

Buttons: Expand All, Collapse All, OK.

- 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.

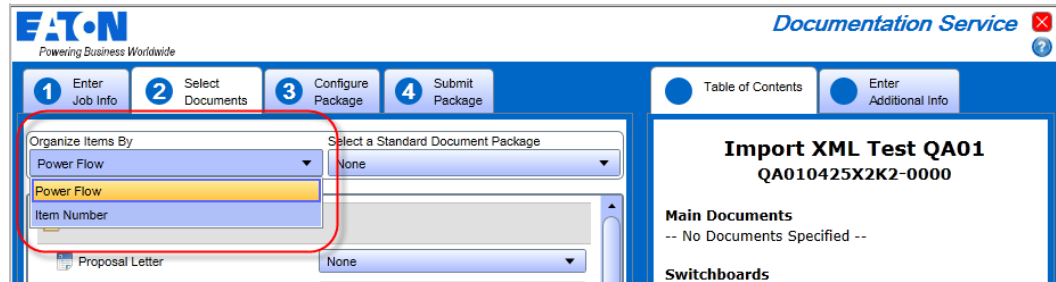


- Optionally, change the Job Reporting and Regional Settings in this tab as well.

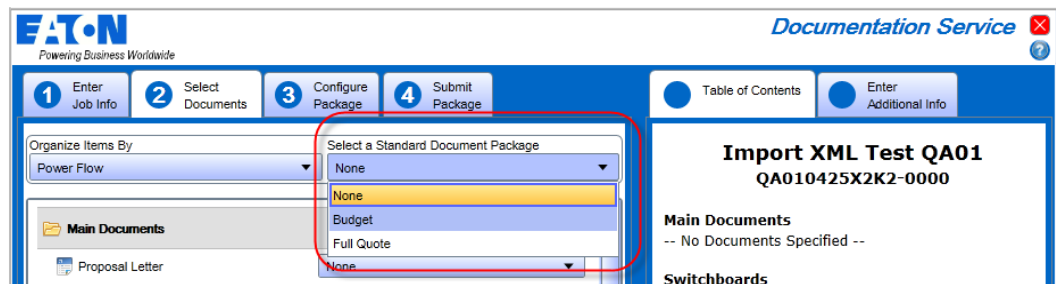
### Step 3: Select Documents

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

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



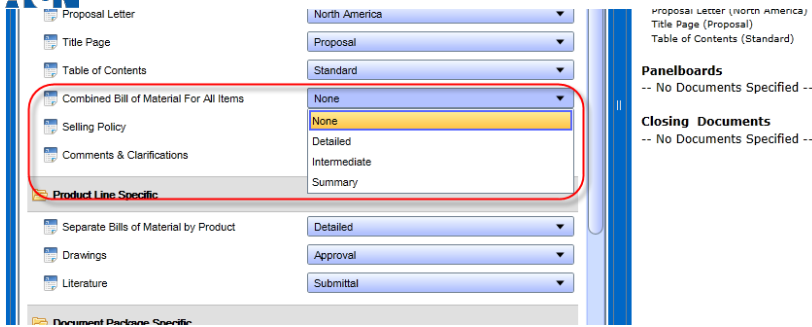
- Power Flow** selection will order the products from highest voltage to lowest voltage by product type (Switchboard, Panelboard, Safety Switch...)
  - Item Number** selection will order the products by their item number that was assigned in the Edit Items screen.
- If desired, select a **Standard Document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



**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*).

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

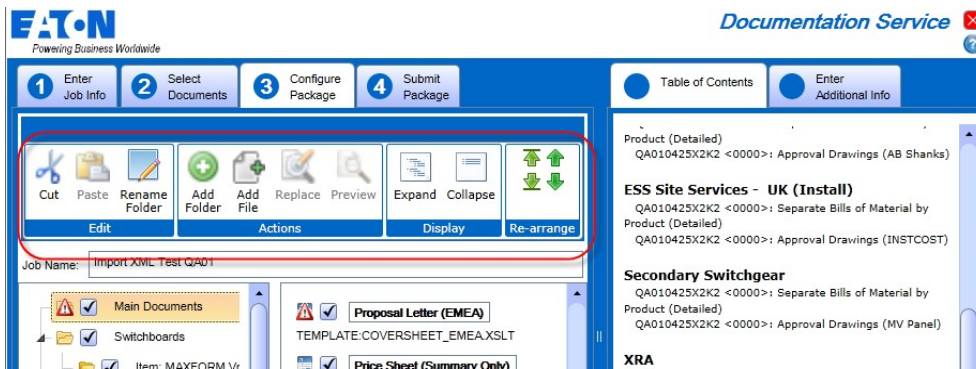
**Note:** To show a price in the document package, a *Bill of Material* must be selected in the **Main Documents**.



