

# WinBidPro v15 Quick Start Guide

## *Installation and Setup*

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## Why WinBidPro?

*“Watch the pennies and the dollars will take care of themselves.”*

*--Benjamin Franklin*

The primary reason for the existence of WinBidPro is to **win storefront and curtain wall contracts** for fenestration professionals. While there are many other benefits to using WinBidPro, if working with the program does not result in a winning bid, then all the work is for naught.

## How to Win More Bids?

The key to winning a contract is accurately estimating the cost of doing the job. The bid price, although not the only consideration, is always a major factor in the awarding of contracts. If the bid is too high, then you may be taken out of the running. If the bid is too low, you may win a losing bid—or worse yet, the contractor may suspect the quality of your work. The key is to submit a competitive bid that keeps you in the running, and will turn a profit when you win it. The only way you can do that is by attending to all of the details of the job while you're creating your estimates.

That's where WinBidPro comes into the picture. WinBidPro assists you in entering and tracking all of the details of a bid. Comprehensive parts catalogs from manufacturers automatically include the specific parts for every job. As you build your bid on your computer screen, CAD drawings can be generated for planning and review. The flexibility of WinBidPro allows you to quickly respond to changing design specifications.

Once you win the contract parts and material lists are automatically generated for ordering. Stock lengths are optimized for cutting. There is even a CAD program for tweaking the WinBidPro drawings included in the package.

## Who Else Uses WinBidPro?

Although designed for estimating and optimizing winning storefront and curtain wall bids, WinBidPro is used for many different purposes. The companies that take advantage of the many features in the program create shop drawings (which are an added facet of estimating a job), the cut list (a byproduct of optimization) for fabrication of the material for a job, and a combination of all of these for the installation job. That means that any company in the chain of supply can take advantage WinBidPro features.

The ordering of the material and glass takes place after a job is awarded to a glass contractor. Those people who use our software merely update the dimensions of the drawings to represent the true sizes in the already constructed building. At this point the optimization is critical for both ordering material and fabrication. Glass reports are printed to order the glass through the supplier of their choice.

Labels can then be generated to organize both glass and stock pieces by elevation. Some companies use the cut piece labels to mark and organize cut pieces for installers out in the field. The same is done with glass labels. Labeling the glass helps installers know where glass in the elevation is to be located without trial and error.

All of these final uses for WinBidPro require exact sizes and cuts. Mistakes in this process are costly since glass is ordered to fit exactly and any metal cut wrong is often unusable. Therefore, those who

use WinBidPro are shop owners, estimators, project managers, shop foremen, and even sales reps for suppliers.

Suppliers themselves fit into two categories: a manufacturer who directly supplies glass shops, and distributors who wholesale material to glass shops. The latter is the case in less populated states such as Montana. One distributor in Billings supplies all of Montana and parts of other northwestern states.

WinBidPro is used by both inside and outside salespeople for manufacturers and distributors. They use it strictly as a service to their customers helping them to bid the job and place orders. This is offered as a service to customers who either don't have a dedicated estimator, or the estimator is not comfortable working with a computer.

Anyone who works in the fenestration contracting chain can benefit from using WinBidPro, although the motivations vary from winning the bid to completing the job.

## **Why Upgrade to WinBidPro v15?**

If you're already using WinBidPro v14, then you may wonder why you would need to upgrade to v15. It's not a matter of cost, since as a current WinBidPro user, the upgrade is free. The primary obstacle might be the slightly different look and feel of v15. It does take a little while to grow accustomed to the new interface although the benefits will greatly outweigh any time it takes to make the change.

WinBidPro v15 is not merely an updated version of v14, but new program with numerous new features (including a CAD program for working with WinBidPro generated drawings) This new design was necessary to eliminate some of the awkward steps employed in v14. With ease-of-use in mind, v15 has simplified the design and viewing process while adding much greater flexibility.

One of the most important changes involves how parts and glass lists are handled. In WinBidPro v15, new separate lists which stay with the job are generated from the original master vendor catalog isolating each job from future changes in the catalogs. In version 14, when you made a change to the vendor catalog it would affect all the old jobs, even if it was not appropriate. In version v15, you have more control over each individual job. Changing the job or final parts list for a particular job will not change any other job in the works.

The process of creating a job in v15 follows a natural flow while it is easy to jump to various parts of the job when making changes. With this new approach, you will find that you are ultimately producing your jobs quicker and more accurately. See the next section to review what's new in WinBidPro v15.

## **WinBidPro Storefront and Curtain Wall Design, Optimization, and Bidding Program, Version 15 (v15)**

WinBidPro version 15 (V15) is a completely new development of version 14 (V14) which offers added functionality greatly enhancing both the capabilities and the ease-of-use of the program. What was once primarily an estimating and optimization program, WinBidPro is now a set of valuable planning and design tools for constructing storefronts and curtain walls.

### **New Features in WinBidPro v15**

#### **New Features**

- WinBidPro v15 now includes a CAD program for full editing and printing of drawings generated by WinBidPro—including details from manufacturers.
- When using WinBidPro v15, the entire current detailed elevation drawing is always in view—no matter which components you are working on.
- When using WinBidPro v15, you can easily skip from one elevation to another in a job without first leaving the drawing window.
- The elevation drawings are truly WYSIWYG, where cut pieces are literally based on the drawing you see on the screen.
- Elevation drawings are fully dimensioned from the start. Pan, zoom, quick zoom, and distance features are available with any drawing.
- Adding doors in the v15 WinBidPro program is entirely different from v14. Door frames and leaves have been separated out of the Framing Systems section of the program. You now have full control over a list of individual door frames and door leaves, plus there are pre-configured entrances (door frames and leaves together). You can edit, add to, and delete items from these lists any time, both at a vendor level, and an elevation level. You can also configure an Entrance which includes the door frame and leaf you select. This is especially helpful if you consistently use the same entrance, since you will be able to add this to any elevation in one step.
- DWG and/or DXF files are saved from the native CAD elevation drawings when either the CAD or Shop Drawings link is clicked.
- Most reports can be exported to both PDF and XLS format files.
- Final Glass and Final Part reports can be exported to GTS GlasPac LX software for job costing and project management.
- A Print Reports window allows you to print multiple reports consecutively either in preview, or directly to print. Lists of the various vendor information can be printed from one Print Lists window.

### **Enhanced Features for Added Flexibility in WinBidPro Version 15**

#### ***Limitations Are Removed from Vendors Catalogs***

- An unlimited number of vendor catalogs which can be stored on local or network drives. (Limit 10 catalogs in v14.)
- Multiple users can access the same vendor at a time. (Single user only in v14.)

- A vendor catalog can have an unlimited number of framing systems. (Limit 200 in v14)
- Up to ten color prices can be listed for a given vendor. (Limit five in v14.)

### ***More Flexibility When Working with Jobs***

- Parts and frame system information is saved and isolated for each job. Pricing, stock length, and frame settings can be changed in the default lists without affecting jobs created in the past. These changes can also be made at the job level without affecting the default lists.
- Cut lists can be created manually via the Optimizer by creating a job with a dummy elevation. Multiple jobs of this type can be created.
- The Optimizer window lets you edit and add cut parts for your job before you calculate your stock length requirement.
- Stock lengths can be manually added to the Optimizer to figure into the optimization of stock lengths. The length of stock pieces can also be altered in the Optimizer.
- Changes to pieces and stock lengths in the Optimizer can be saved so they won't be overwritten when a job is re-optimized.
- Labor is configured by cut, joint, and system type. Perimeter caulking and pressure plate labor can be calculated by the foot.
- Four different hourly rates can be set for labor. (Limit two in v14)
- Full control over markup and tax rates is given via the System Defaults window. Metal and glass surcharge rates can also be set.

### ***Less Job Limitations***

- Number of jobs are only limited by the size of the database: MS Access – 2GB, SQL Express – 4GB. (Program can become unstable with more than 150 jobs in v14.)
- An unlimited variety of discount multipliers can be applied to parts for a given vendor using a powerful batch update feature. (Limit five in v14.)

### ***Get More Freedom When Working with Elevations***

- Elevation layout, all components, and glass can be added and edited without ever leaving the drawing.
- Dimensions for elevation sizes and components can be entered using either decimal or fractional values.
- Elevations can be copied within a job.
- At any given time while working on an elevation drawing, you can edit the parts for that elevation. These changes only apply to the current elevation. The default list of framing systems can also be viewed and edited at any time without leaving your drawing. (Version 14 requires exiting the drawing window, modifying a frame, then assigning that frame to the elevation of your choice. In existing jobs, you needed to re-edit each elevation in order to apply the changes in the default framing system.)
- Glass can be added, deleted, and viewed by lite, row, and an entire elevation.
- Elevations are given whatever name you prefer—up to 250 characters. (Automatically named alphabetically in v14.)
- Elevations in a job can be re-ordered by manually changing a sort number.
- Multiple Splits can be added anywhere in an elevation.

- A Window (Transom) can be added to any number of panels, anywhere in an elevation.
- Simple Arch Top elevations can be drawn. More complicated arch features will be available in future updates.
- Rake tops can be drawn in both directions and in specific panels in a given elevation.
- Glass Stops can be applied to any lite of glass in an elevation.

#### ***Elevation Limitations Removed***

- Unlimited elevations within a job. 100 panels, 49 horizontals, up to 999 repeat quantity per elevation. (Limit 30 elevations, 30 panels or 100 feet wide, 12 horizontals or 32 feet high, up to 99 repeat quantity per elevation in v14)

#### ***Now Add or Change Parts at Will***

- Door leaf and door parts can be modified at any time for a given elevation. The default lists can also be viewed and edited without leaving your elevation drawing.
- Door leaves are proportionally drawn with true rail and stile sizes. Door glass can be accurately sized, as well as glass stops.
- Each door frame and door leaf contains its own hardware parts.
- Multiple vertical Splices can be defined in tall elevations, and splice hardware can be specified.

#### ***The Limits of the Number of Doors and Parts Removed***

- An unlimited number of door frames, door leaves, and saved combinations of door frames and leaves, called Entrances, can be saved in a vendor catalog. (New framing system required in v14)
- Unlimited number of glass parts in the master glass table. A minimum square footage can be set for the final glass report. (Limit 99 in v14.)
- Four different horizontal types can be used in an elevation. (Limit two in v14)
- Alternate verticals can be any width. (Had to be different width than standard verticals in v14)



## Downloading and Program Installation

### Downloading the Installation Program

### Running the Installation File

The latest version of WinBidPro is found at the Web location [www.winbidpro.com/DownloadConfirm.htm](http://www.winbidpro.com/DownloadConfirm.htm).

### Downloading the Installation File

When you click the download link at the WinBidPro Web site, the installation file will attempt to download to your computer. If you get any warnings from your system, you should accept the download. In Windows Explorer you will see the following windows:



*Illustration 1: Security Warning window in Internet Explorer when downloading WinBidPro v15.*

You have the option to either **Run** or **Save** the file GDSv15.exe. If you choose **Run** then the file will be downloaded to a temporary folder before starting the installation. If you click **Save (Recommended Method)** a window will open for selecting a save location on your computer hard drive.

### Saving the Installation File (**Recommended Method**)

The file will be saved in the default Downloads folder. If you want to save the file in a new folder, click New Folder and enter a name for the folder, in this case WinBidPro. The folder will be located in the default Downloads folder.

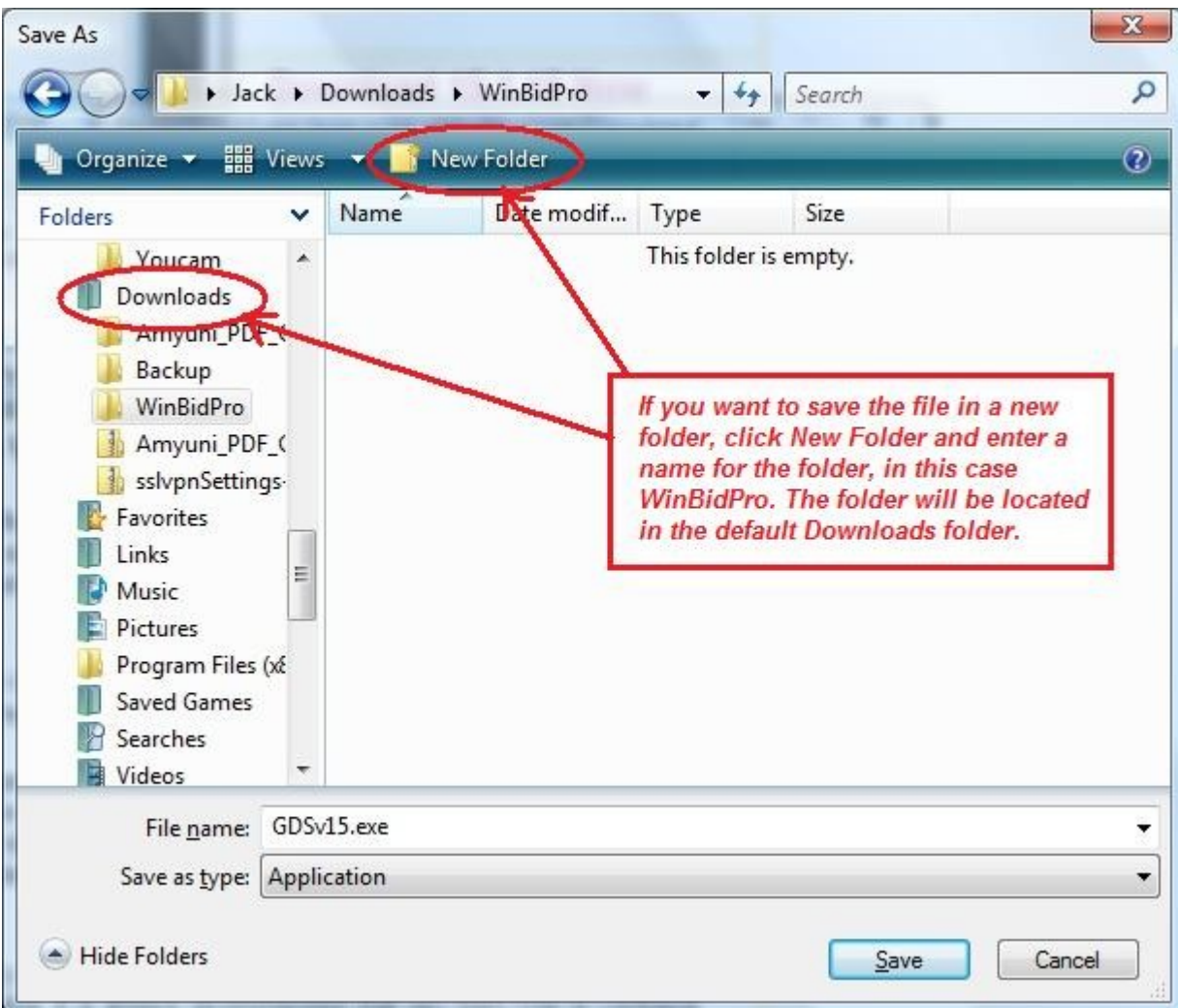
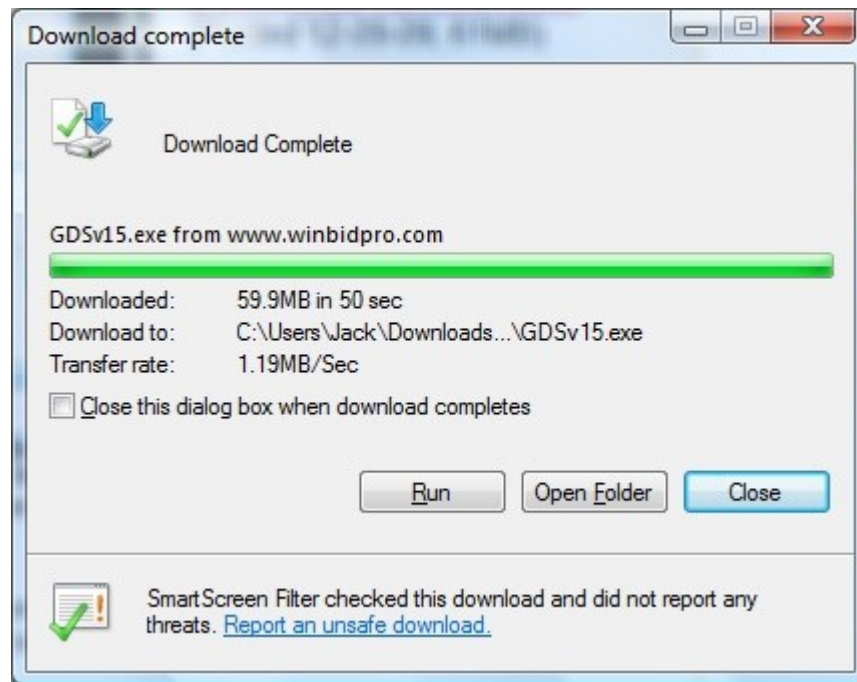


Illustration 2: The file will be saved in the default Downloads folder unless a new folder is created.

## Running the Installation Program

In Windows Explorer, once the file is downloaded, you will be given the option to **Run** to start the installation or **Open Folder** to open Windows Explorer at the file location.



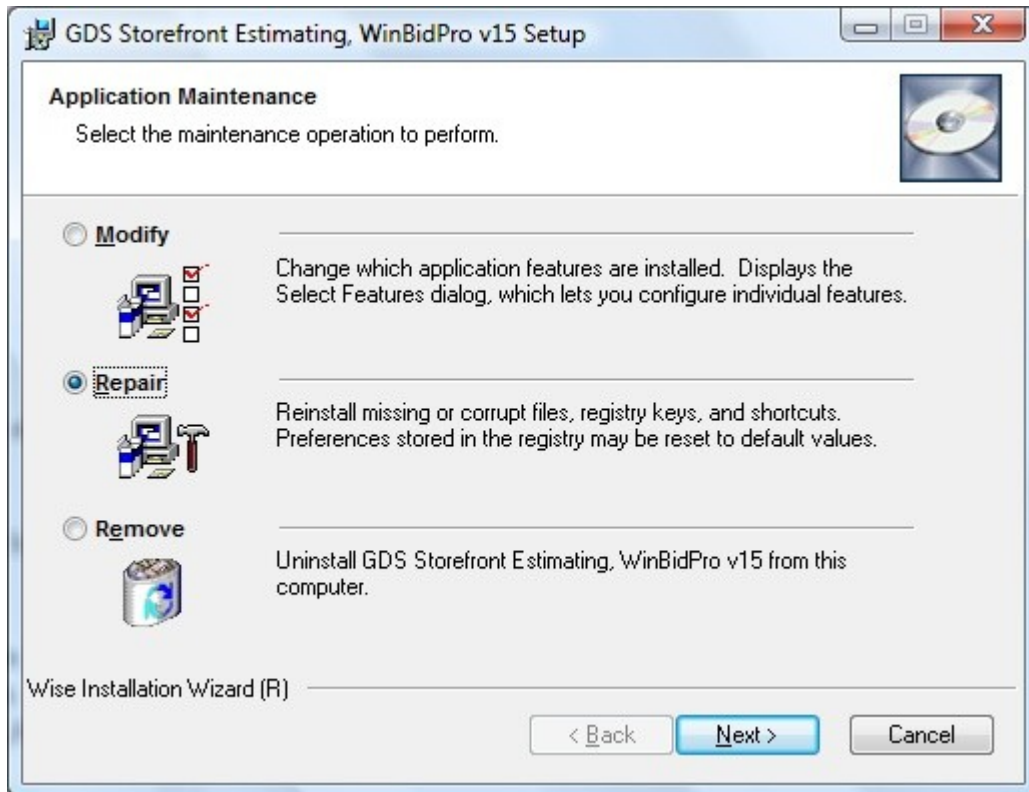
*Illustration 3: There is the option to directly Run the WinBidPro installation file or to open the file location (Open Folder) and double-click to install.*

The file **GDSv15.exe** will be found at the location where it has been downloaded. If you have not previously started the installation, or you are reinstalling WinBidPro, you can start the installation process by double-clicking the left-mouse on the file name. (If you have not opened the file location, open Windows Explorer (Microsoft logo key + E), navigate to the download folder, and double-click the file name.)

If this is your first installation of WinBidPro v15, skip to [“Install Welcome Screen.”](#)

## Reinstalling WinBidPro

One reason for saving a copy of the WinBidPro installation program is for repairing the installation or removing the installation. If during the installation process WinBidPro is found installed on your computer, you will see the following window. **Repair** will reinstall missing or corrupt files. **Remove** will uninstall WinBidPro.

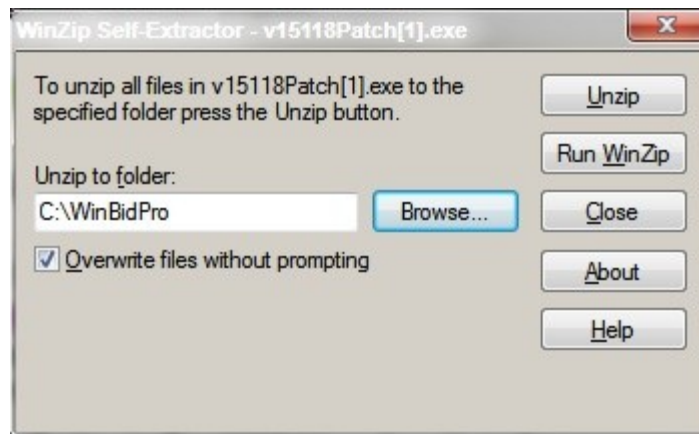


*Illustration 4: Reinstalling WinBidPro will allow the options of repairing and removing (uninstall) the program files.*

## Upgrading WinBidPro v15 with a Patch

As WinBidPro v15 is improved and issues are resolved, there are regular new releases of revisions for the program. There are often two ways to upgrade when downloading a file from the WinBidPro Web site ([www.winbidpro.com/DownloadConfirm.htm](http://www.winbidpro.com/DownloadConfirm.htm)), depending upon your current installed revision.

1. If you have kept your program up-to-date, then you may be able to download and run a patch on our download page. If available, this is by far the easiest way to upgrade. (See the instructions on the Web site for the current version of v15.) A patch is offered if there are no changes in system files that require registry changes. The patch is a zip exe file that you can unzip to the Program Folder replacing the older version. The catch is, if you installed your files to a different folder from the default, you will need to change to the correct target folder for the unzip.



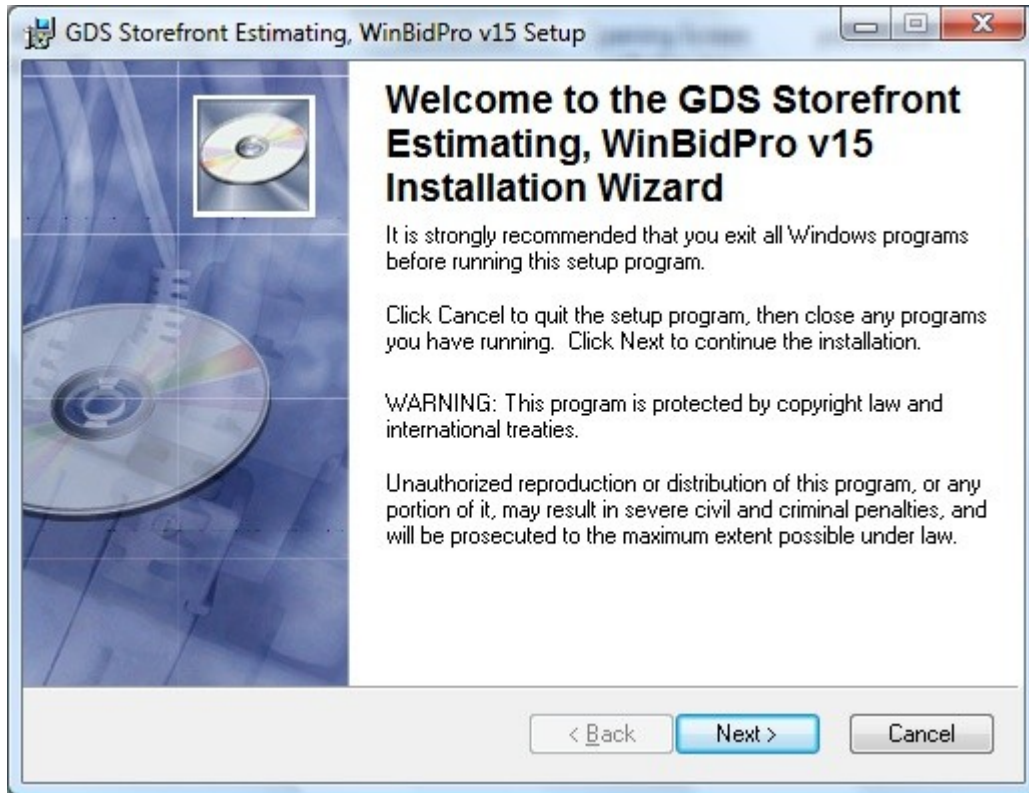
*Illustration 5: Self-Extractor window for a patch file when upgrading WinBidPro v15. Be sure close the WinBidPro program before clicking Unzip.*

Although you can access the WinBidPro page via the “Gds Web” link in the top left-hand corner of the Navigation panel of WinBidPro, you will need to close the main program before extracting the patch files. The files will not save while WinBidPro is running.