## 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.

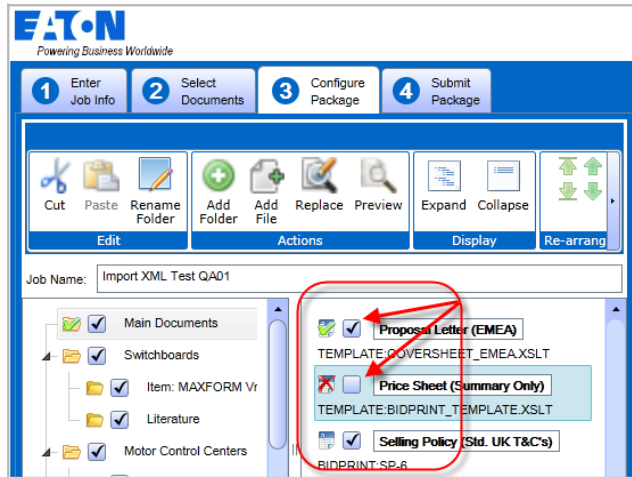
1. Use the buttons in the ribbon bar to configure the document package.



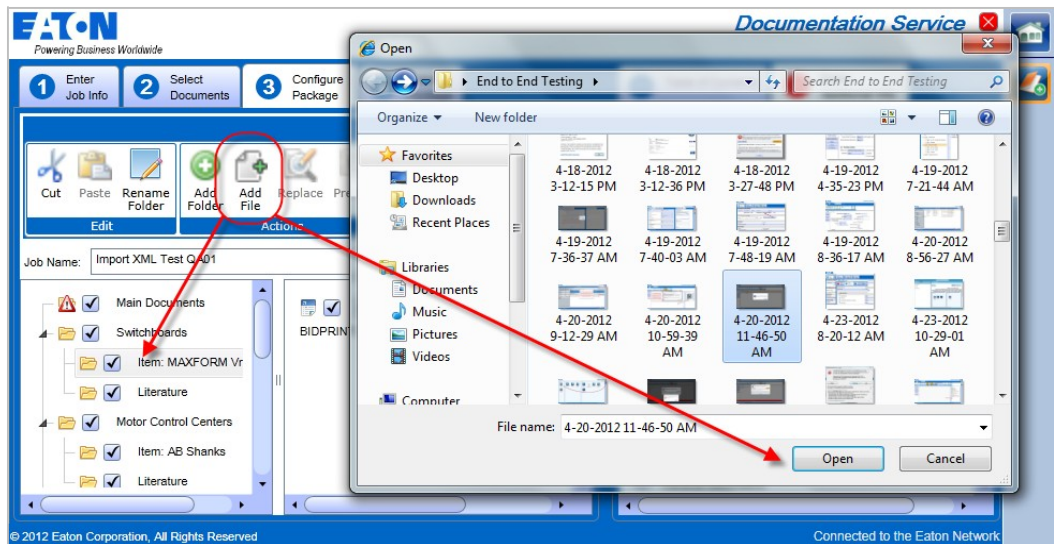
Button Group	Button Name	Description
Edit	Cut	Cut a folder or document
	Paste	Paste the cut folder
	Rename Folder	Rename the selected folder
Actions	Add Folder	Add a Product Line Folder
	Add File	Add a file from a local drive
	Replace	Replace selected item with another
	Preview	Preview document (documents can be previewed 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 reload 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.

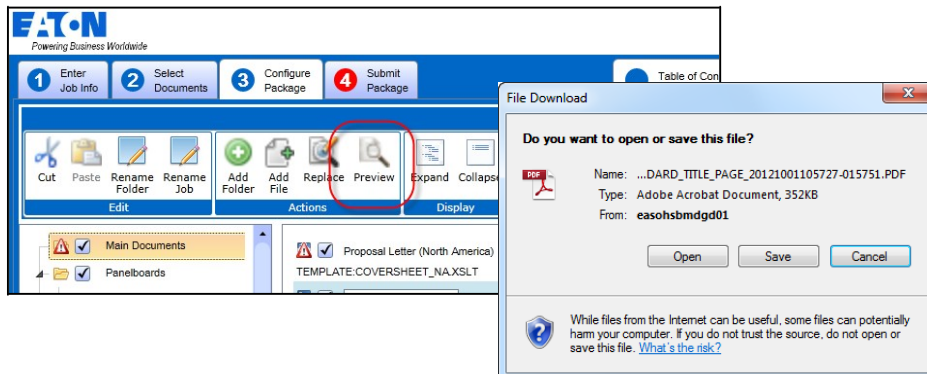
2. Select or unselect items with the check mark box next to the item to show or hide the document in the final package.



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.

1. 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.

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).

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.

The screenshot shows the 'Enter Additional Info' tab with the following sections:

- Customer Information \*** (expanded):
  - First Name \*
  - Last Name \*: Doe, John
- Proposal Letter Recipient \*** (collapsed)
- Sender Information \*** (expanded):
  - First Name \*
  - Last Name \*
  - Job Title \*
  - Address 1 \*
  - Address 2 \*
  - City \*
  - State \*
  - Zip Code \*
  - Phone Number \*
  - Email \*

The screenshot shows the 'Table of Contents' tab for a document titled 'Geothermal Facility Yukon1'. The content is organized into several sections:

- Main Documents**
  - Proposal Letter (North America)
  - Title Page (Proposal)
  - Table of Contents (Standard with Page Numbers)
  - Selling Policy (25-000)
- Panelboards**
  - Separate Bills of Material by Product (Detailed)
  - Item 0011 (Approval Drawings): P4D250LTAH01
  - Item 0021 (Approval Drawings): P1A225LT42AH01
- Dry Type Transformers**
  - Separate Bills of Material by Product (Detailed)
  - 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.