2. Alternatively, you may need to [uninstall your current version of WinBidPro v15](#), then download and reinstall the new version. This will ensure the proper installation of the entire program and make the proper registry entries. You can check which version of WinBidPro you are using by clicking the “GDS License” link in the bottom of the left-hand Navigation panel while rerunning WinBidPro. The GDS download Web page will tell you whether you need to run the new installation or if you can apply a patch depending upon your current WinBidPro v15 revision number.

## Install Welcome Screen

After calculating space requirements, the Welcome Screen is presented. Click Next to continue.

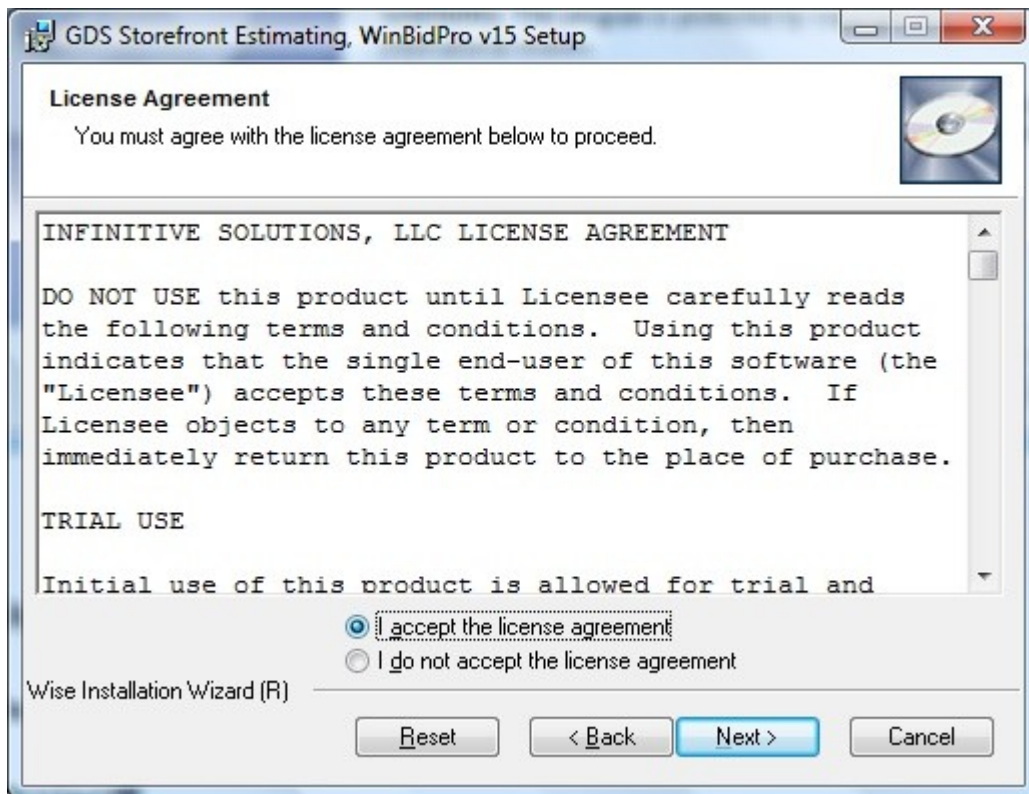


*Illustration 6: It is strongly recommended that you exit all programs before continuing with the installation program. This will minimize the possibility of conflicts.*



## Install License Agreement Screen

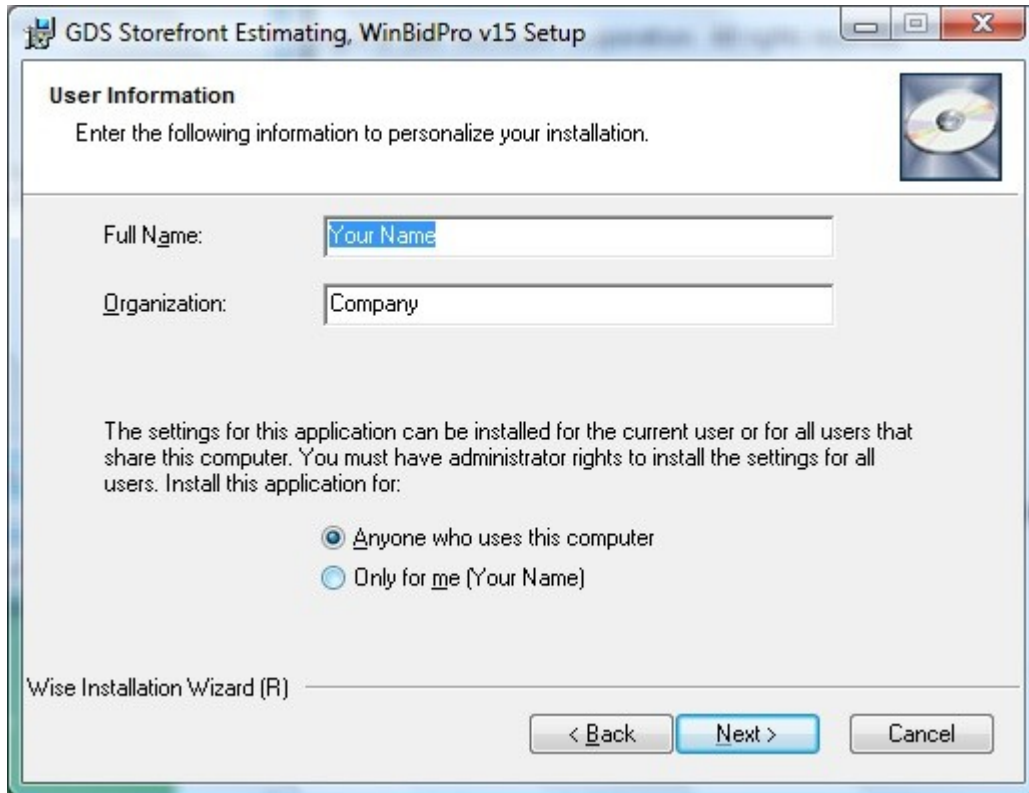
Next, you will be presented with the License Agreement screen. Select “I accept the license agreement” to continue. Click the Next button:



*Illustration 7: The License Agreement must be accepted before continuing with the installation..*

## Install User Information

The User Information screen is the next window:



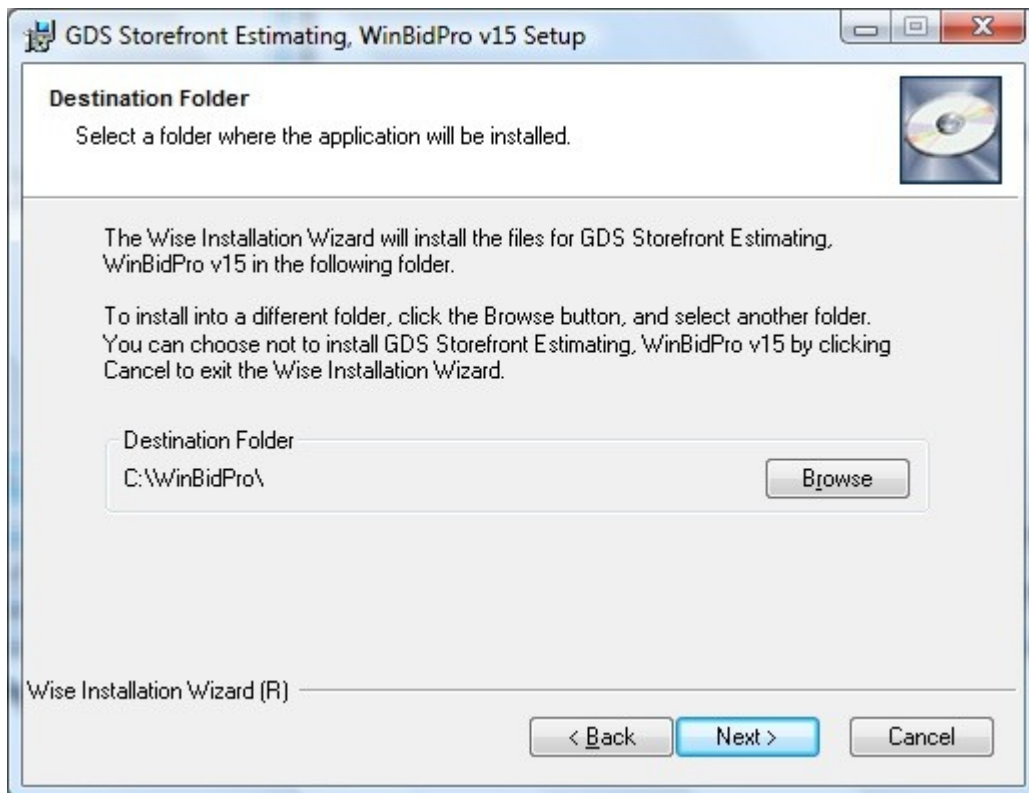
*Illustration 8: By default, anyone who uses the computer will be able to run WinBidPro.*

Enter your full name and organization. Then indicate whether the WinBidPro installation will be used by any user on the computer or only you. By default anyone who uses the computer will be able to run WinBidPro. Click the Next button to continue.



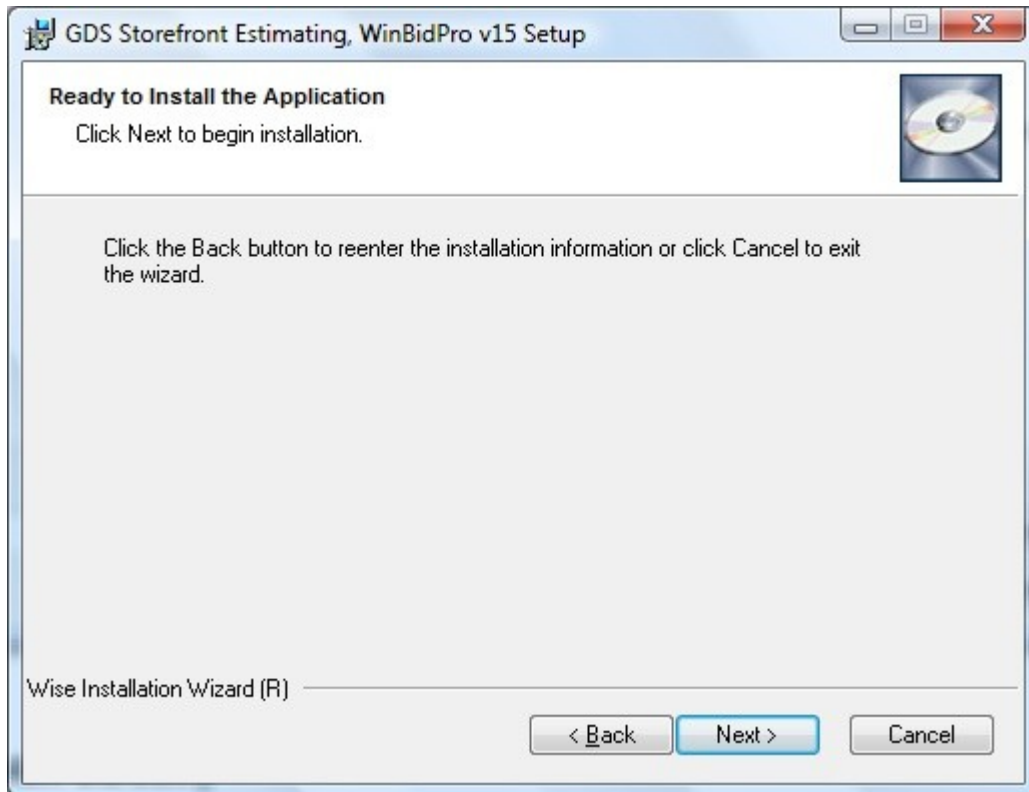
## Install Destination Folder

By default the install program will create a new folder for data files named C:\WinBidPro\ (recommended). If you would like to use an alternate location, then click the Browse button on the right and navigate to the desired location and/or create a new folder.



*Illustration 9: The default destination folder is shown, however the Browse button may be used to direct the installation to another folder.*

## Ready to Install Screen

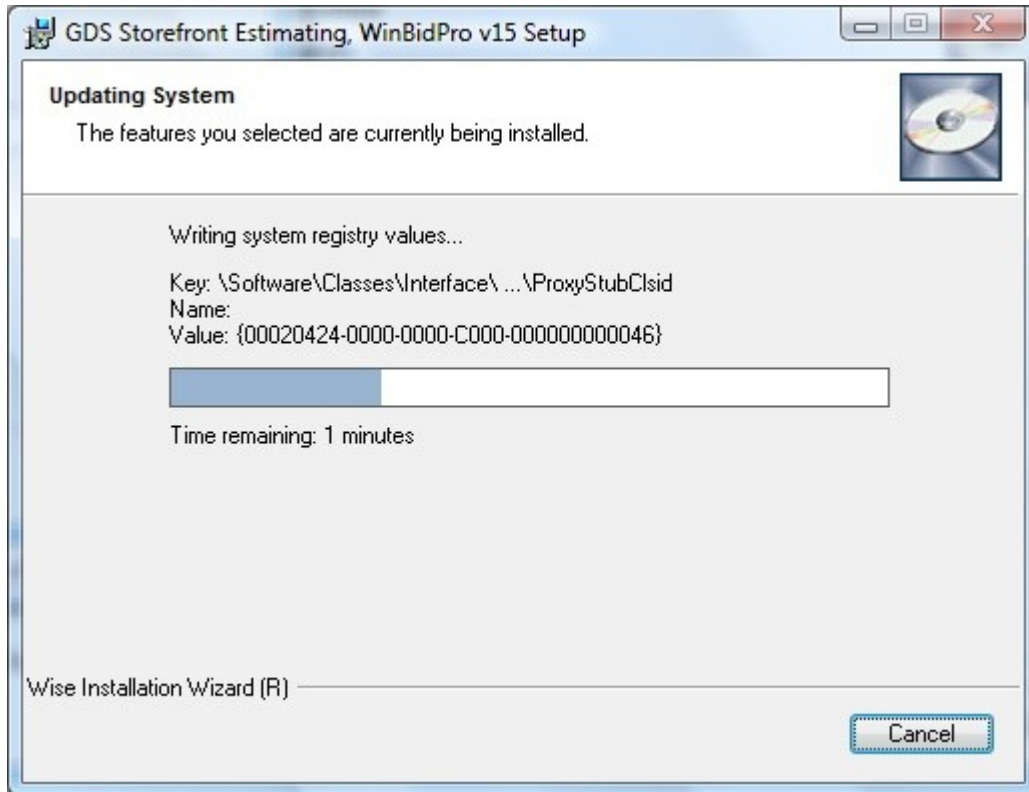


*Illustration 10: Ready to install screen. Click Next button to begin installation.*

Click Next to begin installation.

## Installation Progress Window

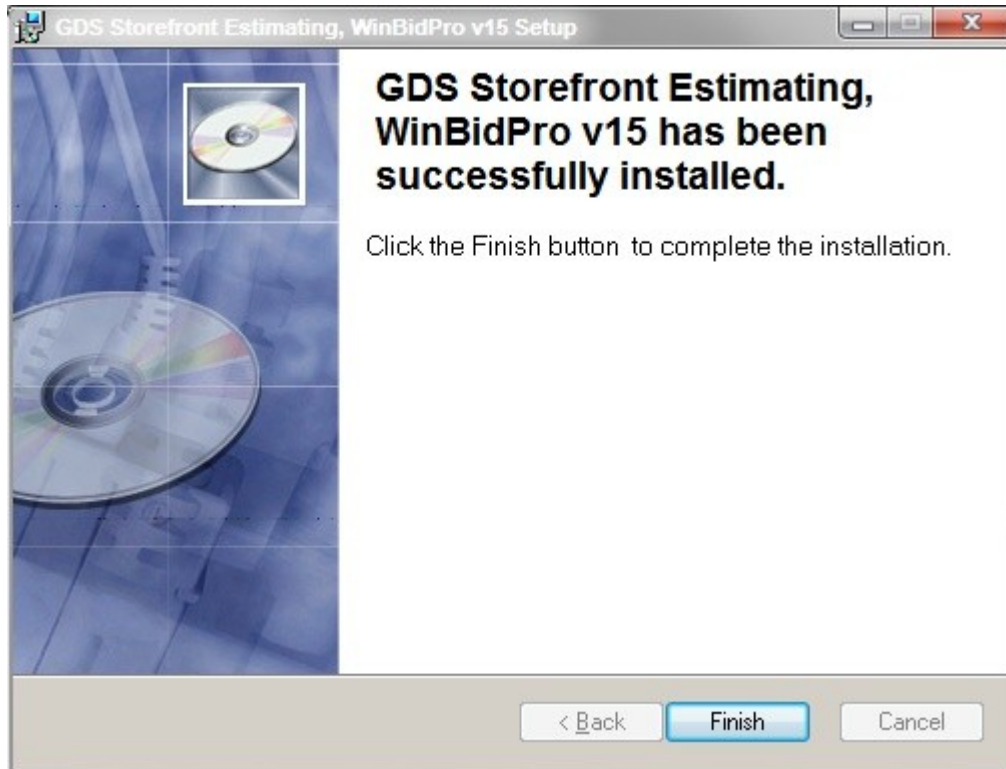
When the installation begins the Updating System window will appear while the files are being copied to the appropriate folders. This process may take a few minutes. Be patient.



*Illustration 11: The Installation Progress window will display a status bar while showing the progress of the install.*

## Installation Complete Window

Upon completion, the WinBidPro v15 success window will be displayed. When the Finish button is clicked the setup is complete and the window closes.

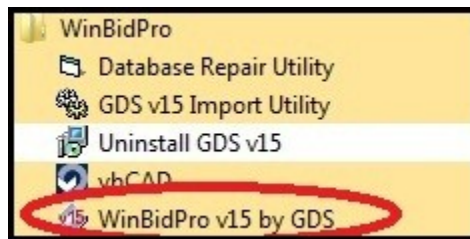


*Illustration 12: When the Finish button is clicked the window will close. WinBidPro can be launched from the WinBidPro folder in All Programs of the Start Menu.*

## Running WinBidPro V15

### How to Launch WinBidPro

#### All Programs in the Start Menu



*Illustration 13: The main WinBidPro v15 program can be found in the WinBidPro folder under All Programs in the Start Menu, unless it was saved to a designated alternate location.*

There are five programs listed under All Programs/WinBidPro on the Start Menu of your Windows computer. The main program is listed as “**WinBidPro v15 by GDS.**” Selecting “WinBidPro” from the list will launch the program. Three of the other programs are utilities:

- **GDS v15 Import Utility** is a program for converting Vendor Catalogs from version 14 (v14) to version 15 (v15) of WinBidPro.
- **Database Repair Utility** is a program for repairing the Master and Vendor databases. This program should always be located with the vendor folders.
- **vbCAD** is a third party CAD program for editing the drawings. (As this is a third party program added as a courtesy to our clients, GDS cannot provide support for vbCAD.)

The last program listed, [Uninstall GDS v15](#), is the uninstall program for GDS v15.

#### Desktop Icon and Quick Launch for WinBidPro



Upon installation an icon (as shown at the left) was placed on the computer's Desktop for launching WinBidPro v15. Double-click this icon to launch WinBidPro. To add the icon to the Quick Launch on the task bar, click and hold the left-mouse button on the icon and drag the icon onto the Quick Launch area of the task bar (or right-click the WinBidPro icon on the desktop and select “Add to Quick Launch” from the menu.). Thereafter WinBidPro will launch with one click of the Quick Launch icon.

## Launching WinBidPro From Windows Explorer

Alternatively, WinBidPro v15 can be launched from Windows Explorer by navigating to the default folder ([C:\WinBidPro](#) or assigned folder) and double-clicking the file name “WinBidPro.exe” listed in the folder.