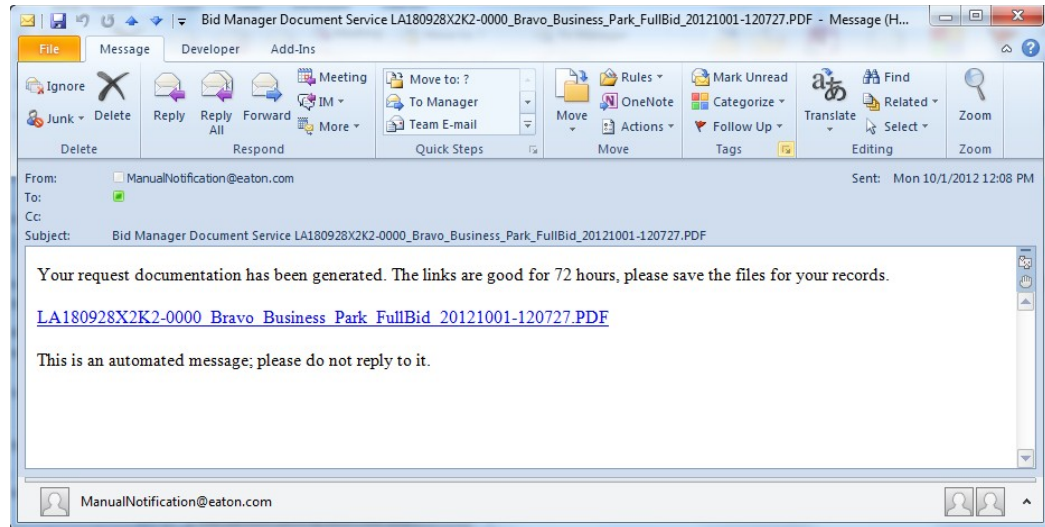
The screenshot shows the 'Customer Information' section with a search interface:

- Current Selections** and **Search** tabs.
- Instructions: "Please enter text in the search field below and click [Search] to search for a customer, then select a result from the list or manually enter the customer information in the fields below."
  - Search: [Text Input]
- Table with columns: Vista ID, Company Name, City.
- Filter results by Geography: (unfiltered)
- Fields for manual entry:
  - Vista ID:
  - Recipient Company Name \*
  - Address:



## 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.

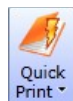


**Note:** The PDF file will contain bookmarks and a table of contents if selected in tab2.

## 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.

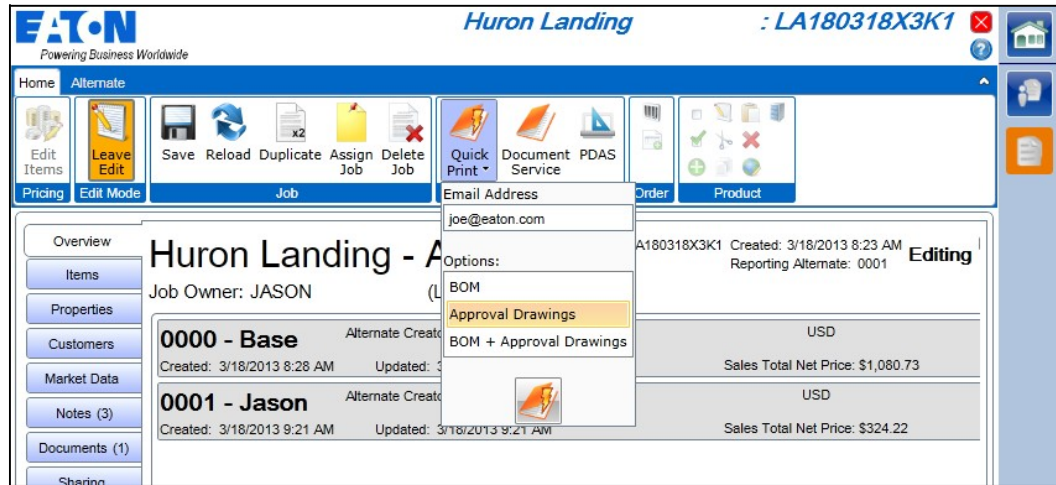
1. Select an alternate to quick print.
2. In the Home top tab, click the **Quick Print** button.