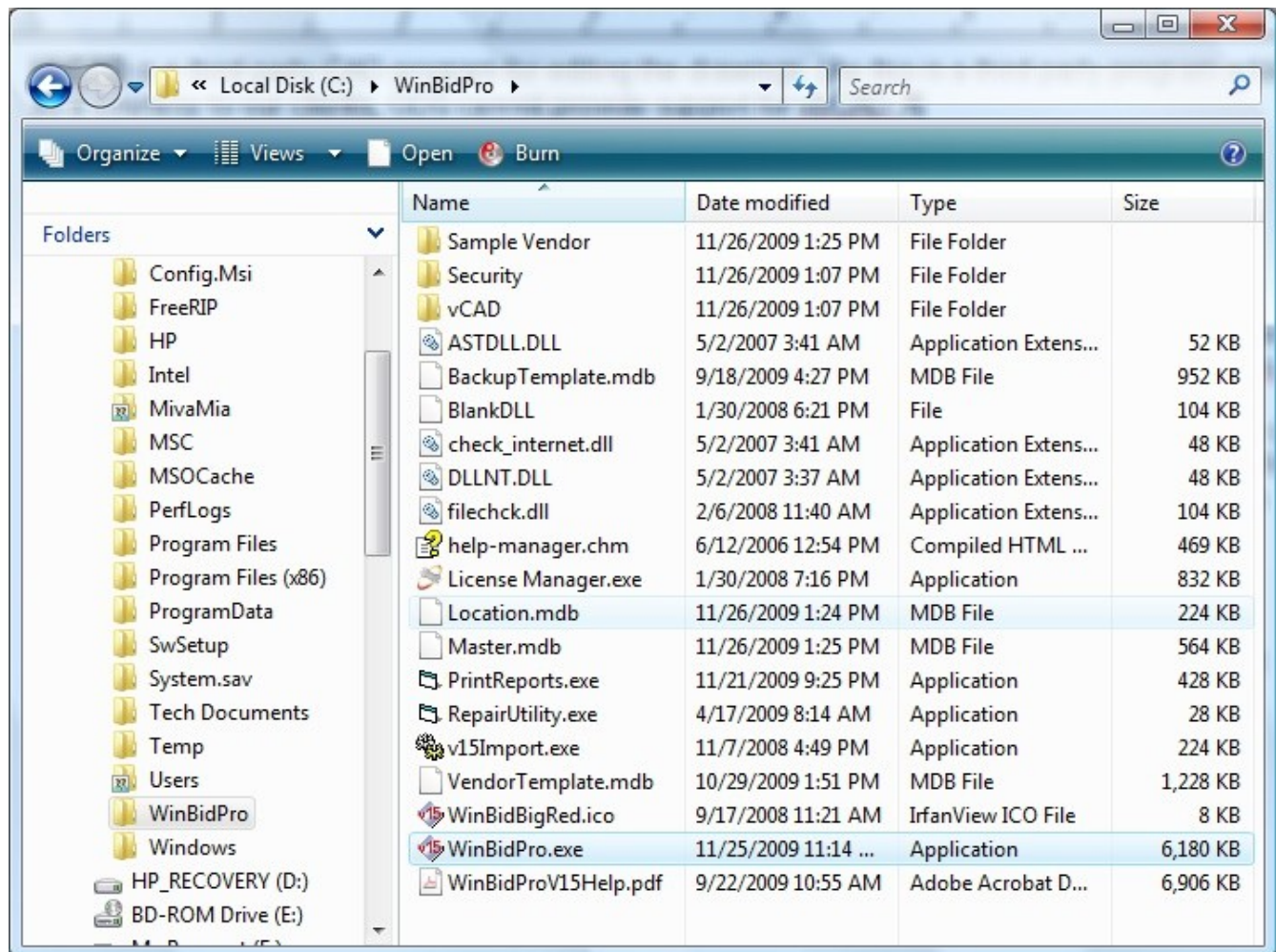


Illustration 14: Launching WinBidPro from Windows Explorer

## Using the Search Field in Windows Vista and Windows 7

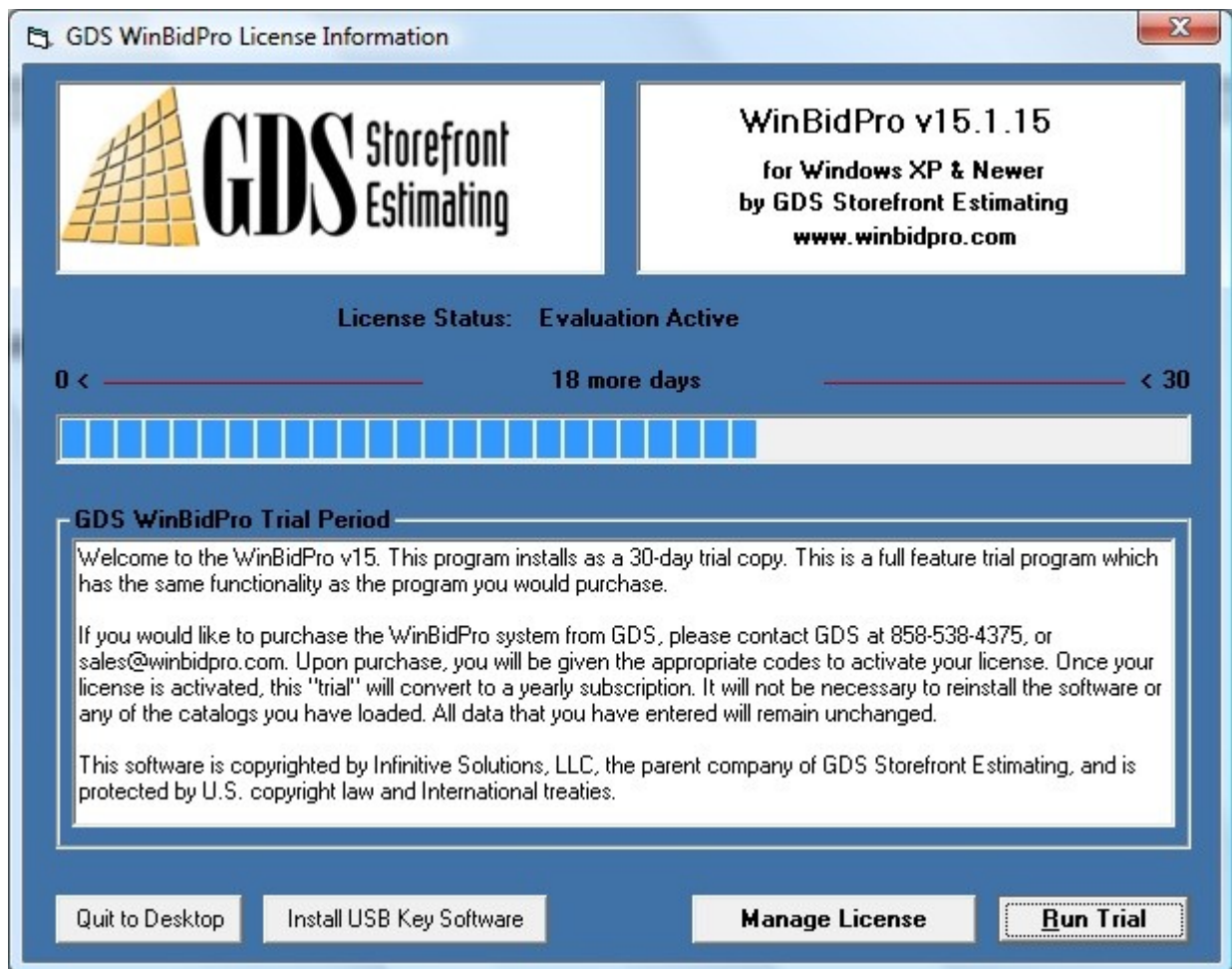
If you are using Windows Vista or Windows 7, then you can launch WinBidPro v15 by simply typing “winbidpro” in the Start Search field of the Start Menu, then selecting “WinBidPro v15 by GDS” from the programs list. (In Windows 7, the text in the search field of the Start Menu appears as “Search programs and files” rather than the “Start Search” in Vista.)



## WinBidPro Loading Sequence

### Licensing Information Screen

The first screen to appear when the “Trial” version of WinBidPro v15 loads is the “GDS WinBidPro License Information” window as shown below. Initially, all users have a free 30-day trial period to use and test the full version of WinBidPro v15 which includes all the same functionality of the program that you would purchase. This trial version automatically counts down the days. Since the program recognizes the computer upon which it is installed the days will continue to countdown even if the program is uninstalled and reinstalled.



*Illustration 15: The License Status window will continue to countdown the days until either the license is activated (call 858 538-4375) or the temporary license expires.*

If you decide that you want to purchase the program, you can obtain an activation key by contacting GDS at (858) 538-4375 during normal working hours (7:30am to 4pm Pacific Time), or sending an e-mail (include the Installation ID shown in the License Manager on your computer) to [sales@winbidpro.com](mailto:sales@winbidpro.com). Once your license is activated, the trial will convert to a yearly subscription. It

will not be necessary to reinstall the software or any of the vendor catalogs you have loaded. All data that you have entered will remain unchanged.

The “Install USB Key Software” is only for those clients who have used the hardware keys with previous versions of WinBidPro. All new clients will use the software licensing key system.

**Troubleshooting Note:** When loading WinBidPro, the program tab may not appear in the Windows Task Bar until the program has fully loaded and is displaying the elevation window. If you are interrupted during the vendor and job selection process while the program is loading, the windows may disappear behind other windows that you have just activated or opened. If this occurs attempting to reload the program will generate an error since only one copy of WinBidPro can run simultaneously. To return to the loading windows, you can either close or minimize open windows until it reappears or click the Show Desktop button (Microsoft logo key+D, it may also appear as a Quick Launch button), then click the tab for the warning window on the Task Bar or attempt to reload the program. The original loading window will appear after the warning window is displayed. If this doesn't work, then opening the Task Manager (Ctrl+Shift+Esc), selecting the Processes tab, highlighting WinBidPro.exe, and clicking End Process. Then you will be able to reload WinBidPro.

**Operational Tip:** Once you have activated the WinBidPro v15 license, the “GDS WinBidPro License Information” window will no longer appear when the program is launched. If you need to work with the “License Manager” after activation, click the link at the bottom to the menu tree on the left side of the main program as shown below.



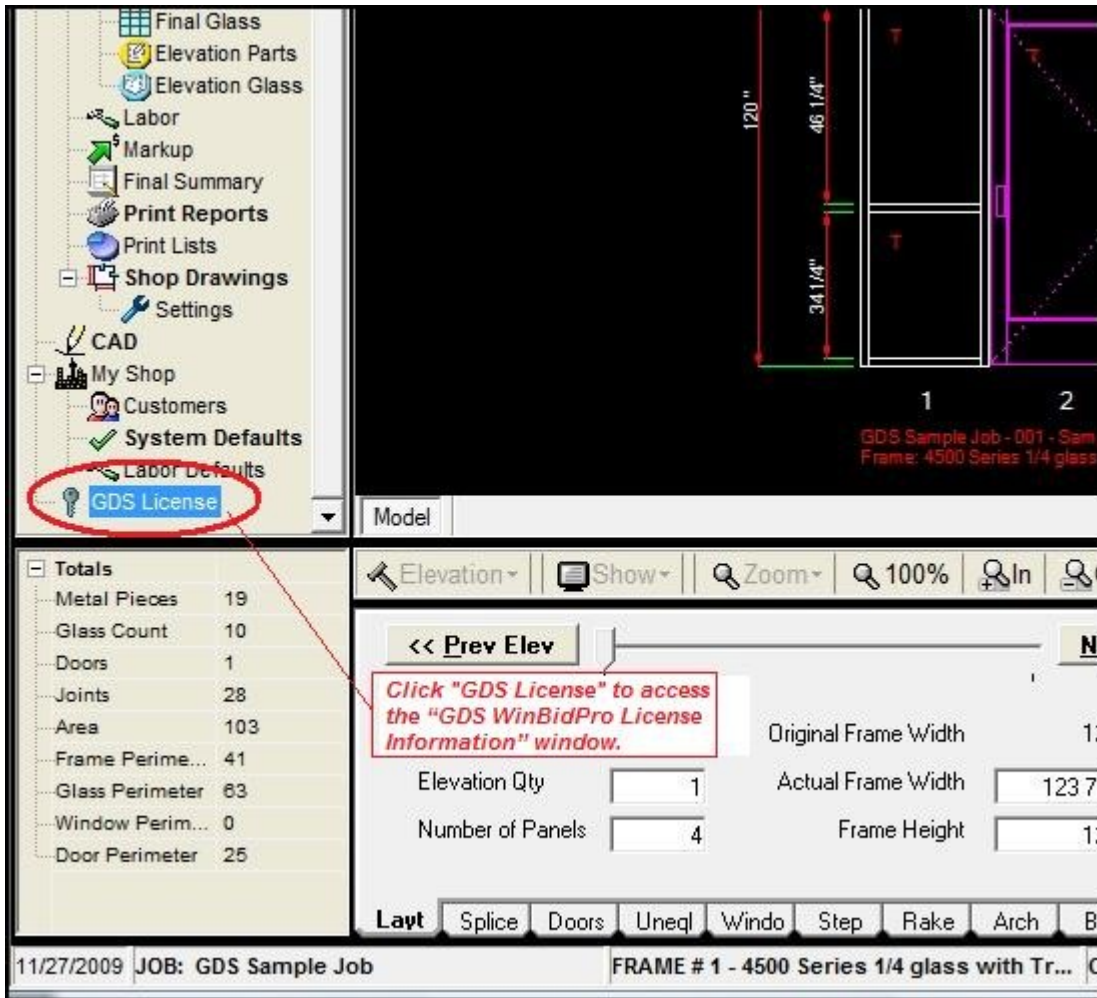


Illustration 16: The License window can be opened by clicking the "GDS License" link.

## Activating the WinBidPro v15 License

A license for WinBidPro may be activated via the phone or e-mail with your purchased activation key. (You may purchase an activation key by contacting GDS at 858-538-4375 during normal working hours (7:30am to 4pm Pacific Time), or sending an e-mail to [sales@winbidpro.com](mailto:sales@winbidpro.com).) The first step is to click the Manage License button on the GDS WinBidPro License Information opening screen shown in the previous section. Select the “Phone/Email License” button.

### **Phone and E-mail License Activation (*Preferred Method for License Activation*)**

“Phone/Email License” activation system shown below is the WinBidPro preferred method for activating the program. To get the “Unlocking Code” contact GDS at 858-538-4375 during normal working hours (9am to 4pm Pacific Time), or send an e-mail (include the Installation ID shown in the License Manager on your computer) to [sales@winbidpro.com](mailto:sales@winbidpro.com). If you use the phone method, then you will be able to activate WinBidPro during the same call when you purchase your license.



*Illustration 17: "Phone and Email License" is the preferred method for activating the WinBidPro license.*

### **Manually Move the License (*Preferred Method for Moving a License*)**

Your license is assigned to an identified computer. There are times when you may want to move that license to a different computer. Your license will need to be deactivated from the old computer and reactivated with the new computer. To manually move your license for WinBidPro v15 to a new computer you can use a USB flash drive or a floppy drive. If you have a phone/email license, this will be the method that you will need to use when transferring your license to another computer.

1. Download and install the “Trial” version of WinBidPro v15. Launch the “Trial” version of WinBidPro on the new computer, then enter the License Manager selecting “Manually Move License as shown.
  - A. Insert the removable media (USB flash drive, floppy, etc) into the new computer.
  - B. Locate the media by clicking the “Browse” button in Part 1 on the screen. A window with the drive structure will open. Select the appropriate drive, then click OK.
  - C. Click the “Initialize Media” button to the right of the “Browse” button in Part 1. “Media successfully initialized will appear in the field above Step A as shown.



*Illustration 18: To move a WinBidPro license to a new computer, "Move a License" is the preferred method.*

2. Next move the removable media to the old computer and repeat Steps A through C for Part 2. in the window clicking the “Move to Media” in the last Step. . The new message “License moved to new media” will appear in the results field above.
3. Reinsert the removable media into the new computer and repeat Steps A through C for Part 3 of the “Move the License.” This will activate WinBidPro on the new computer.

### ***Internet Activation and Deactivation***

Although “Internet Activate” and “Internet Deactivate” appear as options, they are no longer available for activating or deactivating WinBidPro licenses. Please contact GDS at 858-538-4375 for more information or if you have a previously issued Internet activation code.

### **Permanently Remove WinBidPro License**

The “Remove License” button is only used to permanently remove (and destroy) the WinBidPro license. In this situation, you will not be able to install the license on a new computer nor reuse it. This would only be done in the case of activating a new licensing system as instructed by GDS. **Do not use this “Remove a License” feature without direct instructions from GDS.**

To remove the license, simply click the “Remove License” button. The “installation ID” and the “Proof of removal code” will appear in the appropriate fields. If requested to do so, send these to GDS as proof of deactivation of the WinBidPro license.



**Illustration 19: Do not "Remove a License" without instructions directly from GDS.**

## The Login Window

### ***GDS Storefront Estimating v15 Login Window***

The next window seen when WinBidPro is loading is the “GDS Storefront Estimating v15 Login” window, as shown below. Initially, the default user name is “Guest” as seen. If there is only one person using WinBidPro then you may continue using the login name “Guest”, however since every job that you start will use the User Name listed under estimator on the Job List for a particular vendor, it is best to create a new User Name (Edit/Add) for yourself and anyone else using the same files. If the program is installed on a network, then a User Name should be created for each user.



*Illustration 20: Login window when WinBidPro loads. Create a new user name with the Edit/Add button.*

## Creating a New User Name

To create a new User Name, click the Edit/Add button. The following screen will appear:

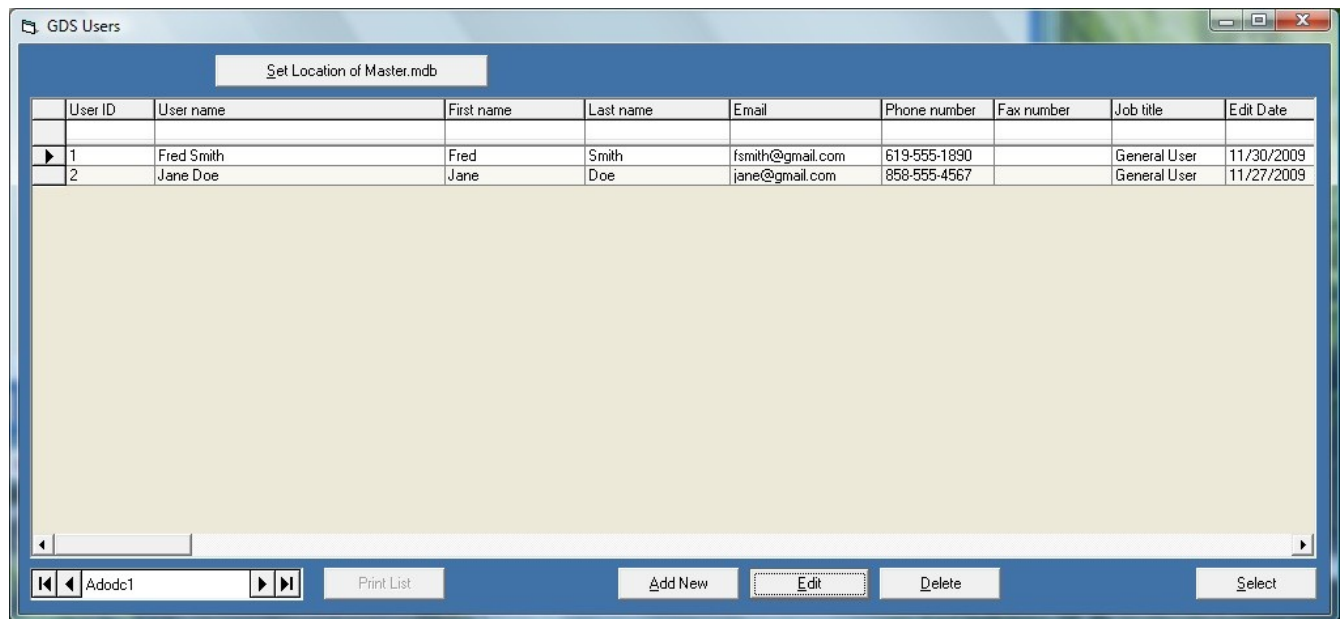


Illustration 21: When the Edit/Add button is clicked, the GDS User window will open.

The first time WinBidPro loads, "Guest" will appear as the only entry. You can either "Edit" the "Guest" entry with your own information, or you can click the "Add/New" button to create a new user. When you click either the "Add/New" or "Edit" button, the following screen will pop-up.

Note: If you later decide to edit or add a new user after the program is loaded, you will need to close and reopen WinBidPro to access the login screen.





The screenshot shows a standard Windows-style dialog box titled "Add a new user". It features a blue title bar with minimize, maximize, and close buttons. The main area is white with a blue border. It contains eight text input fields arranged vertically, each with a label to its left. The fields are: "First Name:" with "Jane", "Last Name:" with "Doe", "User Name:" with "Jane Doe", "Password:" which is empty, "Email:" with "jane@gmail.com", "Phone:" with "858-555-4567", "Fax:" which is empty, and "Job Title:" with "General User". At the bottom right, there are two buttons: "OK" and "Cancel".

*Illustration 22: The add a new user window is used for both adding and editing user information. This window can only be accessed when loading the WinBidPro program.*

Fill in the First Name and Last Name fields. When you tab or move the cursor to the User Name field, the First and Last Name will automatically be combined and added to the User Name field. Fill in the rest of the fields as appropriate. Click OK to save and close the window. In the GDS Users window, select the appropriate name and click Select. You will be returned to the Login window with the name selected. Click OK to move on to the vendor selection window.

### ***How the User Name is Used***

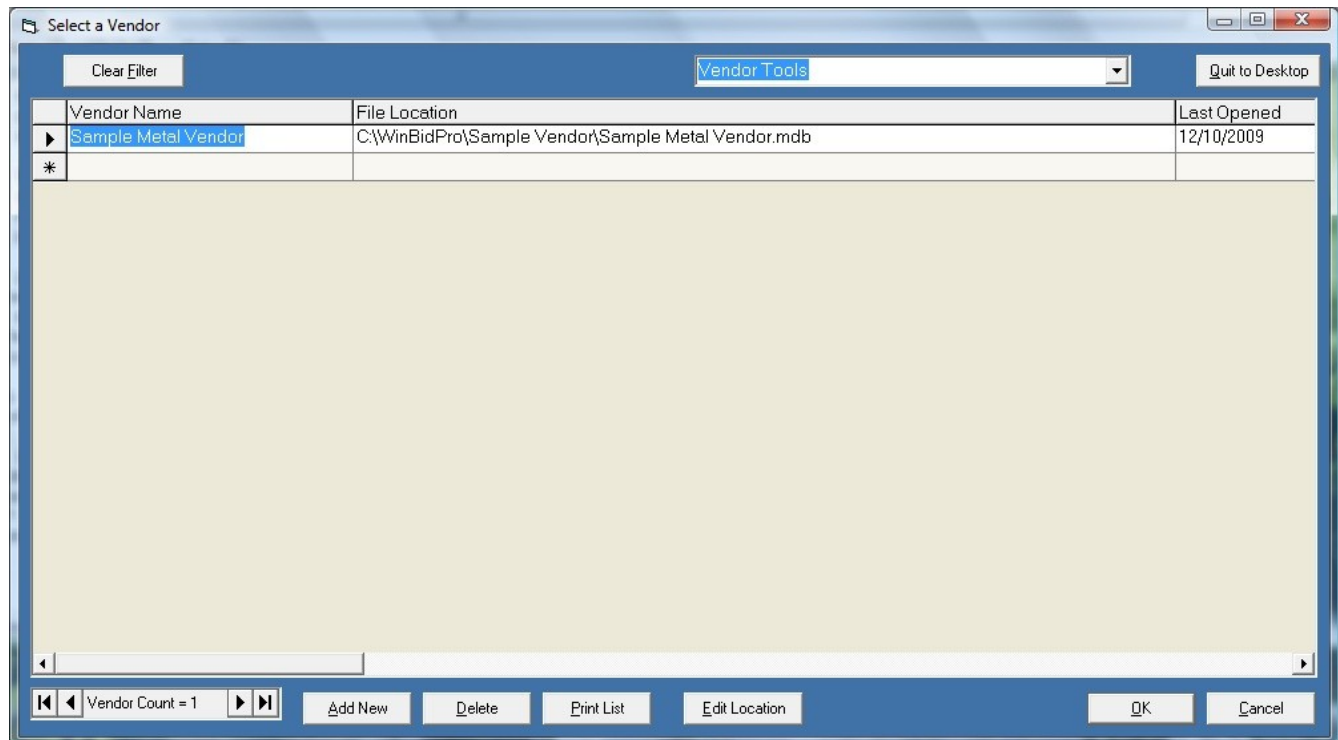
The user name is important for a number of reasons. First, this name identifies the estimator for a job. As new jobs are created, the user name is automatically added as the estimator's name. This name can be changed in the Job List window, but any new job created will always start with the user name as estimator.

Second, the System Defaults, such as default rates, are associated with the selected user. Different users may have different rates and program loading defaults, so it is necessary to set these System Defaults preferences for each new user created.



## Select a Vendor

The Select a Vendor screen is the next window to open. Since all projects in WinBidPro are vendor oriented, the first step in any project is to select the desired vendor. Unless you have previously [downloaded and installed the vendor catalogs](#), the only vendor to appear will be “Sample Metal Vendor” which is part of the initial installation. Once you have installed other vendor catalogs, they will appear in this list. Select the appropriate vendor and click OK. (After the first loading of WinBidPro, you may skip the Select a Vendor window when loading by selecting “Automatically Open Last Vendor” in the System Defaults screen access in the left-hand navigation panel in the main program. These defaults are saved separately for each user name.) Once WinBidPro is selected, you can change the vendor by clicking Vendors in the left-hand navigation panel.



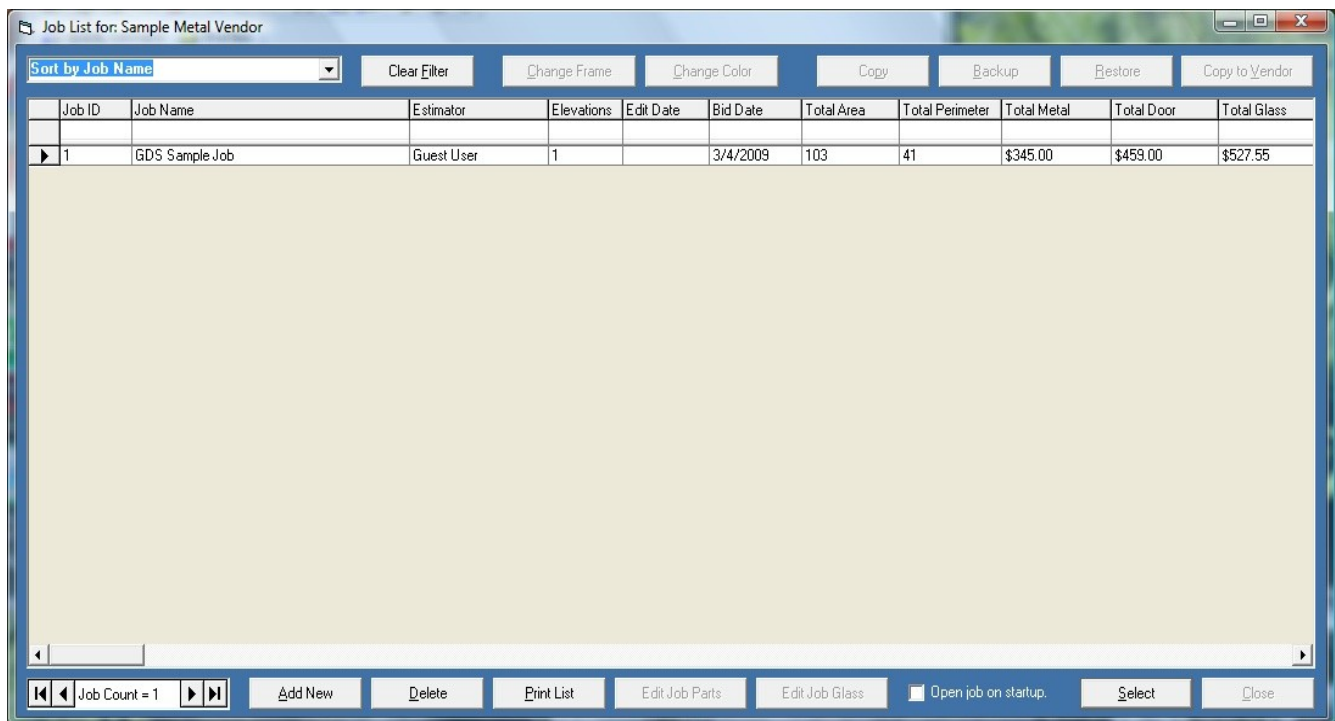
*Illustration 23: The Select a Vendor window is presented when loading WinBidPro. The vendor selection can be changed after loading WinBidPro by clicking Vendors in the left-hand navigation panel.*

## How Vendors are Used

Every job/bid is associated with one particular vendor. If you change vendors, then you will be changing to or creating a new set of jobs which will be associated with the new vendor. The vendor is the top level of the bidding process. Jobs are a subset of the selected vendor and elevations are a subset of the selected job. The Vendor Catalog needs to be downloaded and installed to appear in the Select a Vendor list.

## Jobs List

The next screen in the loading sequence is the Job List. The second step in every project is creating a job for the selected vendor. Initially, the only job to appear on the Job List will be the “GDS Sample Job” which is part of the WinBidPro installation. As you add jobs for a selected vendor, they will all appear in this screen. (Once you have started a job, you can set the program to default to that job by checking the “open job on startup” box at the bottom of the window. thereby skipping this window on program launch. This may also be done by making the selection in the System Defaults screen in the main program. The Job List is always available in the program screen by clicking the Jobs link in the left-hand navigation panel.)



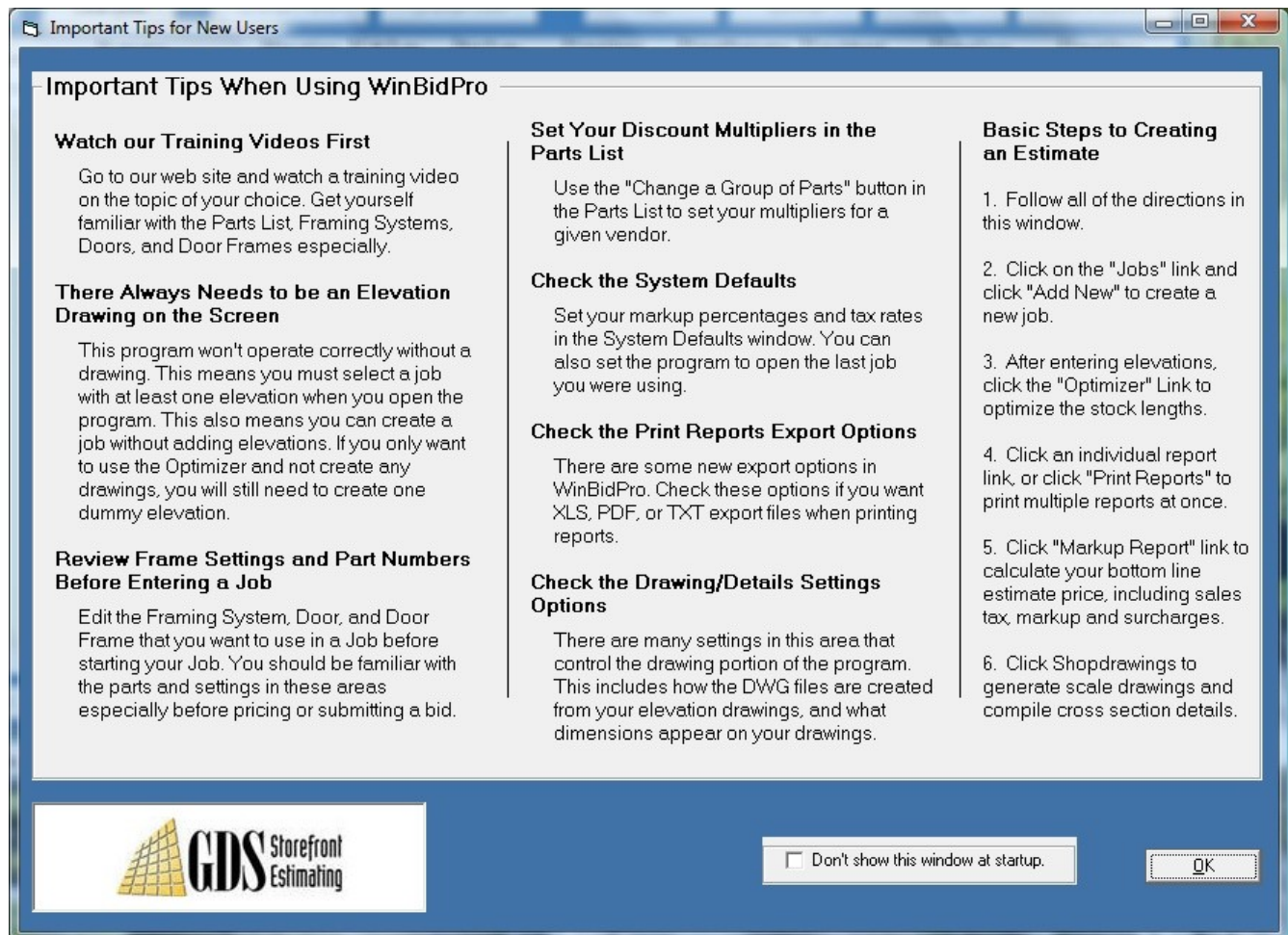
*Illustration 24: The Job List windows list all of the jobs for a selected vendor. This window may be bypassed by making the appropriate selection in the System Defaults window.*

### How Jobs are Used

Each job is a separate project or bid for the selected vendor. Within the job are all the elevations, framing systems, entrances and parts necessary to bid and complete the job. When working with WinBidPro one Job is selected for one vendor at a time.

## WinBidPro New User Tips Screen

The last window to open before the final loading of the WinBidPro main window is the "Important Tips for New Users" screen. If you're a new user of WinBidPro v15 or have just upgraded from WinBidPro v14, then you should review this screen.



## New User Tips

1. The GDS WinBidPro site includes how-to videos at <http://www.winbidpro.com/TrainingVideos.htm> to help you better understand the program features and how they work. The short period of time it takes to view the videos will familiarize you with the Parts List, Framing Systems, Doors, and Door Frames which are of particular importance in WinBidPro v15.
2. There will always be at least one elevation associated with each job. When you create a new job, you will select a Framing System from the manufacturer's list. An elevation with no panels and no dimensions will be automatically created. In order to continue, you must enter the number of panels, height, and width of the desired elevation. If you want to only use the

Optimizer, then you can proceed with a dummy elevation that is as simple as one panel, 24" high by 24" wide.

3. Review frame settings and part numbers before entering a job. Having the correct information in the parts lists are critical to accurate pricing and bids. Manufacturers often make changes that may not be reflected in the catalogs. You should check the parts and settings in these areas before pricing or submitting a bid.
4. Set your discount multipliers in the Parts List. Use the "Change a Group of Parts" button in the Parts List to set your multipliers for a given vendor.
5. Check the System Defaults. Set your markup percentages and tax rates in the System Defaults window. You can also set the program to open the last vendor and job that you were using.
6. Check Print Reports Export Options. There are some new export options in WinBidPro v15. Check these options if you want XLS, PDF or TXT export files when printing reports.
7. Check the Shop Drawing/Settings Options. There are many settings in this windows that control the drawing portion of the program. This includes how the DWG files are created from your elevation drawings and what dimensions appear on your drawings.

### ***Basic Steps to Creating an Estimate***

All of these steps refer to links in the left-hand panel of the WinBidPro v15 program proceeding from top to bottom:

1. Select a vendor/manufacturer from the Select a Vendor screen. (Click the "Vendors" link and select a vendor.) If the vendor you plan to use is not listed, then see [Importing Vendor Catalogs](#).
2. Click on the "Jobs" link and click "Add New" to create a new job.
3. After entering elevations, click the "Optimizer" link to optimize the stock lengths.
4. Click an individual report link, or click "Print Reports" to print multiple reports at once.
5. Click "Markup Report" link to calculate your bottom line estimated price, including sales tax, markup and surcharges.
6. Click "Shop Drawings" to generate scale drawings and compile cross section details.

### **WinBidPro v15 Main Screen**

When WinBidPro completes loading, you will see the [WinBidPro v15 main screen](#). This central window accesses all the capabilities of the program providing a central elevation display and all the tools required to complete your bids.

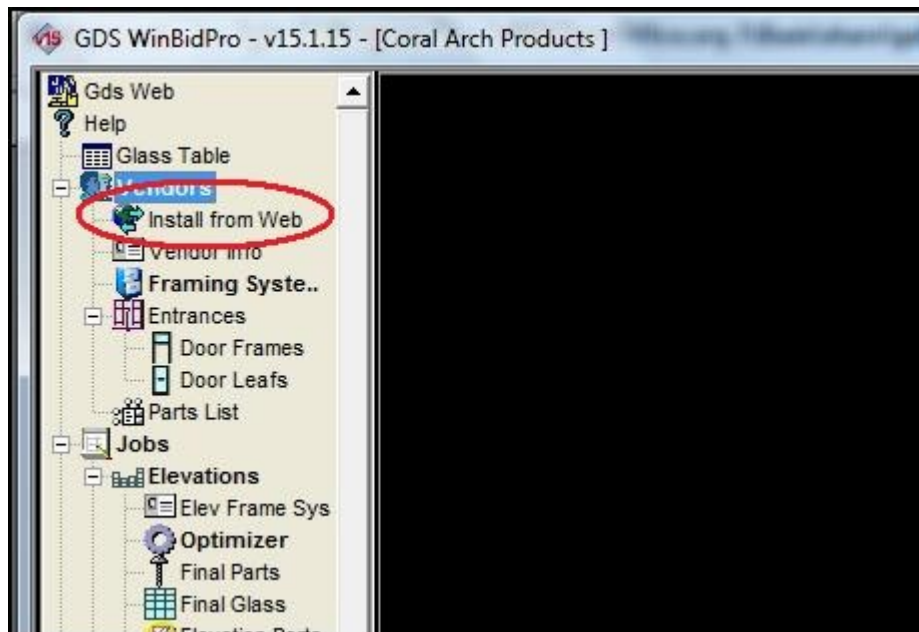
## Vendor Catalogs

Much of the power of WinBidPro v15 is in the extensive vendor catalogs of the parts and packages offered by storefront and curtain wall fabricators and manufacturers which make it easy for bidders to draw upon these vendor databases by plugging in their client specifications. These individual supplier catalogs detail the parts and materials which are required to design and bid storefront and curtain wall projects, automatically drawing elevations, optimizing material cuts, and calculating bids.

WinBidPro utilizes one selectable vendor catalog at a time for each project. Each catalog may be individually tailored by the user for the needs of the bid. While GDS works to update the vendor catalogs on a regular basis, GDS cannot guarantee the accuracy of the data provided. All bids should be checked for accuracy with the manufacturers since changes, which may not appear in the catalog, are regularly made by vendors. Changes made to vendor catalogs will immediately appear on all active bids which include that vendor.

### Downloading V15 Vendor Catalogs

Only the Sample Metal Vendor is included with the initial installation. The current vendor catalogs are available for download at <http://winbidpro.com/v15Vendors.htm>. (There is also a feature for accessing the Web site and downloading the vendor catalogs within the running WinBidPro program. See the Figure below.)



*Illustration 25: Vendor catalogs may be downloaded and installed by clicking the "Install from Web" link in the left-hand navigation panel.*

There are two lists on the GDS Web site Vendor Catalog page. The top list, "Newly Configured v15 Vendor Catalogs", includes the current v15 catalogs incorporating the latest WinBidPro capabilities. These catalogs take advantage of the package features of WinBidPro v15. A package (such as an

entrance) is one item which, when included in an elevation, will pull in all the associated parts (nuts and bolts) which complete the package for bidding and ordering.

The second list, "Imported Catalogs from v14", includes the older catalogs ported over from v14. While these catalogs may be edited to create packages, they will not have detailed door and entrance configurations found in the v15 catalogs.

To download a vendor catalog for WinBidPro v15, click on the desired link. Depending upon your browser type and setup, you may get a warning asking you to give permission to download the file. Answer "Save", "Save File", or "Run" as appropriate and continue.

In Internet Explorer you will see the option to "Run" or "Save." If you select "Run", the installation of the vendor file will begin immediately after the download. If you click "Save", then you will need to run the downloaded file after saving. (This can be done by double-clicking on the appropriate file name in Windows Explorer in the appropriate folder.) You should respond to all warnings with permission for the process to continue.

In Firefox, after the file has downloaded, select it in the open Downloads window and click Open. You may get a warning about the file type. Click "OK" to continue. You may get a systems warning from Windows. If so, click "Allow" to continue. The catalog install will begin as shown below.

Other Web browsers will operate in a similar fashion—usually with an option to either "Save" the file or "Run/Open" the file.



## Installing Vendor Catalogs

When the downloaded vendor file is “Run” or “Open” the program will create a folder in the default directory for WinBidPro and install the appropriate catalogs and files. Once this is done, that vendor should appear in your list of vendors which opens when Vendors is selected in the left-hand WinBidPro navigation panel. If you reinstall the catalog (run the program more than once), the program will not overwrite the original files. This is to protect any changes that you may have made to a previously installed catalog. However, if you want a new catalog installation (of the same name and version), then you should rename the catalog folder to a backup name. Plus, you will need to remove the existing Vendor name from your Vendor list. Then, the new catalog will install.

## Welcome Screen

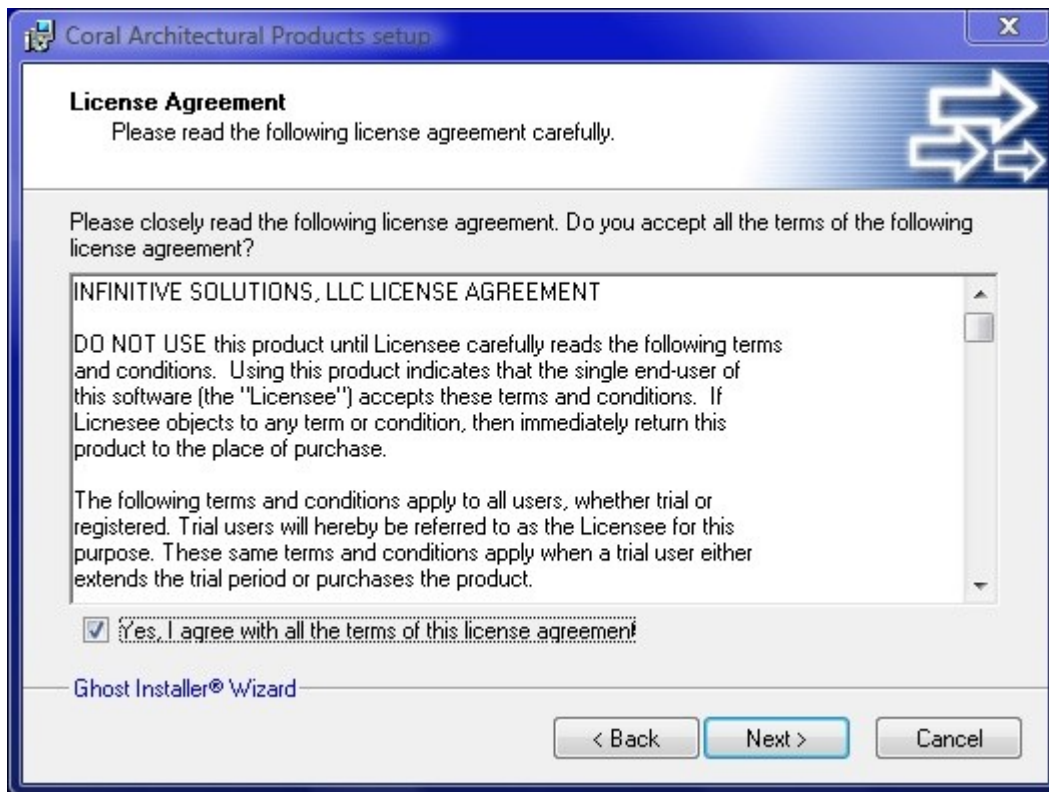
The first screen in the vendor catalog installation is the Welcome Screen. Although in most cases you should be able to install the catalogs with other programs open, if you run into problems with the installation, close all other programs and try again. Click Next to continue, Cancel to stop the installation.



*Illustration 26: Welcome screen for a vendor catalog installation.*

## License Agreement Screen

On the License Agreement, read the license agreement and check the box “Yes, I agree with all the terms of this license agreement. Click “Next” to continue.



*Illustration 27: License Agreement Screen for a vendor catalog installation.*



## The Readme Information Screen

As opposed to what this readme window says, at this time, the installation does not create a new folder with an incremented number. If the program sees the files already installed, it does not attempt to overwrite the old files.

If you want a new catalog installation of the same name and version, then you should rename the old catalog folder to a new name. Plus, you will need to remove or edit the existing Vendor name from your Vendor list. Then, the new catalog will install. At that point, you may edit the old vendor catalog entry (if not previously deleted) in the Vendor List to reflect the new path to the old catalog.

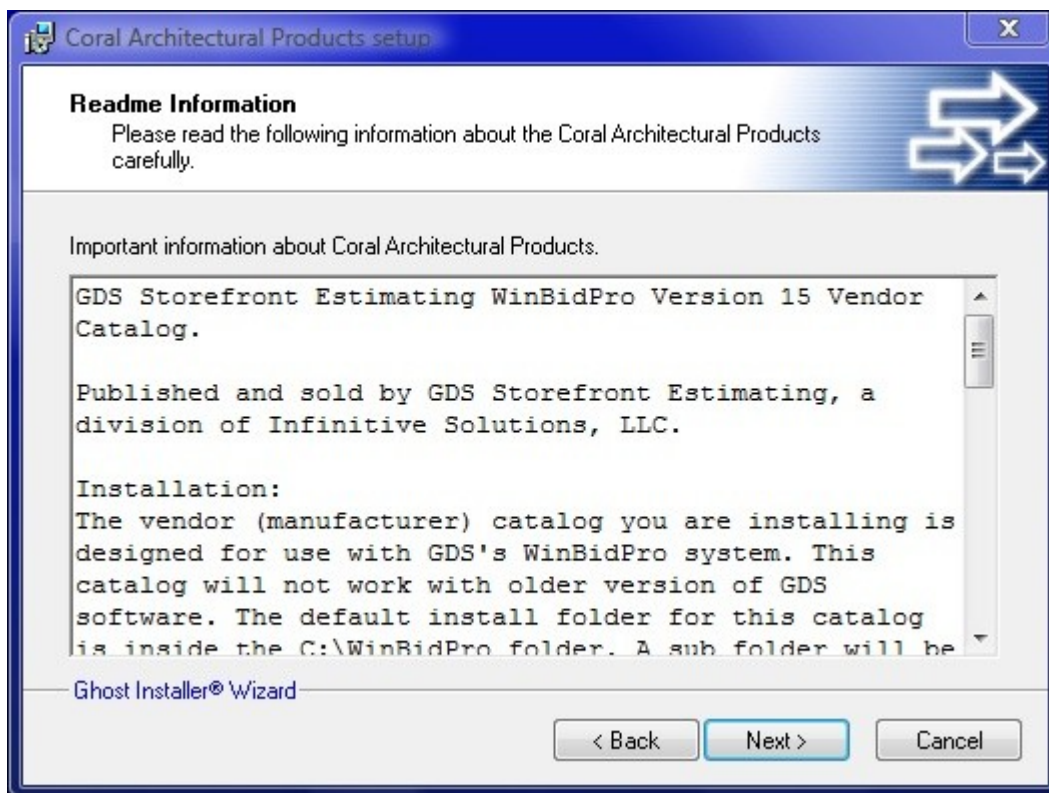


Illustration 28: Readme Information Screen.

## Installation Destination Folder

The Destination Folder window will normally default to the WinBidPro directory. However, you may locate the catalog in any directory you designate. If you decide to place the vendor catalog into a different folder, you can either type in the complete path of the new folder—the folders will automatically be created, or use the browse button on the right to locate the appropriate folder. Be sure to type in a vendor name for any new subfolder to be created in the new path (i.e. C:\WinBidPro Vendors\New Vendor Folder). (Be sure to use the backslash “\” to separate the top level folder from the named vendor folders.)

The Vendor Catalog Install program will not overwrite previously installed catalogs in the same folder. If you plan to reinstall a catalog from a previously installed vendor, then you will need to either delete the previously installed catalog files directly from the drive and remove the existing Vendor name from the Vendor list, (you will lose any changes you have made to the catalog), or designate a new folder for the catalog installation as described in the previous paragraph.

Note: If you inadvertently attempt to reinstall the same vendor more than once, the catalogs files will not be overwritten. If you install an newer version (update) of an existing catalog in you system, a new database will be copied to the same vendor folder, and any new detail files will be copied. Existing detail files will not be overwritten. The new catalog name will be added to your vendor list, and the old catalog will remain in the list and on your system.

Click “Next” to continue.

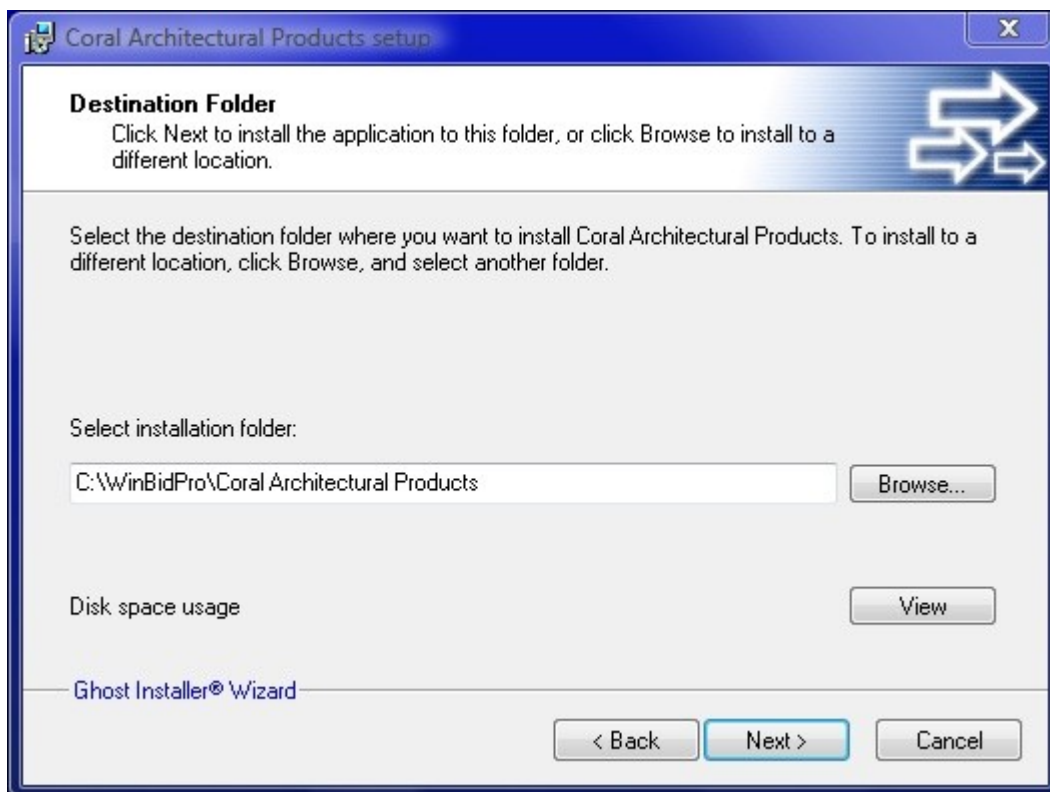


Illustration 29: Selecting the destination folder for a vendor catalog.