3. Enter your email address in email field.

4. Select the type documents to print.

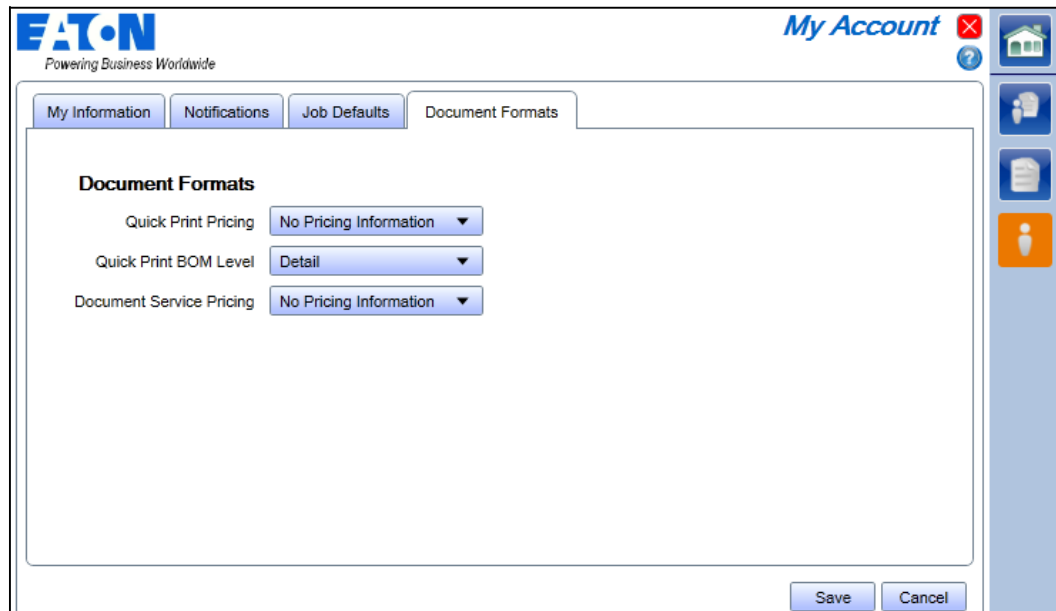
**Note:** The level of detail for the Bill of Material can be selected in the My Account settings.



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**.



## 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](#)
- [Accept Authorized Price](#)

### Step 1: Adjust Multipliers

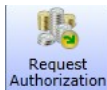
1. Navigate to the job and select an alternate.



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 Request For Quote**

Shively Regional Hospital D0L60221X3K1 - 0000


Please provide information about the job.

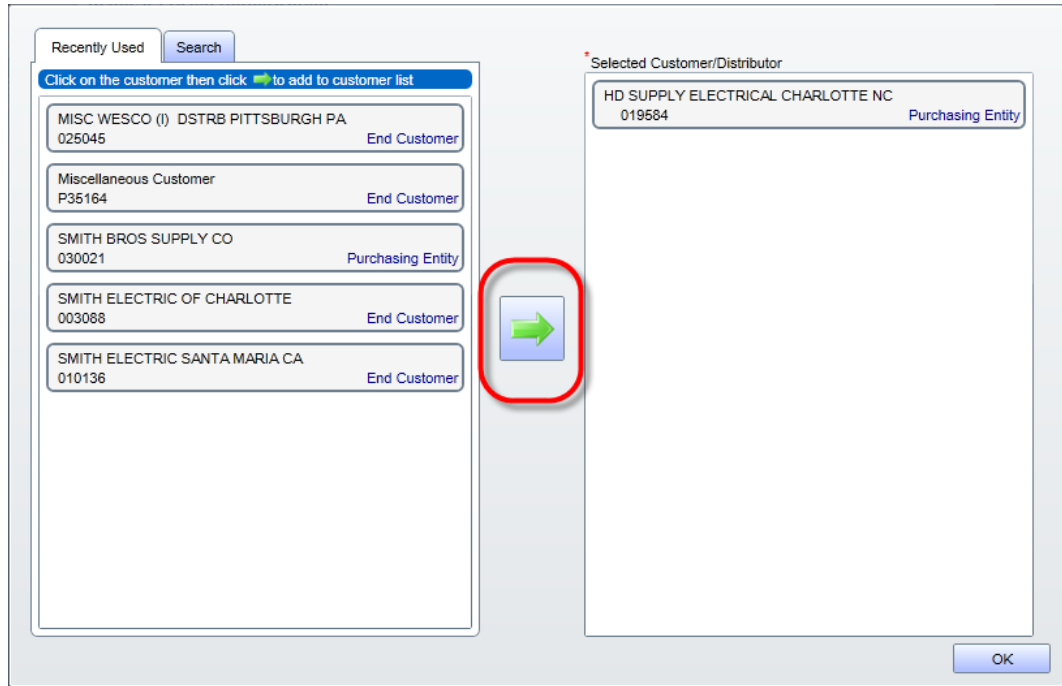
My Email\*  Competition

Sales Rep\*  End User / Contractor

Please explain why you are requesting lower levels.

Notes

3. If necessary, click on the search button  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.



Customer Name	Customer ID	Customer Type
MISC WESCO (I) DSTRB PITTSBURGH PA	025045	End Customer
Miscellaneous Customer	P35164	End Customer
SMITH BROS SUPPLY CO	030021	Purchasing Entity
SMITH ELECTRIC OF CHARLOTTE	003088	End Customer
SMITH ELECTRIC SANTA MARIA CA	010136	End Customer

Selected Customer/Distributor
HD SUPPLY ELECTRICAL CHARLOTTE NC 019584 Purchasing Entity