## Installation Ready to Install the Program

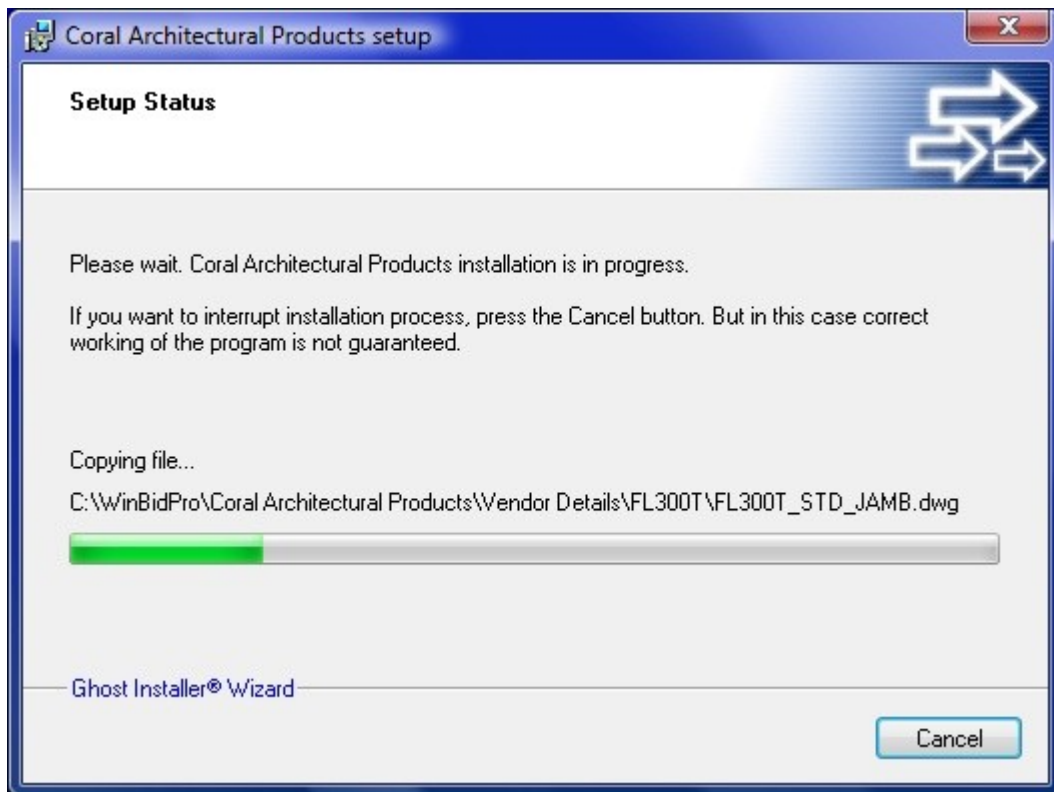
In the Ready to Install the Program windows either click “Next” to begin the installation, “Back” to select the destination folder, or “Cancel” to abort the installation.



*Illustration 30: When ready to install WinBidPro click Next.*

## Installation Setup Status Window

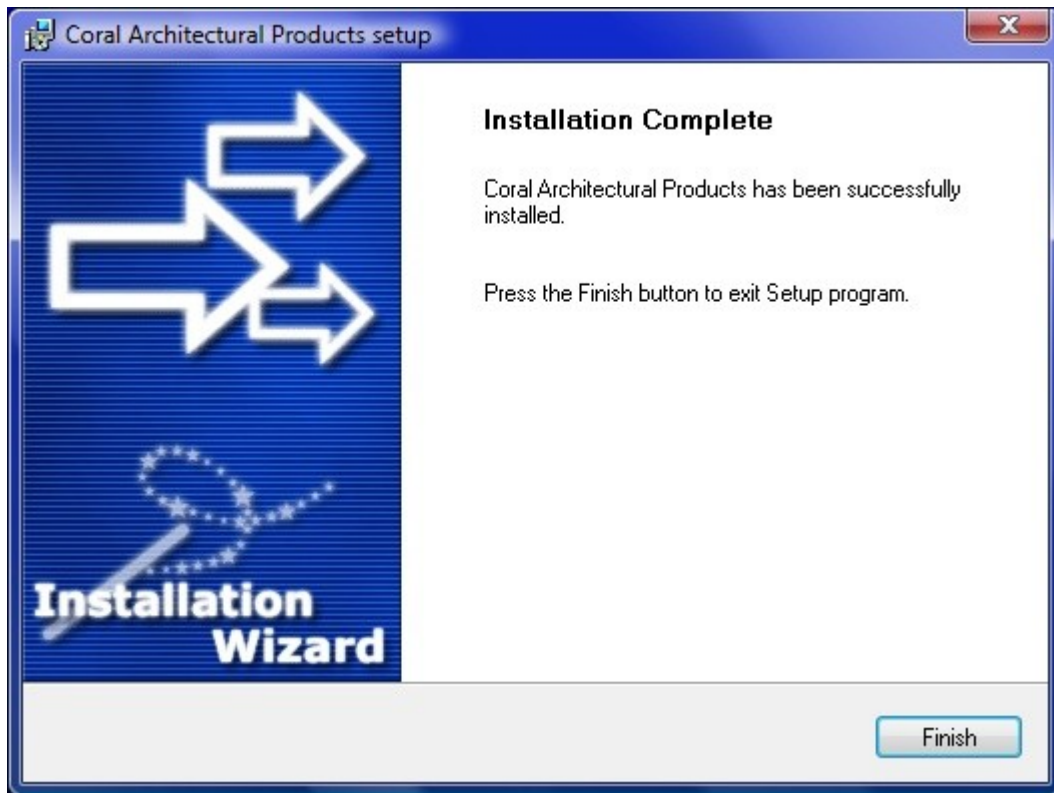
As the vendor catalog is installing the “Setup Status” window will be displayed showing the progress of the installation. Upon completion the “Installation Complete” window will be displayed.



*Illustration 31: The Setup Status windows displays progress of the installation while the files are copied onto the computer.*

## Installation Complete Window

Click “Finish” in the Installation Complete window and the Vendor Installation Program will close.



*Illustration 32: Upon completion of the vendor catalog installation click Finish.*

Once installation of a WinBidPro vendor catalog is complete, the vendor will appear in the Vendor List in the WinBidPro program. (Click Vendors in the left-hand navigation pane of WinBidPro to open the Vendor List.)

## Vendor Catalog File Location

To locate the vendor file on the hard drive in Windows open Windows Explorer (hold down the Microsoft logo key and hit “E” or select from “All Programs/Accessories/Windows Explorer” in the Start Menu) and navigate to the “[C:\WinBidPro](#)” folder (or the designated folder). Each installed vendor catalog should have a folder listed under the main folder. If you have installed the catalogs at a new location, they can be found by locating the path listed in the WinBidPro Vendor List.

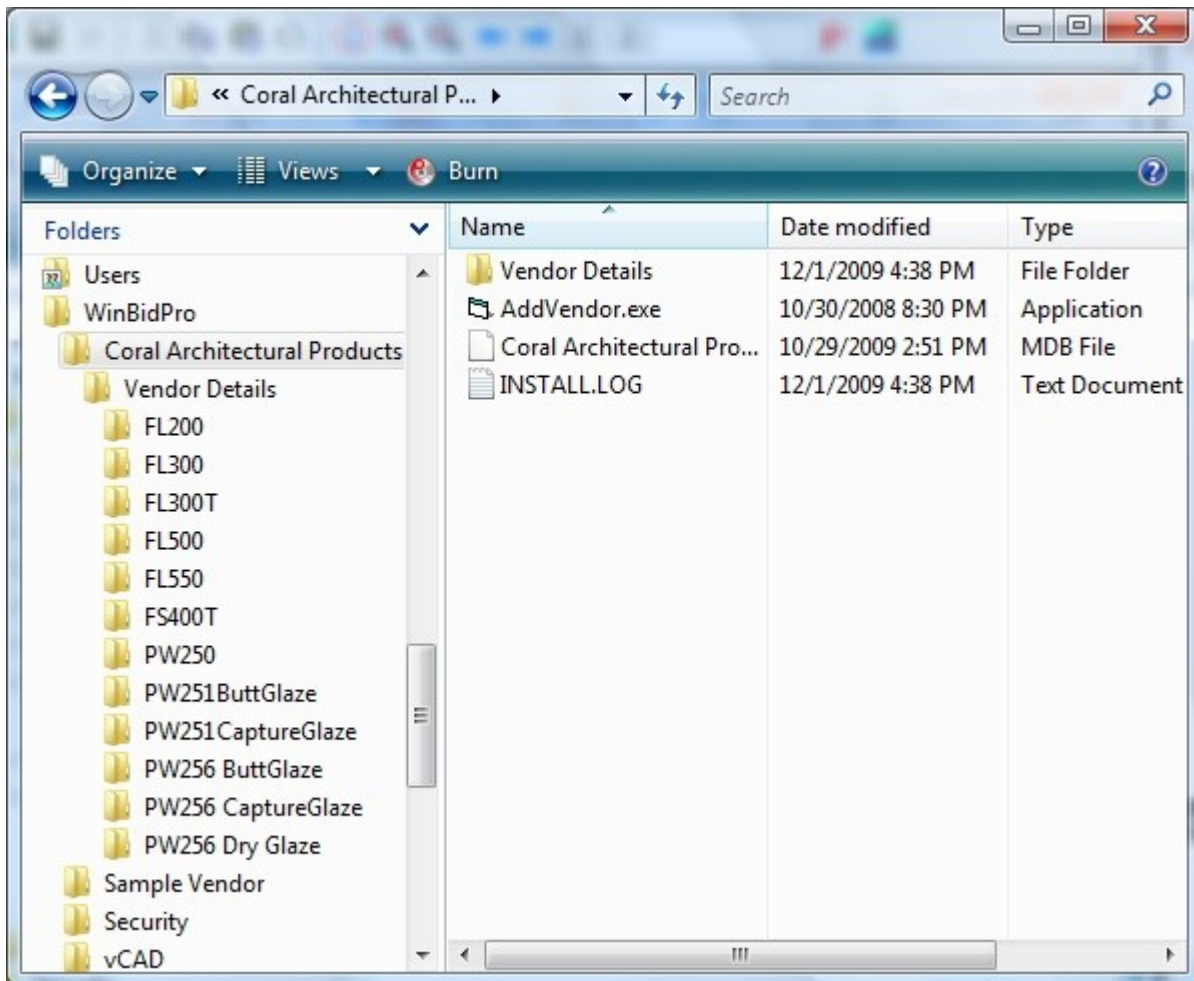
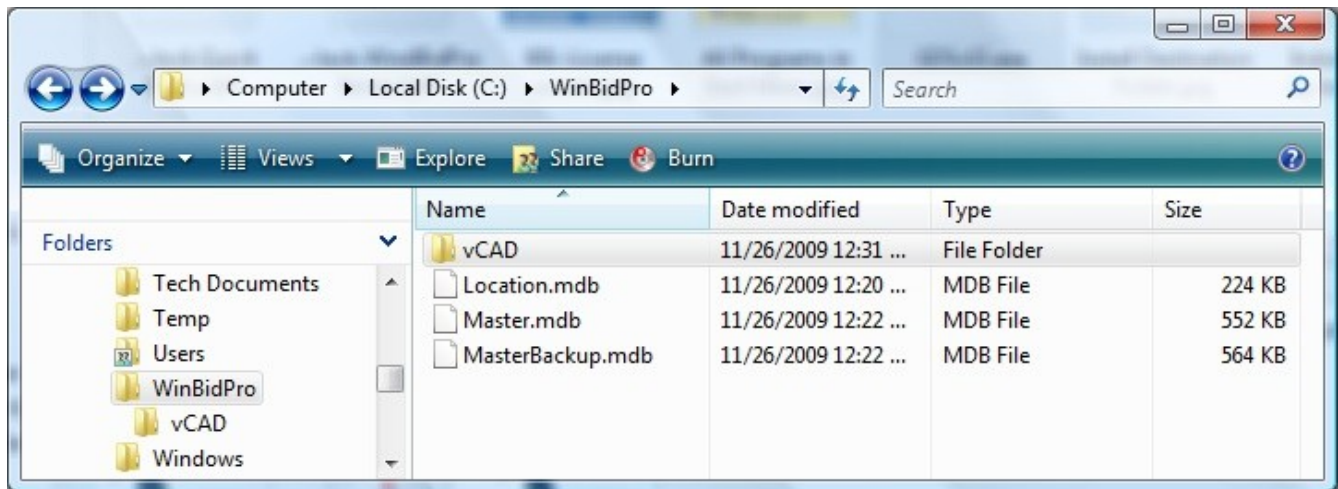


Illustration 33: The default location for vendor catalogs is C:\WinBidPro\.

## Uninstalling WinBidPro

The uninstall program for WinBidPro v15 can be found in under All Programs\WinBidPro in the Start Menu. When it is run, the uninstall will remove the main programs, but leave all the data files intact. The program will no longer appear in All Programs. However, if you want to remove the data files folder which were created upon installation, you will need to use Windows Explorer to navigate to that location ([C:\WinBidPro](#) or location assigned upon setup), then delete the folder by selecting the WinBidPro folder and hitting the Delete key.



*Illustration 34: Default location of WinBidPro file in Windows Explorer*



## WinBidPro v15 Makes It Easier

Critical to making the process of bidding and winning more jobs easier is understanding how WinBidPro is designed to help you. The process follows the natural progression from entering the client's requirements to the final output of elevation drawings, parts and glass lists, and accurate costing producing a winning and profitable bid. After the bid is won, the resultant plans and drawings can be used to produce the final product. To do this WinBidPro steps you through the process.

### Select a Vendor for the Job

First, you select the vendor that you feel will offer you the best opportunity to win and perform on the job. WinBidPro includes free detailed catalogs for download from all the major storefront and curtain wall framing systems manufacturers. These catalogs are critical for the automatic inclusion of the details necessary for an accurate bid. (Catalogs can be downloaded and installed from the GDS Web site.)

### Create Elevation Drawings

As you input the elevations for the job with WinBidPro's easy-to-use Elevations Layout screen, the framing systems, entrances, and other details with all their associated components are automatically pulled from the vendor catalog into a new, separate job's parts list. This new job parts list becomes the basis for the entire job. Once this job parts list is created for the new job, WinBidPro will only go back to the vendor catalog when you add something new. Otherwise, all the changes made to the job parts list will be dedicated to the job and unaffected by changes made to the vendor catalog for future jobs. This means that once set up, each job can be completely tailored on a case by case basis.

### Let WinBidPro v15 Do the Rest

Once the elevations include all of the client's details, WinBidPro will do the rest. CAD drawings and final parts lists are generated. Parts price multipliers applied and labor costs are calculated. Metal cut parts are optimized for the least amount of scrap and the optimum number of stock lengths. The Markup Report (final bid for the client) can be edited and printed and submitted to the client for review.

After you win the bid, The elevation can be updated in WinBidPro with the final specifications from the job site. WinBidPro will print all of the lists for ordering parts and glass. CAD drawings, which can be tweaked with the CAD program included in WinBidPro, can be generated for use on the job site for your client and the job's architects.

### How WinBidPro v15 Works

Understanding what WinBidPro does while your are working on a bid will make it easier to create and modify your jobs. The drawing below shows the flow of data in WinBidPro.

## Your First WinBidPro v15 Project

The WinBidPro program incorporates the natural progression of the construction bidding and estimating process. Bids are vendor oriented in that the starting point is always the selection of a specific vendor. From that point, individual estimating jobs are created for that vendor with the appropriate associated elevations being designed within each job. WinBidPro tracks each job with all the elevations, optimizing materials, producing bids, and creating drawings.

## WinBidPro Screen Layout

The main window of the WinBidPro program is designed for maximum convenience while creating storefront, curtain wall, or ribbon wall elevations for optimizing, bidding and ordering. The window is divided into four main areas as shown in the Figure below.



Illustration 35: The main window of WinBidPro is divided into four main areas for easy design and data input.

### Elevation Drawing Pane

The largest portion of the window, located at the top and to the right, is the Elevation Drawing window which displays the drawing for the selected elevation. As changes are made to the details of the

elevation, they are updated in the Elevation Drawing whenever the special redraw/add buttons are clicked in the Elevation Editing Pane just below at the bottom of the screen.

### **Elevation Editing Pane**

Located below the Elevation Drawing Window is the Elevation Editing Pane. This pane consist of three parts: the Elevation Viewing Toolbar along the top of the pane, the Elevation Design Tabs along the bottom of of the pane, and the Detail Addition/Editing area (the largest part of the Editing Pane is located in the middle of the bottom pane which changes as each Design Tab just below is selected). As changes are made via this pane, they are reflected in the elevation drawing pane when updated.

### **Data and Tools Menu Tree**

The navigation on the left-hand side of the screen is the Data Selection/Entry and Tools Menu Tree. This menu of data selection and entry windows is the starting point of every job. The first step in the new job progression is Vendor Selection found toward the top of the menu. As the user moves from the top of the list to the bottom the necessary functions are encountered in order, starting with the Vendor List, Job Lists, and Elevation Lists through to the individual parts lists for each vendor. This menu also includes the special utilities for creating and editing the drawing, printing the drawings, reports and lists, plus access to the licensing and registration utilities.

### **Elevation Statistics Summary Box**

In the lower left-hand corner is the Elevation Summary Box. As each elevation is selected the Elevation Summary Box displays a material and parts summary for the selected elevation. These elevation totals are then summarized in various reports throughout the program.

## Starting a New Project

Critical to understanding how WinBidPro works is the progression for creating a new project for estimating and bidding. WinBidPro is designed to follow this natural progress although it is flexible enough to allow ad hoc editing throughout the project. The basic progress is as follows:

1. Select a vendor.

Note: The vendor catalog for a particular vendor must be [downloaded and installed](#) before that vendor can be selected. If there is no vendor catalog for the vendor you're planning to use, then you will need to download and install the Custom Vendor Catalog which consists of an empty database in which you can add to the parts list as required.

2. Create a job for the new bid.
3. Select a Framing System
4. Create elevation(s) for the job to be bid.
5. Add components to the elevation.

The Elevation Design Tabs along the bottom of the Elevation Editing Pane are laid out in a logical building sequence from left to right for adding components to elevations. While it is not necessary to follow the tabs in order, it may be easier to add the components when the sequence is one from left to right.

6. Optimize the project.
7. Enter pricing and multipliers.
8. Print reports.

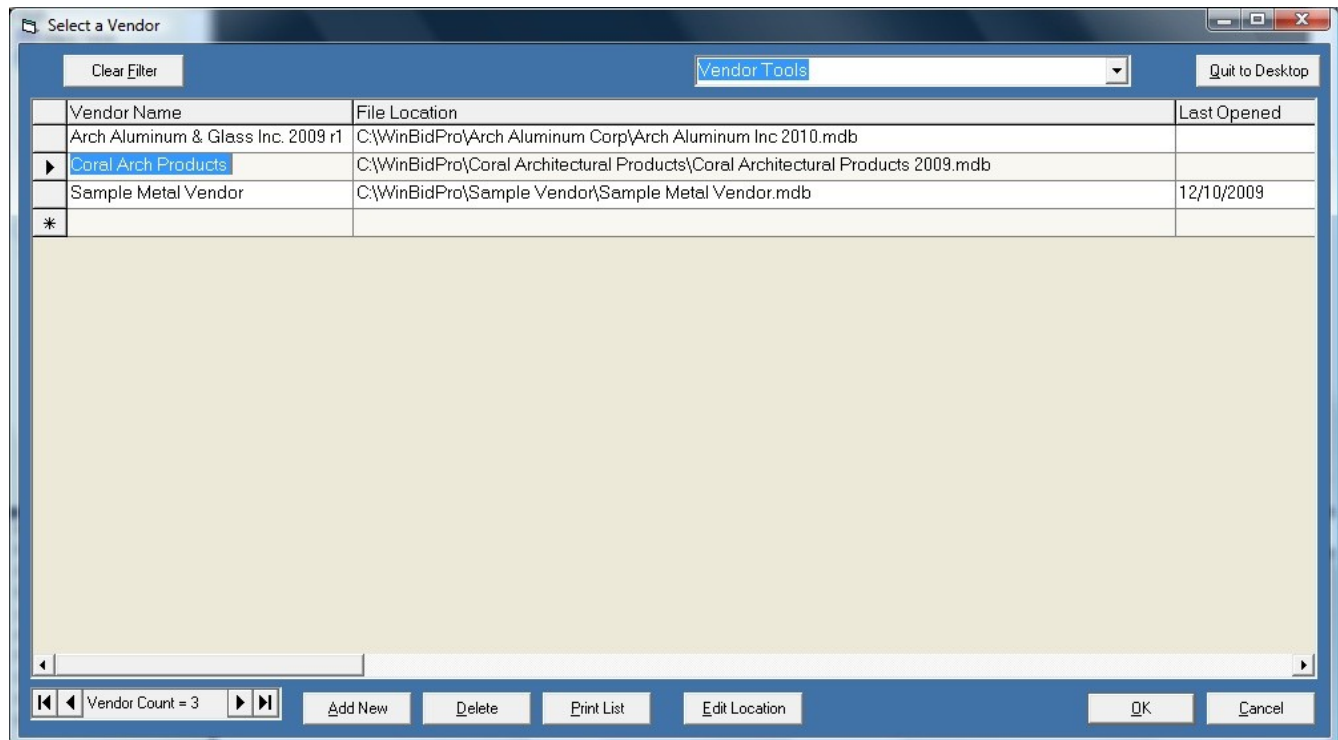
The purpose of the sample project below is to help you quickly understand how WinBidPro works and where the key features are located.

## A WinBidPro Sample Project

### 1. Select a vendor.

Note: The vendor catalog for a particular vendor must be [downloaded and installed](#) before that vendor can be selected. If there is no vendor catalog for the vendor you're planning to use, then you will need to download and install the Custom Vendor Catalog which consists of an empty data base to which you can add to the parts list as required.

Click the “Vendors” link in the left-hand Data and Tools Menu Tree. The “Select a Vendor” window will open. Highlight the appropriate vendor and click OK.