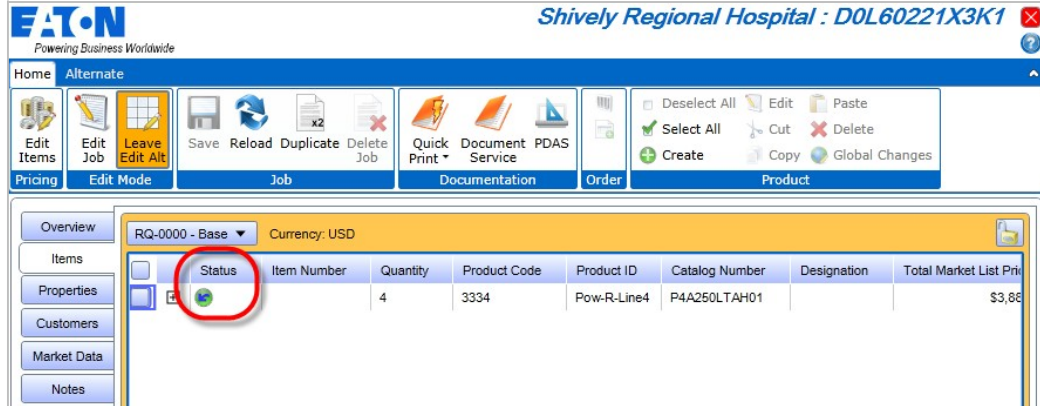
6. Type an explanation in the notes section to tell the product line why the special pricing is needed.
7. Verify all the information is correct and then click **Send**.

### 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.

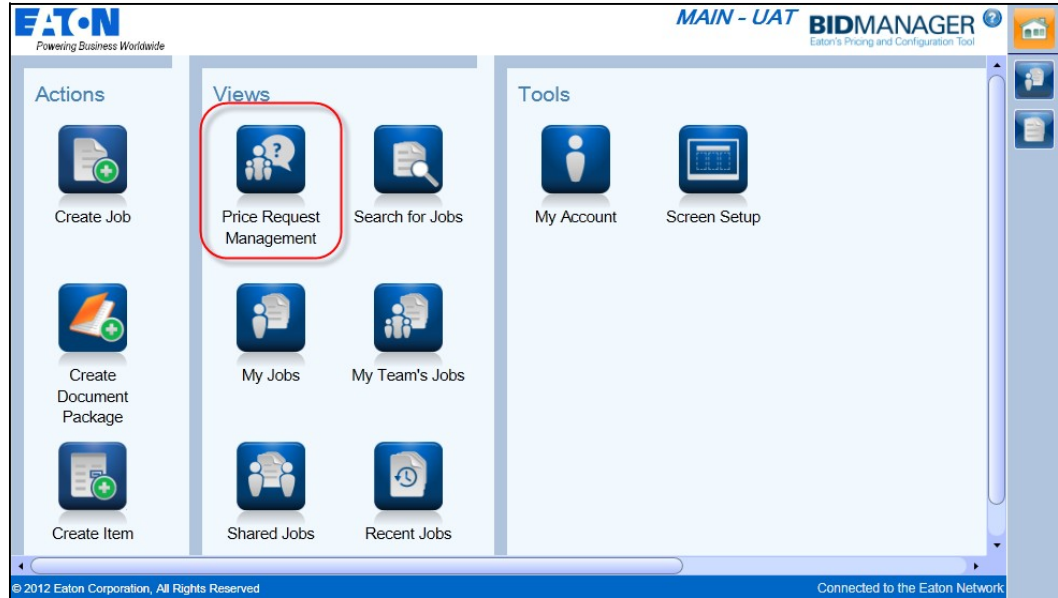
#### Check the Status of the DRFQ

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

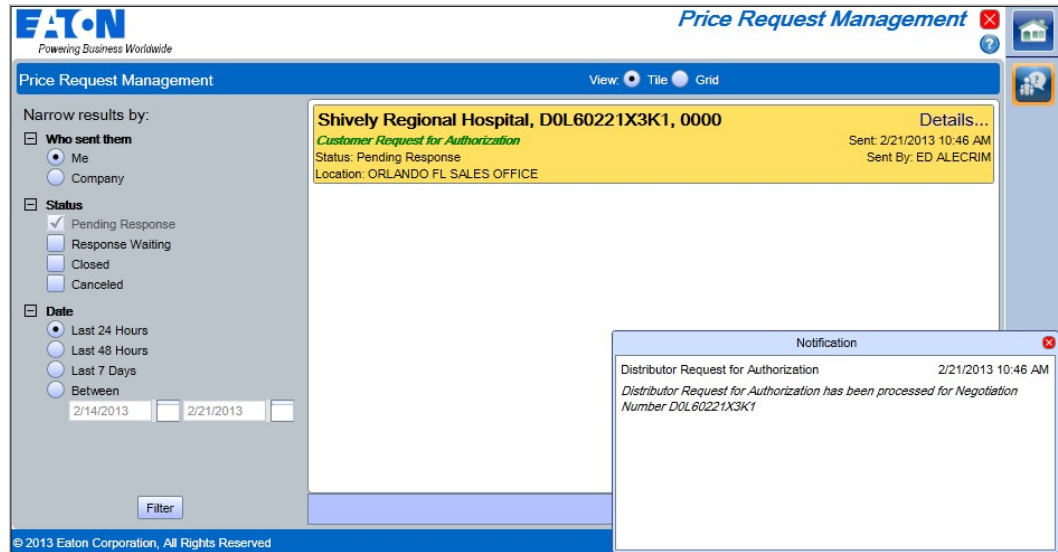


Status	Icon	Definition
Needs Approval		Multiplier is below the value in the Minimum Multiplier column.
Pending Response		Requestor has sent DRFQ and is waiting a response from Approver
Response Waiting		Approver has sent a response and is waiting for Requestor to respond
Closed		
Approved		Approver has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

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



- 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.
2. 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.