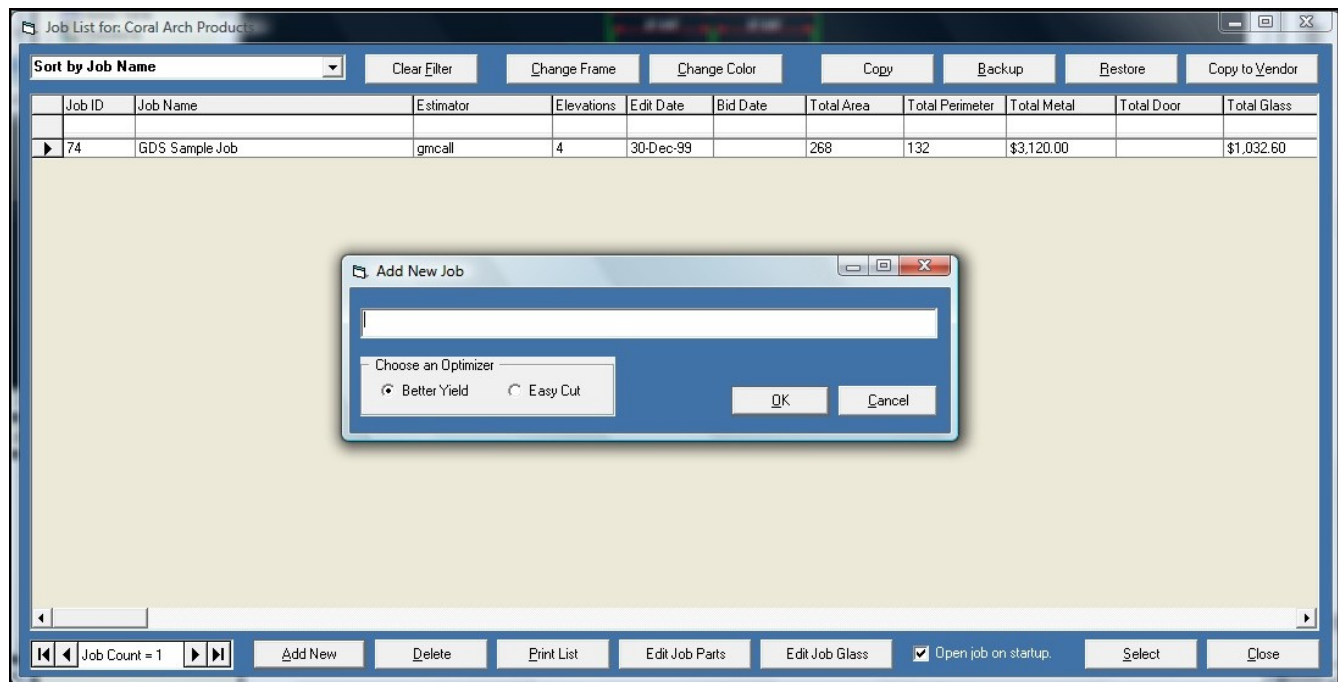
*Illustration 36: The Select a Vendor window is the starting point for each new bid. To open, click the Vendors link in the left-hand Menu Tree.*

Once the vendor/manufacturer is selected, all jobs and elevations created from that point will be associated with that vendor's catalog. If you want to work with another vendor, you will need to return to the “Select a Vendor” window and select the new vendor.

**Tip:** If you want to create a bid for another vendor, then you can copy a job to that other vendor by clicking “Copy to Vendor” in the Jobs List (Jobs link in Menu Tree), selecting the new vendor and one of its Framing Systems and any required door frames and door leafs. The elevations and components will be copied to the new vendor's Job List. Then select the new vendor from Vendors and the job from Jobs. The goal is to select a similar framing system and entrances when copying to another vendor, but adjustments may be needed in the elevations to account for manufacturer variation.

## 2. Create a job for the new bid.

In the Menu Tree, click the Jobs link and the “Job List” window will open. Click “Add New” and the “Add New Job” window will open allowing you to enter a job name to be associated with the selected vendor.



*Illustration 37: To create a new job for the selected vendor, click the Add New button in the Job List.*

Notice that you can select the optimizer type at this point. “Better Yield” will mix the cut sizes up more in a given stock length, but will give you less scrap than the “Easy Cut” method. (This can also be changed later in the Optimizer window.) Click **OK** and the “Elevation Info” window will open.

Note: As this is a new job, the “Elevation Info” window will automatically open since every job is required to have at least one elevation. However, if you already are working on a job with one or more elevations, you can create a new elevation by clicking the Elevations item in the Menu Tree just below the “Jobs” link and select “Add New” from the bottom of the window, or you can merely click the Elevation menu just below the current drawing and select “New Elevation.” (See screen shot below of options for adding elevations.)

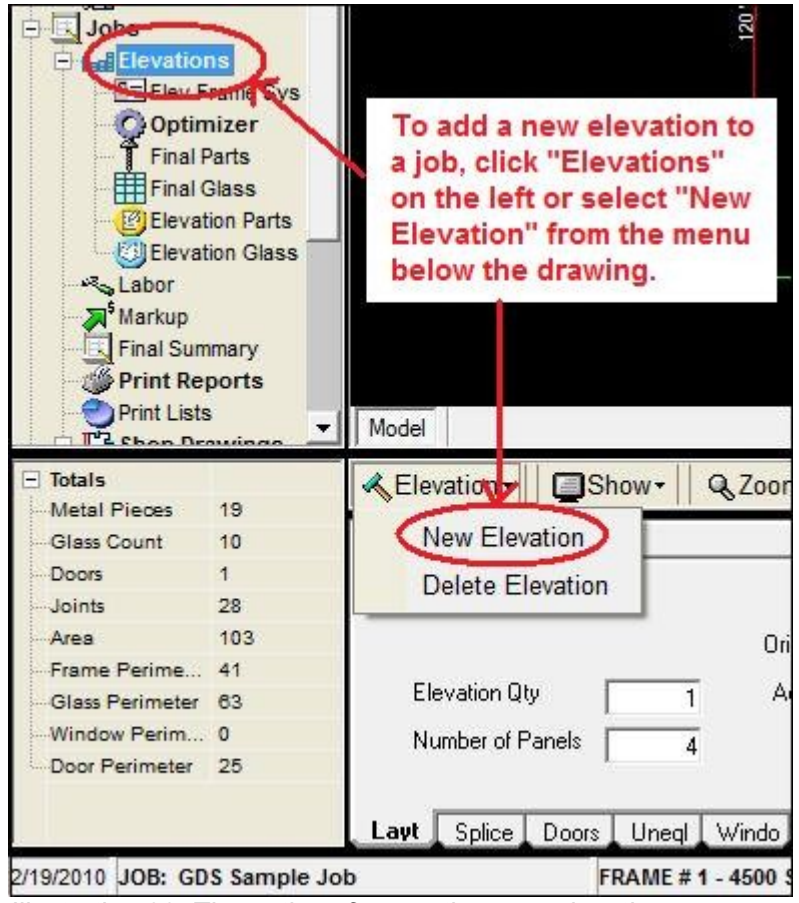


Illustration 38: The options for creating new elevations are as shown.



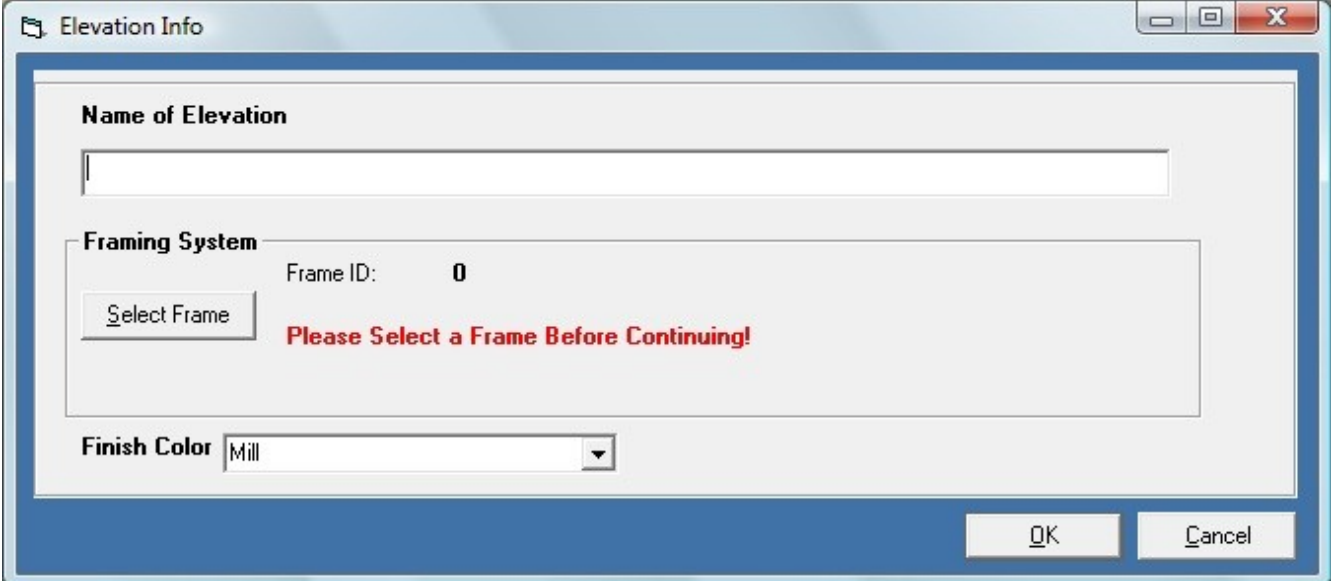
### 3. Create elevation(s) and select the framing system for the job to be bid.

The Elevation Info window is the first step in creating elevation(s) for the job. This window allows you to name the elevation, select the framing system, and finish color. (WinBidPro does not allow an elevation to be created without selecting a framing system. If you create additional elevations after the first, the Framing System will default to the current selected system.)

Enter a name for the elevation up to 250 characters. This name will appear in the “Elevations for Job” list. You can create an unlimited number of elevations per job in WinBidPro v15.

See the next section for details on **Select Frame**.

Select **Finish Color** at the bottom of the window.



*Illustration 39: The Elevation Info window opens whenever a new elevation is created or an elevation is edited. Each new elevation requires the selection of a framing system.*

The Elevation Info window is the same screen which opens whenever you opt to create a new elevation or edit the settings of an existing elevation via the "Edit Settings" button in the Elevations for Jobs window (opened by clicking the Elevations link in the Menu Tree).

### Selecting the Framing System

When **Select Frame** is clicked, the Framing Systems window for the selected vendor/manufacturer is displayed. The list will show all the framing systems in the vendor/manufacturer's catalog. Select the appropriate framing system for your bid. When a framing systems is selected from a vendor catalog, it includes all the parts and materials required for that frame system whether storefront, curtain wall or another type of framing system.

If you need to edit the parts or materials in a framing system, you can open the Framing Systems Parts window by clicking the Elev Frame Sys link in the Menu Tree.

Frame ID	Description	Frame Type	Profile	Glazing Method	Glz Thickness	Glass Position	Sill Rece
2	FL200 Flush Glz 1/4 Glass Inside Glz	Screw Spline	1.75	Inside	0.25	Center	
1	FL200 Flush Glz 1/4 Glass Outside Glz	Screw Spline	1.75	Outside	0.25	Center	
4	FL300 Flush Glz 1in Glass Inside Glz	Screw Spline	2	Inside	1	Center	
3	FL300 Flush Glz 1in Glass Outside Glz	Screw Spline	2	Outside	1	Center	
9	FL300T Flush Glz 1in Glass Out Glz Thermal	Screw Spline	2	Outside	1	Center	
8	FL500 Flush Glz Hurricane Impact 9/16in Glass	Impact System	2.5	Outside	0.5625	Center	
13	FL550 Flush Glz Hurricane Impact 1-5/16in Glass	Impact System	2.5	Outside	1.313	Center	
7	FS300 Front Set 1in Glass Ribbon Wall	Screw Spline	2	Inside	1	Offset	
12	FS400T Front Set 1in Glass Ribbon Wall Exterior Glaze	Screw Spline	2	Outside	1	Offset	
11	FS400T Front Set 1in Glass Ribbon Wall Interior Glaze	Screw Spline	2	Inside	1	Offset	
10	Pw250 Curtain Wall - Captured 1/4 in Glazing	Curtain/Pressure Wall	2.5	Outside	0.25	Offset	
6	Pw251 Curtain Wall - Butt Glz1in Glazing	Curtain/Pressure Wall	2.5	Outside	1	Offset	
5	Pw251 Curtain Wall - Captured 1 in. Glazing	Curtain/Pressure Wall	2.5	Outside	1	Offset	
1068	Pw256 Curtain Wall - Butt Glazed 9/16 in. Glazing	Impact System	2.5	Outside	0.5625	Offset	
1071	Pw256 Curtain Wall - Captured 9/16 in. Glazing	Impact System	2.5	Outside	0.5625	Offset	
1070	Pw256 Curtain Wall - Captured Dry Glaze 9/16 in. Glazing	Impact System	2.5	Outside	0.5625	Offset	

Illustration 40: The Framing Systems window shows the framing systems available from the selected vendor. The framing system includes all the required components for the type of system.

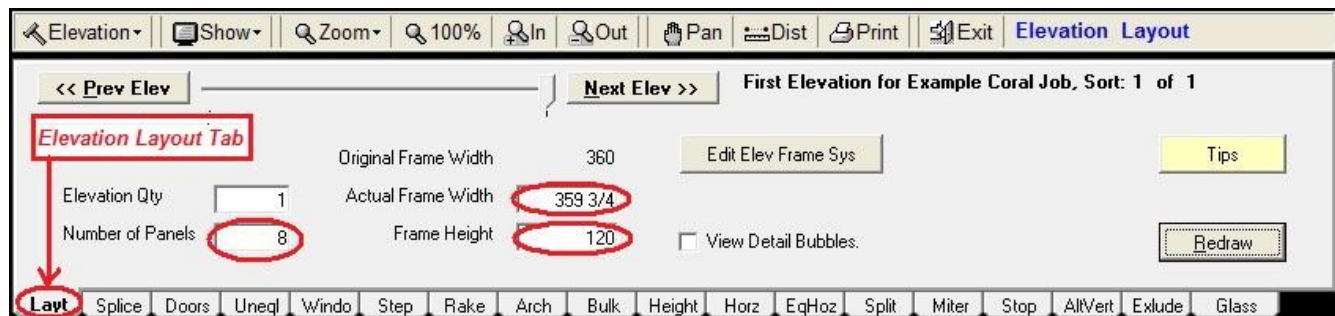
#### 4. Add Panels and Dimensions to Elevations in the Basic Layout Tab

Initially, the Elevation Drawing Window will be blank or show default information. By default the **Layt** (Basic Elevation Layout) tab will be selected in the Elevation Design Tabs at the bottom of the screen. The Elevation Design Tabs are laid out in optimum order for building an elevation.

To create a drawing for the elevation, you must first input the number of panels that will appear in the storefront plus the maximum frame width and height. The dimensions of each panel will be automatically calculated by WinBidPro as equal widths. Note: Panels may be referred to as Bays or Columns in certain parts of the country.

In this case, six panels were added with a total elevation width of 360 inches (30 feet) and a height of 120 inches (10 feet). (Dimensions may either be entered as feet, 30', or inches, 360, plus fractions or decimal equivalents, the program will automatically convert the dimensions.)

**Tip:** At this point, do not attempt to specify the exact width for individual panels as these will be automatically calculated as equal width. This will facilitate the addition of doors and entrances when WinBidPro v15 will automatically recalculate the panels widths allowing for the dimensions of the doors and entrances. After adding your entrances (**Doors** tab), you may designate unequal panel widths as necessary in the **Uneql** tab.



*Illustration 41: The Elevation Layout Tab (Layt) specifies the number of panels plus frame width and height in the elevation.*

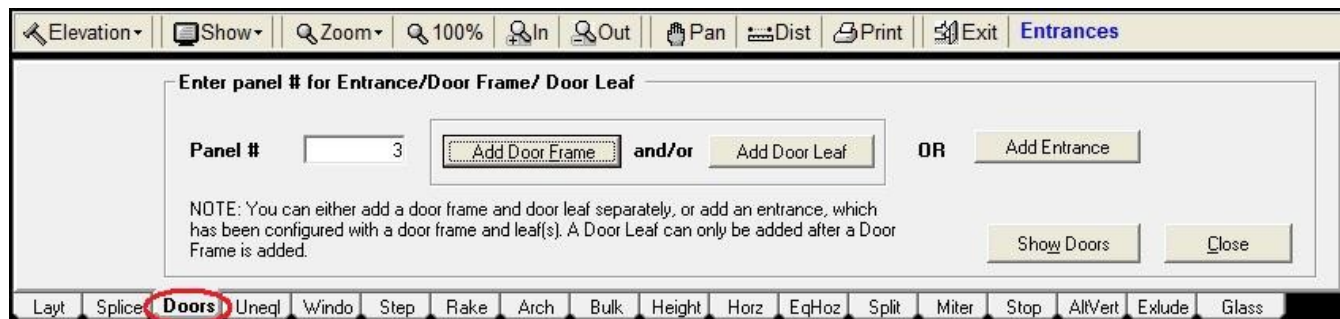
**Tip:** The difference between the Original Frame Width value you entered and the Actual Frame Width. The Actual Frame Width has been rounded down. This feature is user selectable and allows all panels to be equal when the calculated width of each panel may not be equal based on the actual dimension entered. You can set the Rounding Feature in Drawing Settings (click the Drawing Setting link in the Menu Tree under Drawing/Details) to "Round last panel", in which case only the last panel of the elevation is rounded down to the nearest 1/16 of an inch.

## 5. Add Doors and Entrances to the Elevation.

The Elevation Design Tabs along the bottom of the pane are laid out in a logical building sequence from left to right along the bottom of the Elevation Editing Pane for adding details to elevations. While it is not necessary to follow the tabs in order, it may be easier to add the components when the sequence is followed. For the purpose of this example, The **Doors** tab will be examined next.

Adding doors in the v15 WinBidPro program is entirely different from v14. Door frames and leaves have been separated out of the Framing Systems section of the program. You now have full control over a list of individual door frames and door leaves, plus there are pre-configured entrances (door frames and leaves together). You can edit, add to, and delete items from these lists any time, both at a vendor level, and an elevation level. You can also configure an Entrance which includes the door frame and leaf you select. This is especially helpful if you consistently use the same entrance, since you will be able to add this to any elevation in one step.

After selecting the **Door** tab, which initially will display a summary of the entrances, in the elevation (it will display an empty list until you add an entrance), click the **Add Entrance** to the left of the blank list. The display will change to the selection window shown below.



*Illustration 42: The Doors tab is used to add door frames, door leaves, or entrance packages (frame and leaf) to the elevation.*

First enter the panel number (1, 2, 3, etc.) where you would like to add the entrance. (The panel numbers appear in the displayed elevation drawing just below each panel.) Then either select a door frame by clicking the Add Door Frame button, or directly access the pre-configured entrances (frame plus leaf) by clicking Add Entrance.

If you decide to use add door frames and leaves separately, you must add a door frame before you can add the leaf. You may add a door frame without adding a leaf. When you click Add Door Frame a list of frames from the vendor catalog will open for you to select the proper door frame. When you click Add Door Leaf a list of leaves from the vendor catalog will open for you to select the proper door leaf. (You will not be able to open the Door Leaf Selection windows until a door frame has been selected.

Alternatively, you may select an entrance from the vendor catalog (includes preset door frames and door leaves) by clicking Add Entrance. Rather than displaying only a selectable list of the door frames and door leaves from the vendor catalog, as shown in the other two selection windows, the Entrance Configurations window displays both the package selection numbers and the details of the included frames and leaves as shown below. As each entrance is highlighted by clicking it with your mouse, the details for the panes for the included door frame and door leaves change to give you a complete description of each entrance package.

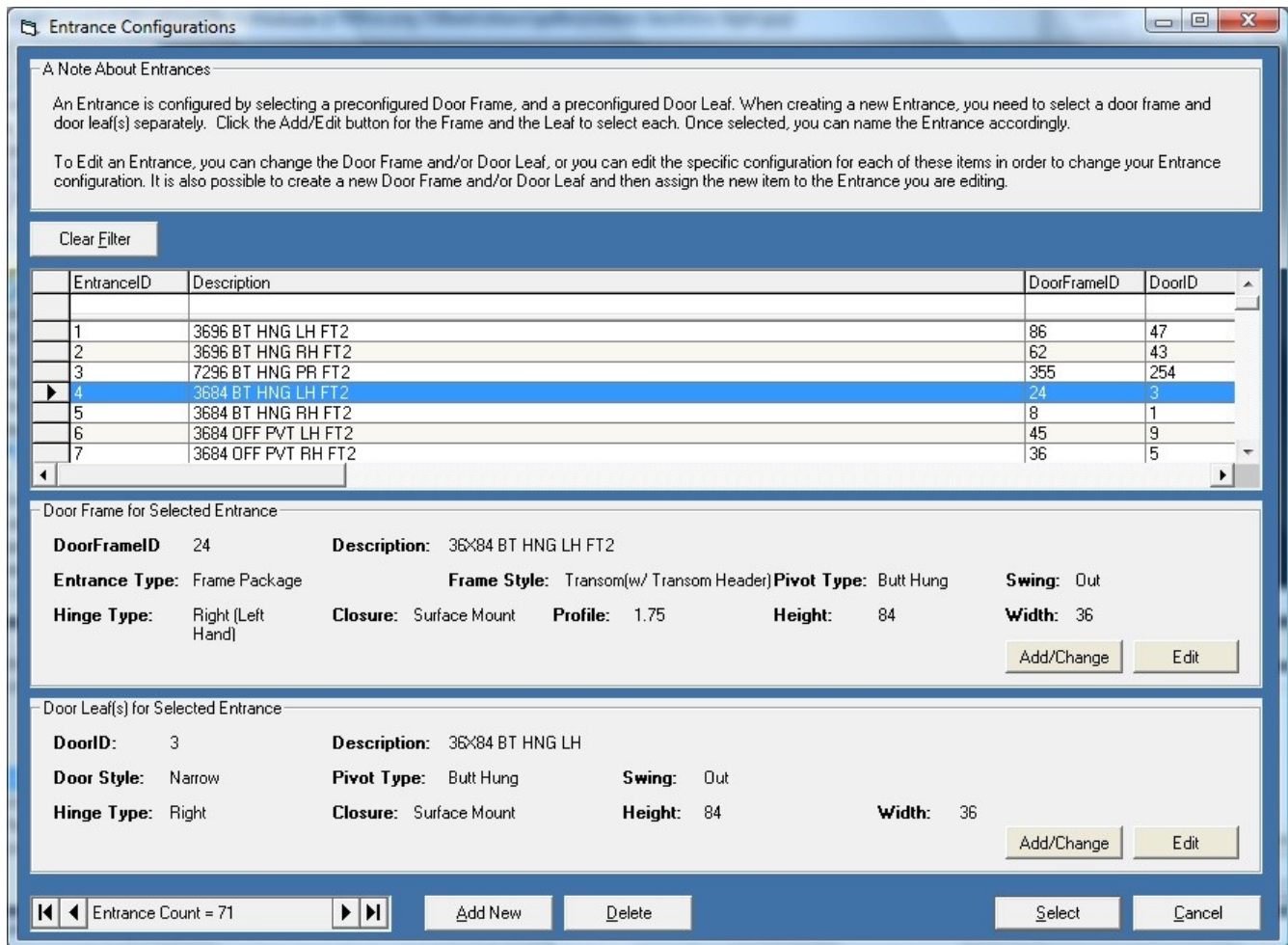


Illustration 43: The Entrance Configuration window allows you to select prepacked entrances (door frames and leaves), as well as, change the entrance packages.

If you click the Select button at the bottom of the Entrance Configuration window, the entire entrance package will be inserted into the elevation. After adding the entrance (or individual door frames and/or door leaves), clicking the Show Doors button will redraw the elevation window and revert the Doors tab to the list of doors. The parts for the frames and leaves for any of the selected doors, or entire entrances can be edited or deleted in the Doors tab.