4. 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.

**Accept Response for Job Shively Regional Hospital : 0000**

Item: Pow-R-Line4,	
<i>Requested</i>	<i>Approved</i>
Customer Total Net Price: \$466.12	Customer Total Net Price: \$466.12
Quantity: 4	Quantity: 4
Customer Multiplier: 0.12	Customer Multiplier: 0.12

Item: Box, Box	
<i>Requested</i>	<i>Approved</i>
Customer Total Net Price: \$0.00	Customer Total Net Price: \$0.00
Quantity: 4	Quantity: 4
Customer Multiplier: 0	Customer Multiplier: 0

Accept Exit

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**.

- 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.

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

- 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.

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

## 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.

## 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.

The screenshot shows the 'Order Entry' application window. The 'Shipping' tab is active, displaying a toolbar with buttons for 'Distributor', 'Contractor', 'Validate', 'Clear', and 'Search Address'. Below the toolbar, the 'Shipping Address' section is visible, showing the company name 'Georgian Flower Yardmart' and various order numbers. The main form area is titled 'Job Site Information' and contains the following fields:

- Ship-to Address Type:** Standard (dropdown menu)
- Note:** Will Advise will set all items on hold.
- Company Name:** 3 PHASE ELECTRICAL
- Address:** UNIT 4, MINTO ROAD INDUSTRIAL CENTRE, ASHLEY PARADE
- City:** BRISTOL
- State/Province:** CN
- Postal Code:** BS2 9YW (Warning: Address is NOT valid)
- Country:** UNITED STATES (dropdown menu)
- Marks:** (empty field)
- Site Contact Name:** (empty field)
- Site Phone:** (empty field)
- Shipper to call:** (empty field) hours in advance of delivery
- Ship Method:** Shippers Standard (dropdown menu)

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**

Home Shipping Item Information

Distributor Contractor Validate Clear Search Address

Shipping Address

**Georgian Flower Yardmart-K5660** NegNumber: K5660111X3K3 Order Alternate: 0000 - Base  
Go Number: Order is managed by EatonCare

- 1 Purchase Order Information
- 2 General Order Information
- 3 Ship-to Information
- 4 Special Shipping Requirements**
- 5 Item Information

**Special Truck Requirements**

\*\*\*NOTE: Selections made here may result in additional shipping charges

Flat Bed  Power Tailgate

Union Driver

Do Not Ship Via Carrier

Preferred Carrier

Carrier Account Number

## Item Information - Tab 5

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

Item Number	Product ID	Designation	Item Status	Standard Ship Date	Required Ship Date	Do Not Before
0011	Pow-R-Line4		Hold			
001B	Box	Box	Release			
002I	Pow-R-Line1a		Hold			
002B	Box	Box	Release			
002T	Trim	Trim	Hold			
003	Dry Type Transformer		Release			

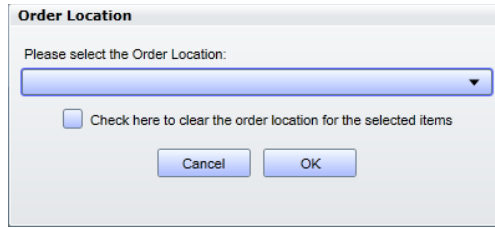
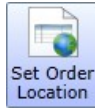
**Note:** To select multiple items at once, press **CTRL** on the keyboard and click on additional items. Additionally, use the **Select All** or **Unselect All** buttons in the Item Information top tab.

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

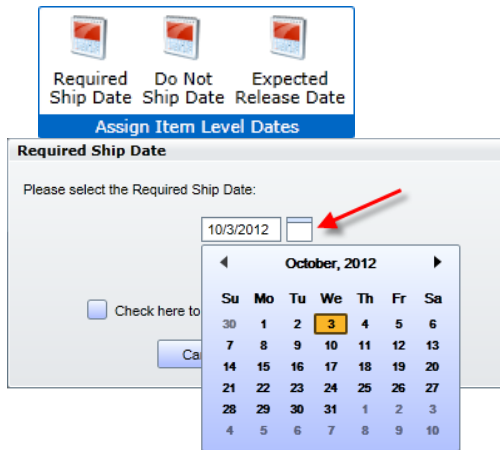
3. Select an item(s) to change the hold status and use the **Item Status** buttons in the Item Information top tab. If choosing to hold items, make a selection from the window that appears and click **OK**.

**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.



5. 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.



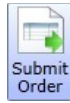
**Note:** The information will be saved and available next time you click on the Order Capture button in the alternate.

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.