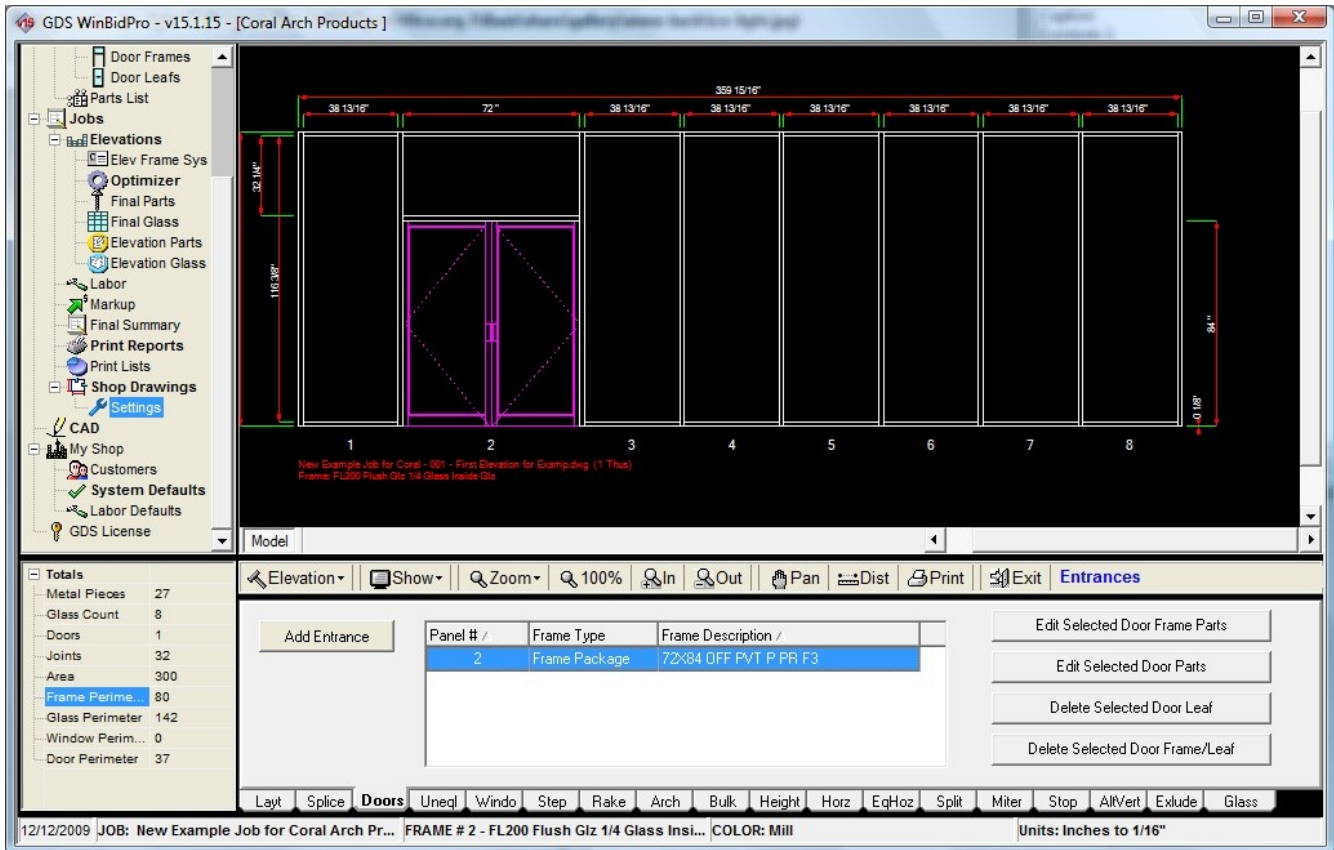


Illustration 44: The Elevation Drawing Window shows the drawing after an entrance package has been added. The elevation is redrawn with door, leaf, and entrance additions when the Show Doors button is clicked.

## 6. Adding Components to Elevations

Each of the Elevation Design Tabs along the bottom of the main WinBidPro v15 screen controls a different aspect of the elevation. These are the primary tools that you will use when working with the elevations. Although these tabs are not covered in detail in this Quick Start Guide, it is recommended that you play with each of these design tabs to get a better understanding of what they do and how to use them. As feature components are added to the elevation the remaining panels are recalculated to be of equal width. The following are the highlights of the Elevation Design Tabs:

### ***Splice (Splice)--New to v15***

The **Splice** tab is for setting vertical splice joint locations in a tall elevation. Tall elevations are generally higher than 24 feet, which is the standard length of an extruded vertical component in the fenestration industry. These splice locations relate to hardware that can be configured in the framing system that is selected to draw an elevation. The **Splice** is the only tab appearing before the **Doors** tab.

### ***Unequal Panels (Uneql)***

Easily change the width of one or more panels with the **Uneql** tab. This tab falls after the Doors tab since adding a door to an elevation will automatically equalize the remaining panels. So if you need door side lites to be a different width than the rest of the panels in the elevation, you can use this tab to change the width of the side lites.

### ***Window (Windo)***

The **Window** tab in v15 is similar to the Transom tab in the v14 program. Since transoms are typically referenced as a lite of glass above a door, we decided to rename this feature to something different. Either way, this feature allows you to remove verticals between horizontals to turn multiple lites of glass into one piece. The v14 version of WinBidPro allowed you to remove one or two verticals, but no more. WinBidPro v15 allows you to define the range of glass to work with.

### ***Step (Step)***

The **Step** feature was called "Cascade" and it was found in the "Setup Basic Framing Structure" window in v14. The advantage to this new tab in v15 is that you can apply the step to specific panels, which means, you can have a variety of configurations. The **Hght** tab could accomplish the same thing, but you would need to apply a new height to each panel you want to change. The **Step** tab, with a specified range, will divide up the rise of the steps equally.

### ***Rake Top (Rake)***

The Rake Top feature was located on the same layout page as the Cascade feature in v14. Now it has its own tab. The old program let you rake in one direction only. Version 15 will let you enter rakes going both directions to form a peak. You can even stagger the rakes to form a variety of shapes. The one limitation of this feature is that the peak must form at a vertical, so if you are drawing an elevation with one piece of glass with a gable top, you will need to exclude the vertical and adjust your glass sizes and your horizontal/sill material. However, with the VCAD tool, you can make the drawing look the way you want.

### ***Arch Top (Arch)--New to v15***

Brand new to the v15 program is the ability to draw an elevation with an arch top. This feature is fairly



limited in it's current state, but we plan to enhance it in the first major update to v15. To enter an arch top, you have two options. You can enter a radius for the actual arch, or you can enter the rise of the arch, from the flat top of the elevation, to the top of the arch. Add an Arch Tab Once you have entered the panels which span the arch, and one of the height values, you can click Add to Drawing to update your elevation drawing.

Note: Extending verticals up into the arch is not yet possible, although this capability is planned for a future version of WinBidPro.

### ***Bulkhead (Bulk)***

The **Bulkhead** tab can have more than one use in the WinBidPro System. You can use it to draw a typical bulkhead or knee wall, and you can use it to add a caulk joint to the bottom of an elevation that has an entrance. This gives you the correct cut sizes for door jambs if you are quoting a stock length door frame, and it also shows the correct frame size relative to the door. The alternative to this is to use the >.375 value in the door frame parts screen for the door jambs. In this case you wouldn't need to use the bulkhead for a caulk joint. The difference with using the latter is the drawing won't show the extended jambs.

### ***Height (Height)***

The **Height** tab lets you change the height of a given panel or panels. You can use this as an alternative to the **Step** feature if the variance between panel heights is not the same.

### ***Horizontals (Horz)***

The **Horz** tab has some new options available for adding horizontals in WinBidPro v15. Typically, you would add a horizontal from the ground (or the 0" point) to the bottom of the horizontal. This is the default option when you click on the **Horz** tab. You can also choose to "Add a horizontal above the highest (previous) horizontal." If you choose this option, enter the distance from the bottom of the highest horizontal (which is the previous one you entered--if working from the bottom up) to the bottom of the horizontal you want to add. This comes in handy when working on tall elevations with plans showing spacing between horizontals.

Also, there is Select Type of Horizontal option in this view. v15 has four possible horizontals to choose from, where the v14 program only had two. You can simply click the type of horizontal you want to add before clicking the Add to Drawing button. The four types of horizontals correspond to the four horizontal profiles and part number fields in the "Framing System Parts" window. You can set a different profile and part numbers for each type of horizontal. This feature will come in handy for curtain wall/pressure wall systems with spandrel glass, etc.

Lastly, you can click on the Selected Panels option to open the Add Horizontals window and quickly choose into which panels the added horizontals will go. Simply check the box for each panel in which you would like the horizontals to appear. Any tab in the drawing window that has a Selected Panels option will display this same window.

Tip: Remember that adding a horizontal to All Panels will automatically exclude panels with doors, so if you need horizontals in every panel except doors, use the All Panels option. Notice the options at the bottom of Add Horizontals window. You can quickly check and uncheck boxes in a variety of ways when selecting one of these options.

### ***Equal Horizontals (EqHoz)***

It was possible to add equal horizontals in v14, but it wasn't very obvious if previously you had never done it. Now, there is a **EqHoz** tab just for this feature. The benefit of this is to give you equal daylight

between horizontal material so that your glass heights will all be the same. Years ago, you would have had to figure out the height of each row of horizontals and enter them separately.

As with the **Horz** tab, you can also pick one of the four types of horizontals when adding equal horizontals. The catch here is that all of the horizontals will be added with the one type that you select. If you require different horizontals on alternating rows, you can always change the type in the list in the **EqHoz** tab.

**Note:** Make sure you have configured a profile and part numbers for the type of horizontal that you add to your elevations. You can always do this after the fact by clicking on the Elev Frame Sys link in the menu tree on the left-hand side of the screen.

### ***Splits (Split)***

The new v15 program has improved the split feature that was available in v14. You can now specify the number of splits to add, as well as defining the range of panels to which to apply them. So where the v14 program would only allow for one split, you can tell WinBidPro to split a panel four times. Another improvement with this feature is the ability to split from the sill to the first horizontal. This gives you more flexibility in creating a variety of drawings.

**Tip:** When adding Splits to an area defined by a Window, you will need to specify "From" the first panel in the Window "To" the first panel in the Window. Think of it as a Window being only one panel, and you are splitting it equally.

### ***Miters (Miter)***

The **Miter** tab will let you add miter joints to the corners of your elevation. When adding a miter joint to your elevation you will either enter the Left Jamb or the Right Jamb number, and check the Top and/or Bottom box.

### ***Stops (Stop)--New to v15***

The ability to add glass stops to your elevation with the **Stop** tab is a new feature for v15. The door frame parts window lets you easily add a transom stop to a door head, but you will want to use this tab if a transom, or any other lite of glass requires glass stops on any or all sides.

### ***Alternate Vertical (AltVert)***

Changing a vertical in an elevation from a standard vertical or jamb is easy with the **AltVert** tab. This is common if there is a corner at one end of the elevation, or if there is a support beam in the middle of a run of panels. When you add an alternate vertical, you specify the vertical number and the new profile of the member.

After entering the vertical number and the width, click the Add to Drawing button and you will see the Alternate Part Number Input Window. Enter the parts required for the alternate vertical you are adding and the standard vertical part numbers for this member will be substituted with these new numbers.

**Tip:** As in the other windows, you enter frame and door part numbers, you can right-click your mouse in the framed area to open the parts list in order to select the required parts.

### ***Exclude (Exlude)***

The **Exlude** tab is a familiar one if you have used the v14 software. Although in the older software, you were only able to exclude a wall jamb or sill. In WinBidPro v15, you are able to click on any framing member you plan to exclude. The one catch about excluding a frame member is that it still remains as part of the elevation drawing. When a frame member is excluded, it is shown as a dashed line, instead

of a solid line. The real purpose of an excluded frame member is to remove it from the parts report and optimizer. This is why you will want to use this feature when two separate elevations meet (i.e. at a corner) with redundant parts. One will be changed to include the new parts, the other will show the exclusion of the old parts

The **Glass** tab is addressed in the next section.

## 7. Glass

One of the significant changes in how glass is added to your elevations in v15 is that there is no need to leave the drawing part of the program to do it. It is very simple to go back to the Layout tab (Layt) and change the size of the elevation, add/remove horizontals, or change any other detail. Since the Elevation Drawing Window in v15 is essentially a CAD environment, it was necessary for us to show a glass layer and remove the aluminum part layers from the drawing to make it easy to select the lites of glass with which you want to work.

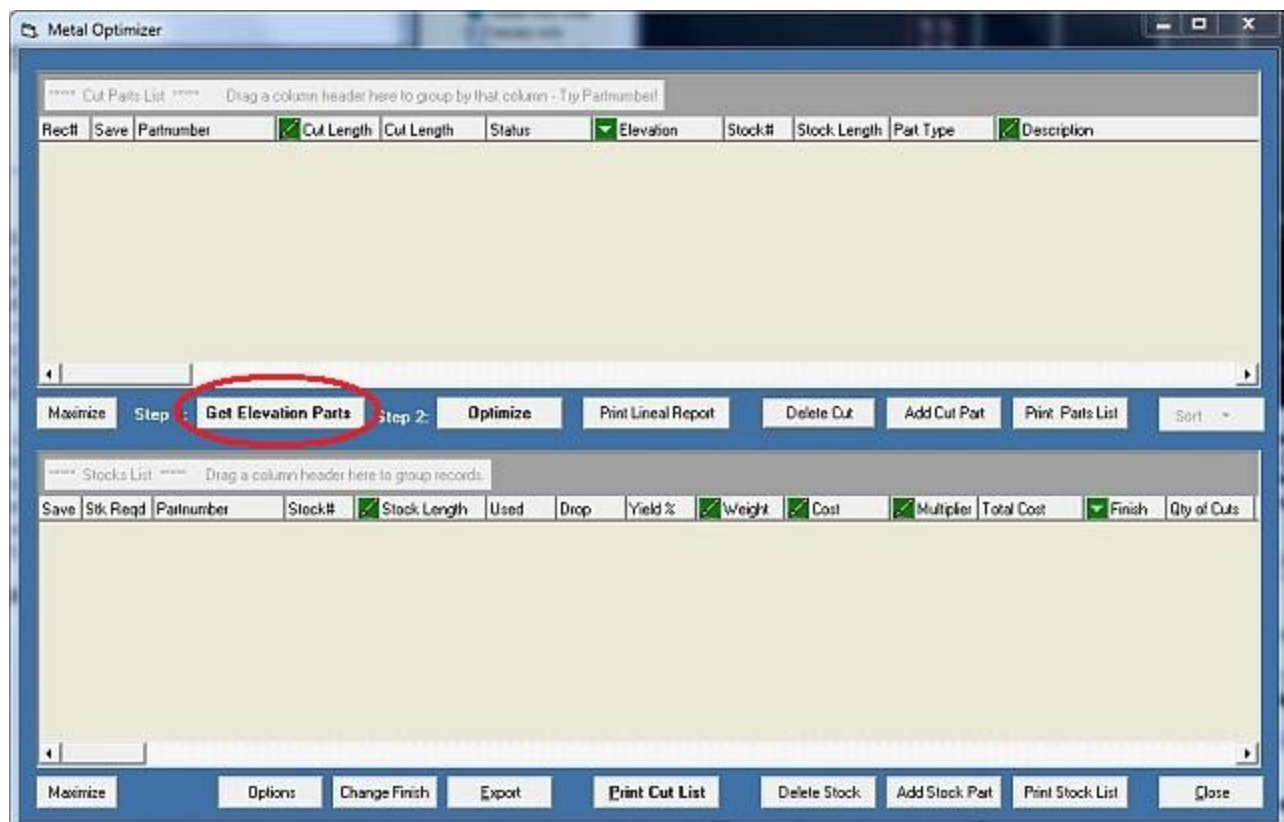
There are some other significant improvements in adding glass to your elevation between the v14 program and WinBidPro v15. One improvement is the ability to Delete glass from an elevation. Version 14 had no way of doing this. Another improvement is the ability to Add or Delete glass from an entire elevation.

Working with the glass is facilitated by three different features: the "Action", how to "Apply Glass", and the glass list itself. The first thing you will want to do is select the "Action" to perform. Add is the default option when you click on the Glass tab. Before you "Apply Glass" you will want to decide if you want to do it by Row, by Lite, or by Elev. Remember that you can choose any combination of these six options. After you have chosen the options you want, you can then click on the type of glass you want to add. Once you select the glass from the list, you simply use your mouse to click on the glass hash line in the drawing window to apply the glass. You will then see the first letter of the "glass type" that you have selected appear on the drawing.

## 8. Optimization

One of the major goals of WinBidPro is to produce material and parts lists both for bidding and ordering. However, before you run your parts reports you will first need to click the Optimizer link in the Menu Tree on the left side of the screen. This process is quite different from that in the v14 program. In the older software there was a Process button which you would click after entering all of your elevations. WinBidPro v15 is different in that you enter all of your elevations without ever leaving the drawing window, so you aren't presented with a Process button each time you finish adding an elevation.

After you click the **Optimizer** link, you will see a window similar to the screen below. The difference is, the first time you open this window for a new job, the top and bottom lists will be empty.

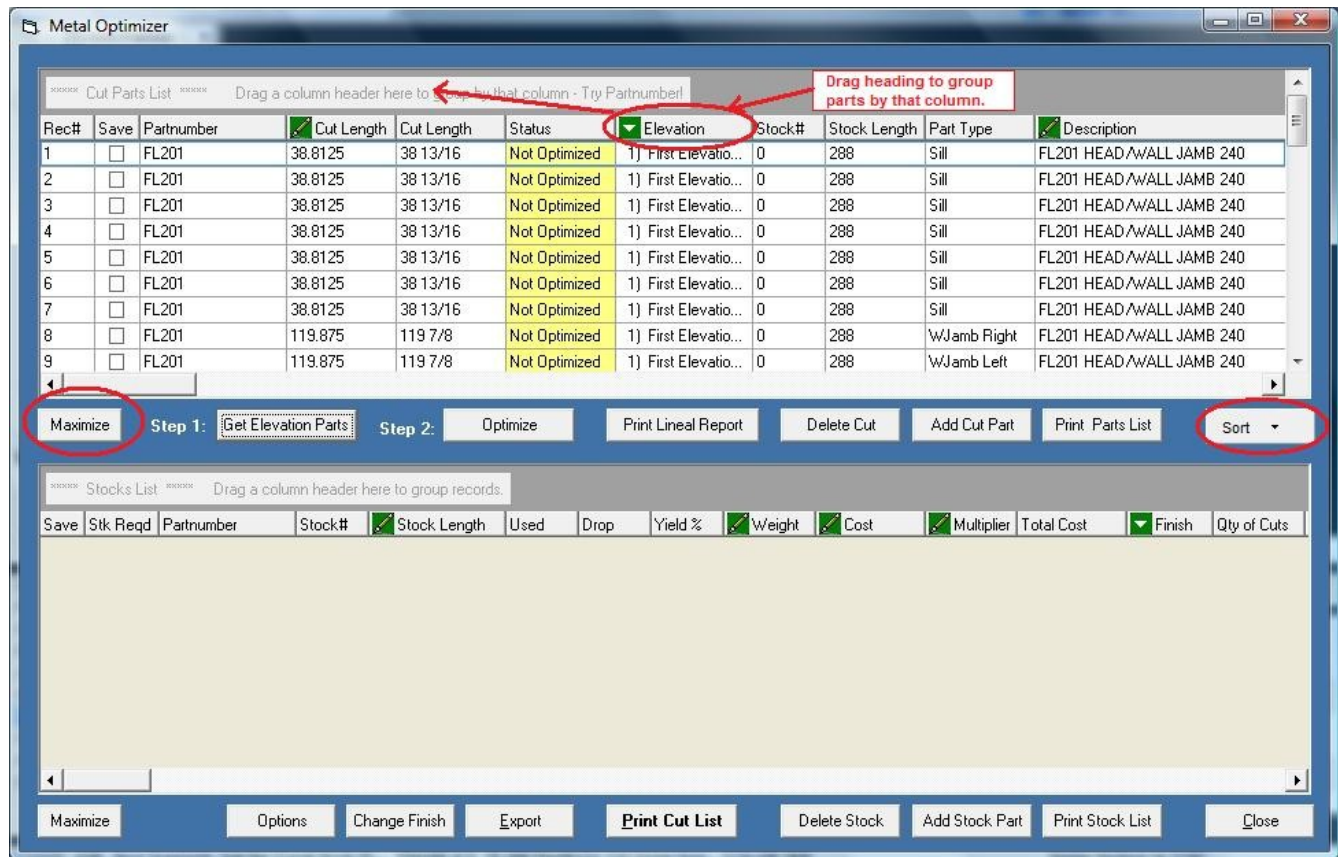


*Illustration 45: The first time the Optimizer button in the Menu Tree is clicked, the lists will be empty as shown. Click Get Elevation Parts to load the top window.*

### Step 1: Get Elevation Parts

Before all of your cut pieces and stock lengths will appear, you will first need to click the Get Elevation Parts button to load the top of the window. This action gathers the cut pieces from all of the elevations in the job as shown in the figure below. (At this point, stock length parts have not been optimized.)

Before you click the Optimize button (which actually optimizes the number of stock lengths and cut patterns), there are quite a few things you can do with the cut pieces.



*Illustration 46: The Metal Optimizer lists can be grouped by dragging a heading marked with the green icon to the field at the top left.*

Notice the green icons next to certain column headings (Cut Length, Elevation, Description, etc) at the top of each window. These icons indicate that these field are editable either by typing directly in the field or by selecting a new value from a list.

There are a variety of ways to view the cut parts in this window. You can click and drag any column heading to the area above the list to group the parts in the list by that field. For example, if you want to group the cut parts by elevation and enlarge the list to fill the window, you can drag the Elevation column heading to the drop area above the list (click and hold the left-mouse button on the heading, move the mouse over empty field in the top left-hand corner, then release the mouse button), and click the Maximize button below the list (circled in figure at bottom-left of list).

When you drag the heading to the blank field, the parts are sorted by part number by default. If you would like to change the sort order you have a couple of choices. You can click the **Sort** button (circled in figure at bottom-right of list) and select one of the options from the list before maximizing the top list. Another option is to click on one of the column headings in the list. The first time you click a column heading, the list sorts in ascending order. The second time you click the same heading the list is

sorted in descending order.

### ***Editing and Adding Cut Pieces***

This new metal optimizer also gives you the ability to edit or add cut parts before they are optimized. If you would like to change the length of a cut piece, you can type a new length in the "Cut Length" column with the green icon at the top. This column stores the decimal measurement of the cut pieces, while the column to its left stores the fraction equivalent. (Hint: If you do change the length of a part, you will probably want to save this change by clicking the "Save" check box in the second column from the left, so that it is not overwritten the next time you click the Get Elevation Parts button.)

If you need additional parts to be figured into the optimization of a job, you can click the Add Cut Part button and manually add a part to the list. This gives you flexibility that was never available in the v14 program. You now have control over the cut pieces of a job before they get optimized.

### ***Tip to Optimize only manually entered parts.***

If you need to manually enter cut pieces without parts coming from a drawing, you can do this by fooling the system. The first thing you need to do is create a job and a "fake" elevation. You can even go so far as to keep a framing system in your list that has no part numbers in it, only the frame profiles.