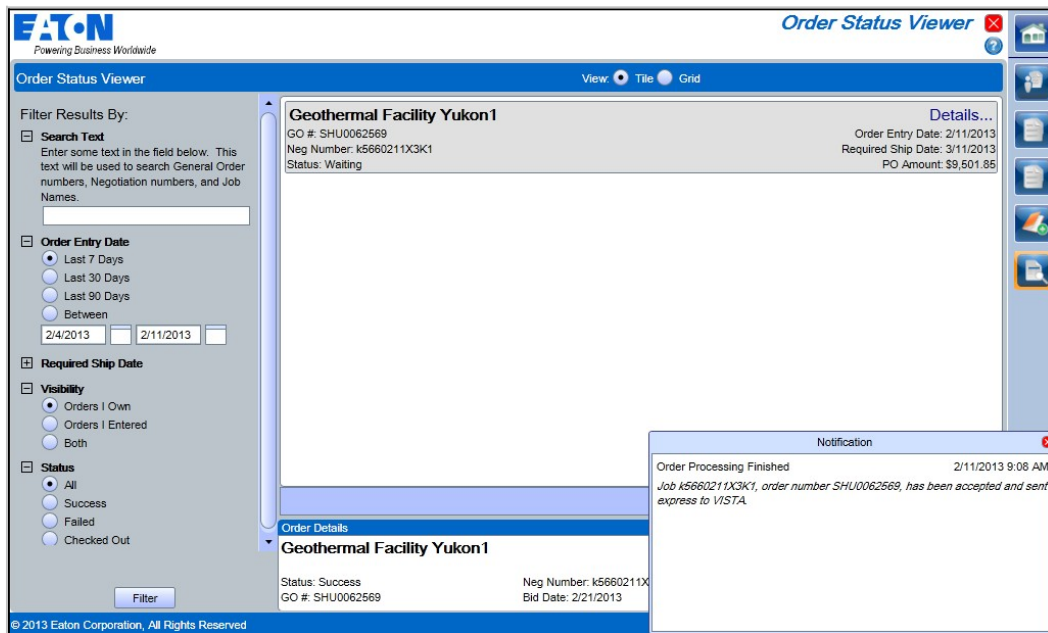
- Click the **Submit Order** button to place the order; the order will be sent to be processed immediately.



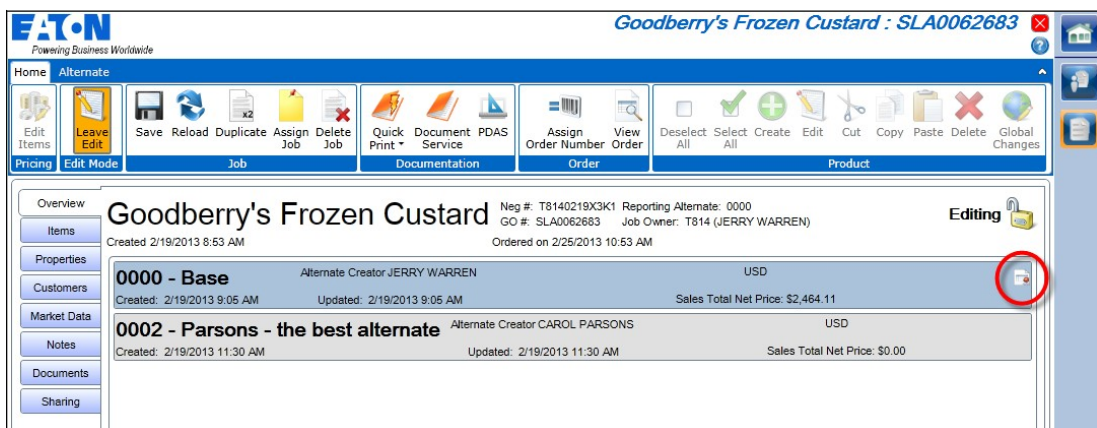
### After the Order

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.



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





## 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:

- [Create the Non Eaton Item](#)
- [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.

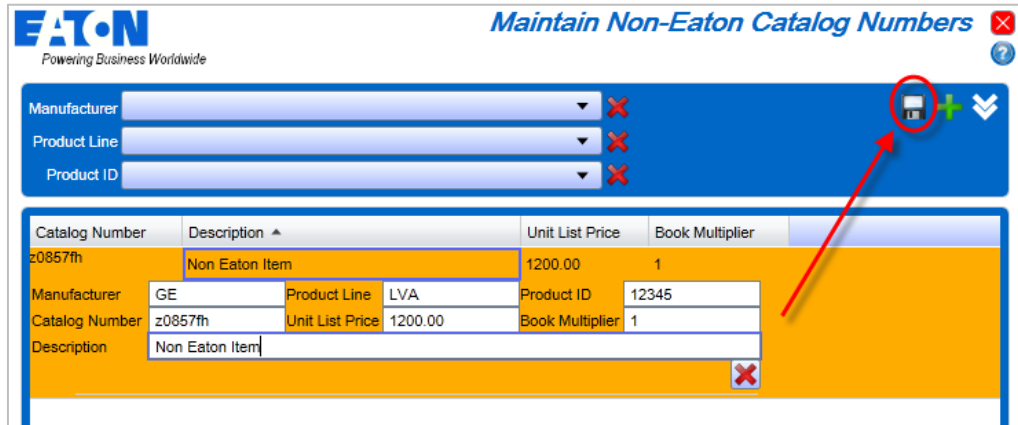
**Note:** If the icon is not on the home page, add it using the **Screen Setup** icon.



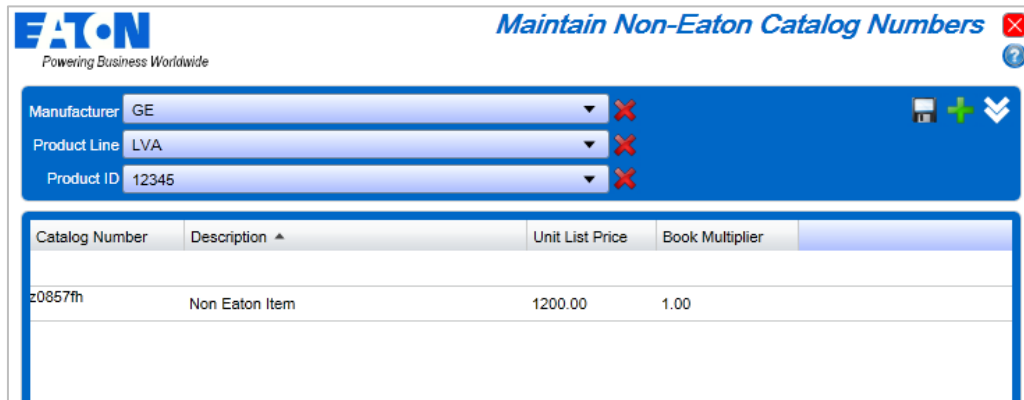
2. When the Maintain Non-Eaton Catalog Numbers page loads click the **Green** plus sign in the upper right corner of the screen.

Catalog Number	Description	Unit List Price	Book Multiplier
	<input type="text"/>		

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



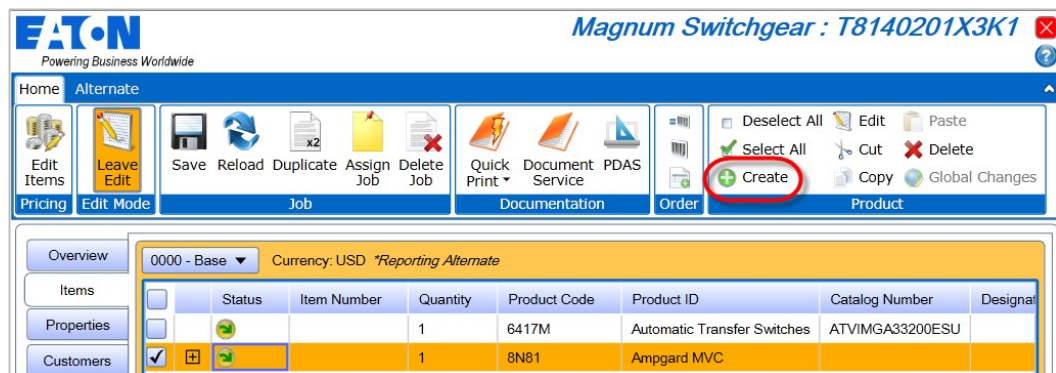
- The new item will appear in the Catalog list.



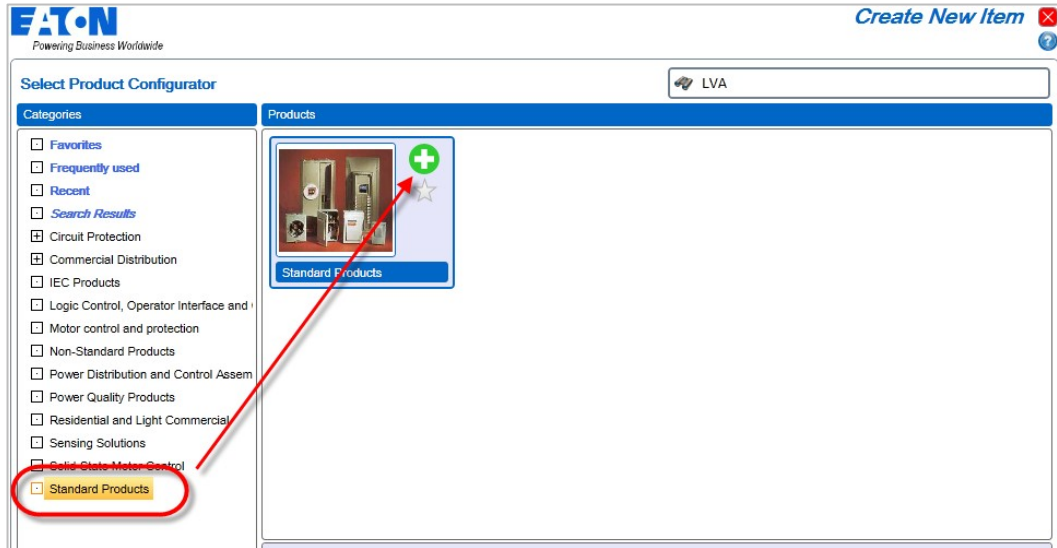
### Add Non Eaton Item to Job

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

- Click the Create icon in the Product icon group.



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.