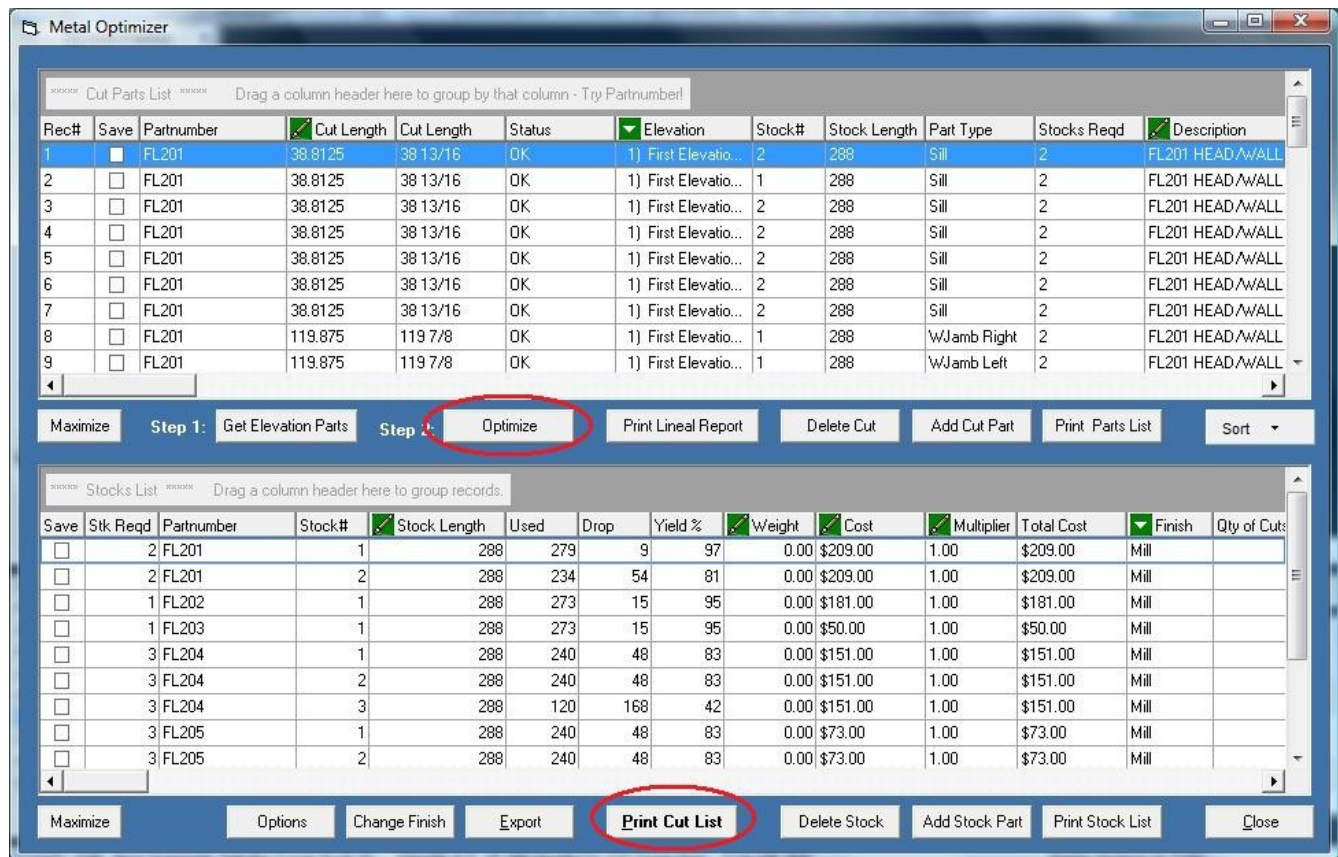
Create a simple one panel elevation to use the drawing on the screen. Then, click the Optimizer link and immediately start adding cut pieces. You can do this with a regular framing system as well, but you have to remember not to click the Get Elevation Parts button. (If you are using a framing system with no parts, there is no problem, but if you selected a system with parts, all of those parts will be added to your list of cut pieces.) Once you have entered all of the pieces you plan to optimize, click the Optimize button in the middle of the window. The bottom list of stock lengths will then be populated.

### ***Step 2: Optimize***

Whether you have gathered cut pieces from elevations in the job, or manually entered cut pieces, you will need to click the Optimize button in order to calculate the stock length counts and cut patterns for all of the parts. Notice in the figure below that "Stock #" and "Stocks Req'd" columns are also populated after optimizing. These values will show up on the printed report when you click the Print Parts List button in the middle of the window. The printed parts lists is a copy of all the cut pieces for your job, including any pieces you have added or changed.

**Important Note:** Any time you make changes to your elevations in a job, you must open the Optimizer window and complete Step 1 and Step 2 again. These lists of parts are only updated when you click the "Get Elevation Parts" and "Optimize" buttons.





*Illustration 47: The final step of optimization is clicking the Optimize button which will calculate and load the bottom window. Remember, any time changes are made to the elevations, Step 1 Get Elevation Parts and Step 2 Optimize must be repeated.*

### **Changing the Optimization Method and Finish Color**

In WinBidPro v15, there are two alternatives for optimizing the cut list in your jobs—Best Yield and Easier to Cut. You made this selection when you first created the job. However, you can now change the optimization method by clicking the Options button at the bottom of the window.

The default choice when you first use the program is “Best Yield” which calculates cut lengths which will produce the least scrap and best possible yield. The disadvantage to the “Best Yield” method is that part length cuts will appear in a more random order in a given stock length in order to achieve this efficiency goal. This will require moving the chop saw stop more often, although it will waste less material—especially on larger jobs.

“Easier to Cut” method groups parts together more in a longest to shortest order. This optimization method is generally easier for the person running the chop saw since the stop doesn’t have to be moved as often. If you change the optimization method you will need to rerun Step 2: Optimize.

## 9. Enter Pricing and Multipliers

### Understanding the Three Parts Lists

To make the best use of WinBidPro v15 it's important to understand how the parts lists are handled. For every job there are three separate data sets used to track the parts and part information in the job: the Vendor Parts List, the Job Parts List, and the Final Parts List.

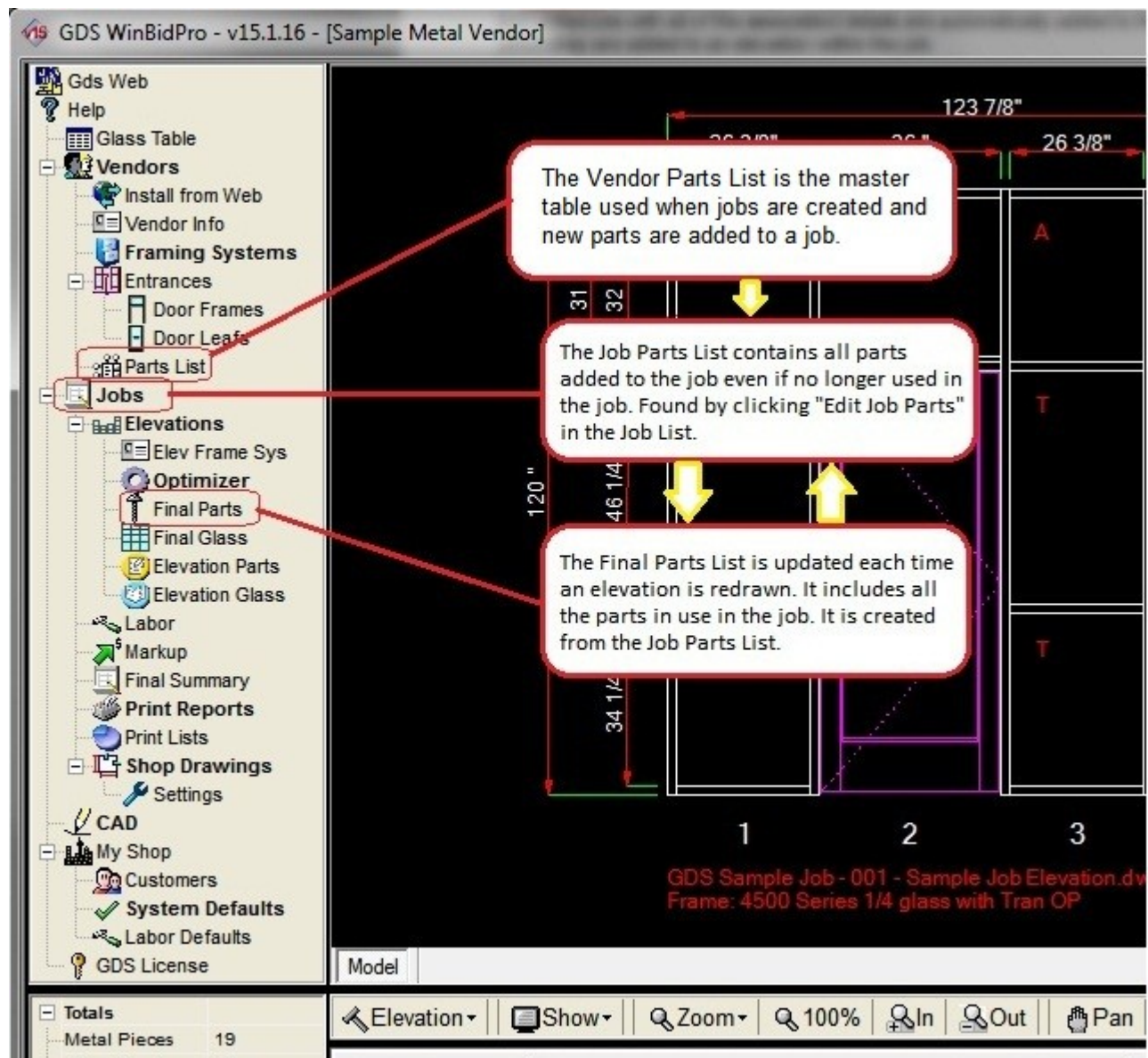


Illustration 48: Understanding how the three parts list work together is important to making WinBidPro work better for you.

### ***Three Parts List Work Together***

The **Vendor Parts List** is the master parts list. When ever a job is created or a new framing system, entrance, or part is added to a job, the components are taken from this master parts list and inserted into the Job Parts List. (See figure above.)

The **Job Parts List** is the master parts list for a particular job. It is created when a framing system is selected and contains all the components that are automatically taken from the Vendor Parts List during the course of working on a job. The components for the **Final Parts List** are taken from the Job Parts List each time an elevation is redrawn. Changes made to the Job Parts List do not affect the Vendor Parts List, unless a new part not found in the Vendor Parts List is added manually. Once a part has been inserted in the Job Parts List from the Vendor Parts List, changes in the Vendor Parts List will not affect those parts.

### ***Vendor Parts List***

The Vendor Catalog contains the master parts table (Vendor Parts List) for each vendor which is the starting point for each job. You can either download the v15 catalogs for individual vendors from the GDS Web site, convert them from older v14 catalogs or create your own. The WinBidPro v15 Vendor Parts Lists include master sets of framing systems and entrances which include all of the specific parts for any selected set. These framing systems and entrances with all of the associated components are automatically added to the separate Job Parts List when they are added to an elevation within the job.

**Note:** Since parts are pulled from the Vendor Parts List and entered into the Jobs Parts List as features are added to elevations, changes to the Vendor Parts List will not flow through to jobs after they have already been included in the job. This feature is to protect your current jobs from unwanted changes after the job is started. However, if you need to make changes for the current job, you will need to make it in the Job Parts List.

Any changes you make in the Vendor Parts List will be available for new jobs.

**Tip:** If you are planning to start a job with a new vendor, add your multipliers and make any important changes or additions to the new Vendor Parts List prior to starting the new job. That way the current information will be loaded into the Job Parts List when you create a new job for the vendor.

The Vendor Parts List is accessed via the Parts List link listed under “Vendors” in the left-hand Menu Tree.

### ***Job Parts List***

The Job Parts List is an intermediary database created at the time a job is started. Each job has its own dedicated Job Parts List table. This allows WinBidPro v15 users to work with a streamlined parts list for the job without continually dealing directly with the much larger Vendor Parts List. The Job Parts List table is initially loaded with the components needed for the original selected framing system from the Vendor Parts List. Once components have been added to the Job Parts List they are not deleted—even if later they are no longer used in the job (i.e. the framing system or an entrance package is changed in the job).

Whenever an elevation is redrawn, the parts for the Final Parts List are reloaded from the Job Parts List. Any changes made to the Job Parts List will be included the Final Parts List at that time. However, any changes made in the Final Parts List are automatically included in the Jobs Parts List immediately. **Note:** Changes in either the Job Parts List or the Final Parts List will not affect the Vendor Parts List.

To edit the Job Parts List for the current job click the Jobs link in the left-hand Menu Tree to open the Job List window, then click the Edit Job Parts button at the bottom of the Job List window. The Job Parts List windows will open for the selected job.

**Tip:** To view the Job Parts List for another job appearing in the Job List window you must first highlight the job you want to use, click the “Select” button which will close the Job List window, then reopen the Job List window and click “Edit Job Parts” at the bottom of the window.

If you are making changes in the Job Parts List which should be permanently added to the Vendor Parts List, then, since they will not automatically carry over, you must make the same changes in the Vendor Parts List.

### ***Final Parts List***

The Final Parts List is a database of all the parts that will be required for the bid and the job. This database is created (or recreated) from the elevations each time an elevation is redrawn and each time the cut pieces are Optimized in the Optimizer window. When an elevation is redrawn, the program looks at the associated framing system plus any included doors or entrances, then adding any new parts to the Job Parts List. If any of the new parts are stock length parts, the job will need to be re-optimized in order for these parts to show up in the Final Parts List. In this situation, both Step 1 and Step 2 must be completed in the Optimizer window.

When you make a change in the Final Parts List, that change will also be made in the Jobs Parts List—not in the Vendor Parts List. Only pricing and part descriptions can be edited and saved in the Final Parts List. In this case, these changes are carried over to the Job Parts List. If a quantity of a part is changed, this will not be saved, because the program calculates these quantities when running the Optimizer and during the redrawing of the elevations. Any manually added parts will be saved and will not be changed when you re-optimize or redraw an elevation.

Tip: If you manually add a part to the Final Parts List and the part number is not found in the Vendor Parts List, you will be given the option of adding the part to the Vendor Parts List at that time. All manually added parts must appear in the Vendor Parts List.

Anytime that you make changes to the elevations, you will need to redraw the elevation to generate an up-to-date and accurate Final Parts List. The program should automatically redraw an elevation when a component is added, changed, or removed. If you suspect that the drawing does not reflect the change you have made, you can manually redraw an elevation by clicking the "Redraw" button in the Layout Tab.

To edit the Final Parts List, select Final Parts from Jobs=>Elevations in the Menu Tree.



### Parts List Pricing

An important key to producing a winning bid is accurate pricing of the components. That means both the number and types of parts need to be complete, plus the pricing and parts multipliers need to be current. WinBidPro allows you to enter and adjust the manufacturer's pricing and multipliers in both the vendor catalogs and on individual jobs.

**Tip:** Multipliers are the percentage in decimal form of the manufacturer's list price that you pay for their parts and materials. This is negotiated between you and the vendor, therefore the multiplier is initially set to 1—no change in the price—for new catalogs downloaded. You will need to ensure the accuracy of both the manufacturer's pricing and your multipliers.

When a job is created, a frame system is selected, entrances, doors, and parts are added, then the pricing and price multipliers are pulled from the Vendor Parts List. At that point this data is stored with the job and any changes for pricing and multipliers must be made in the parts list for that job. Any changes that you want to incorporate in the job either need to be in the Vendor Parts List before the job is created or added directly to the job. (Changes made to pricing and multipliers in a particular job's parts list will not be reflected in, nor affect, the Vendor Parts List.)

### Changing Multipliers in the Vendor Parts List

To edit multipliers for the vendor catalog for inclusion in future jobs, click the Parts List button under the Vendor menu in the left-hand Menu Tree as shown in the previous figure. (This is not to be confused with the Final Parts button under the Jobs=>Elevations menu in the same Menu Tree which will solely edit the parts for that particular job.)

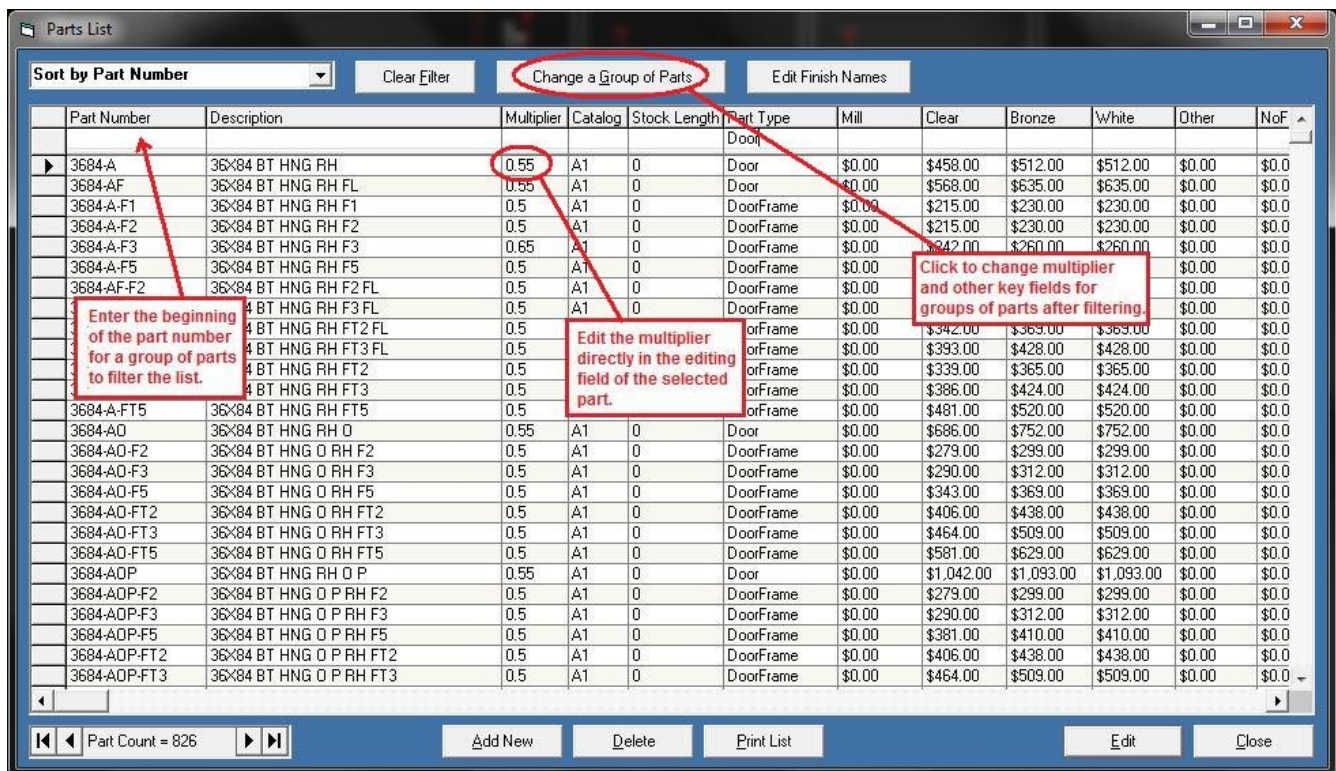


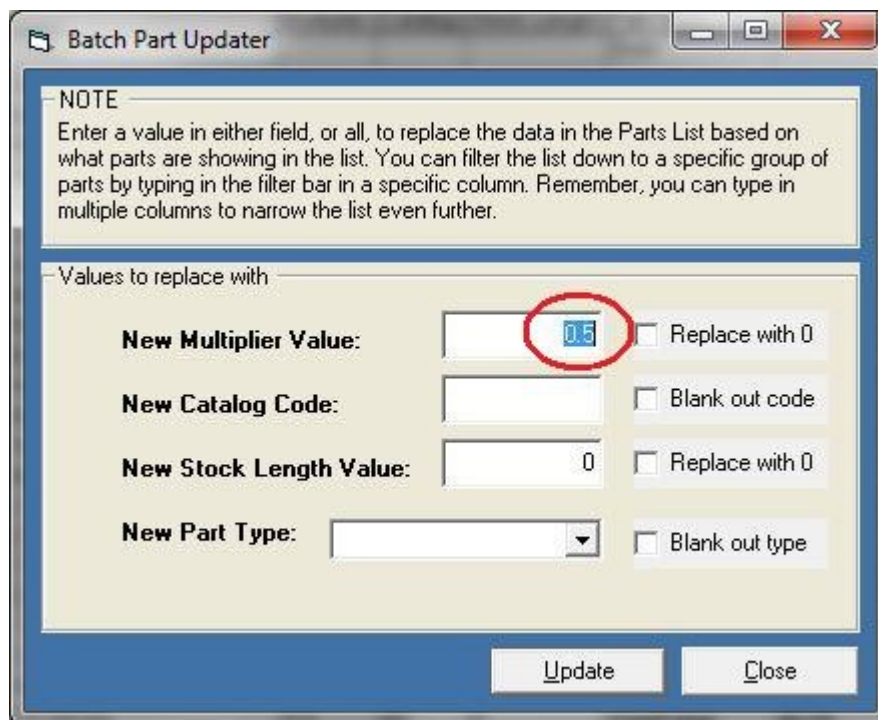
Illustration 49: To change a group of parts, enter the filter into the blank field above the appropriate column and click "Change a Group of Parts" to open the Batch Part Updater."

When the Parts List button is clicked, a window will open loaded with all the parts from the vendor catalog as shown in the figure below. While you can edit the individual multipliers for each part by entering it directly into the multiplier field for the part, it is more efficient to filter the parts list and update the multiplier as a group.

For example, if you want to change the multiplier for all of the doors and door frames on a parts list, type “door” in the blank field which appears just below the heading “Part Type.” This will filter out all parts except those which start with the word “door.” (Note: If you only want “DoorFrame”, then inputting “doorframe” will eliminate the doors from the filtered list. To return to the complete parts lists, click the “Clear Filter” button at the top of the window.) Imported v14 catalogs will not show data in the “Part Type” column since the older v14 program did not contain this information.

**Tip:** The drop-down menu in the upper left-hand corner of the window allows you to select different sorts for the parts which will change the order in which the parts appear depending upon the option selected.

Next, click “Change a Group of Parts” at the top of the window. This will open the “Batch Part Updater” window (shown below). The feature allows you to change values with one click for four parts fields (the Multiplier, the Catalog Code, the Stock Length Value, and the Part Type category) for the group of filtered parts. In the example shown, the New Multiplier Value will be changed to 0.5 for all the selected doors and door frames. Click Update and the window will close displaying the Parts List with the new values.



*Illustration 50: The Batch Part Updater allows the changing of multipliers, catalog codes, stock lengths and part type for a group of parts.*

### **Changing Multipliers in the Job Parts Lists**

To edit the parts list for the current job, click the Final Parts button under the Jobs=>Elevations menu of the Vendor menu in the Menu Tree as previously shown. The Parts List window will look similar to the Vendor Parts Lists except that only the parts which have been added to the job will be listed. (Changes made to the Job Parts List will only affect that job. The Vendor Parts List will remain unchanged.) The filtering and sorting will work in the same manner as shown previously for the Vendor Parts Lists, however only the multiplier can be updated with the Batch Part Updater window for a job.

### **Adding Labor Costs**

#### **Default Labor Rates**

When adding your labor rates to bids, those rates for all new jobs are taken from the Labor Defaults file. These rates are accessed by clicking the “Labor Defaults” link under “My Shop” at the bottom of the Menu Tree. The Labor Defaults Menu will open as shown below.



*Illustration 51: The Labor Defaults Menu allows access to entering and changing labor rate defaults.*

The menu is broken into two categories: “Fabrication and Installation Defaults” and “Glazing Labor Defaults.” When you click “Frame and Misc Hours and Rates” the “Frame Labor Hours and Rates” window (shown in the following figure) will open. This window is identical to the Job Frame Labor window except the “Elevations Totals” tab is not accessible in the defaults window.

Illustration 52: The default labor rates are added in the Frame Labor Hours and Rates window.

The Labor Rates are the rates per hour that you bid for each type of labor included in the job. To calculate the actual requirements of the job, the estimated labor time in minutes for each type of installation needs to be added to the defaults. (You will be able to later edit these initial values in a specific job.) The same is done for each type of fabrication and miscellaneous labor.

When WinBidPro calculates labor cost the total number of minutes required to do the job are converted to hours and multiplied by the appropriate hourly rate.

### Job Labor

When working with "Labor" listed under "Jobs" in the Menu Tree, the first time, "Elevation and Job Labor" is accessed the only option is to "Apply Labor Defaults." This is the point at which the values in the "Labor Defaults" will be added to the job. After adding the Labor Defaults to the job, the rates and labor times can be adjusted for the specific job within the Jobs Labor window. Any changes will be kept with the job unless you choose to reapply the defaults, in which case all of the job labor rates and times will revert to the default rates.

**Tip:** It's important to note that there is a "Frame Type" setting in the Framing System Parts window that is referenced by the labor portion of the program. Each Frame Type (Butt Glazed, Can/Stick, Curtain/Pressure Wall, Screw Spline, Shear Block, Impact System, and Other) maintains it's own set of defaults. You will need to set the default labor rates for each frame type. When you select a Framing System for an elevation, the labor calculations will look at the elevation framing systems to determine what frame type is being used, and when the labor defaults are applied. It then knows what rates and times to incorporate. The defaults for each frame type can be applied by clicking the Labor Frame Types arrows (first, previous, next, last) on each side.



## 10. Print Reports

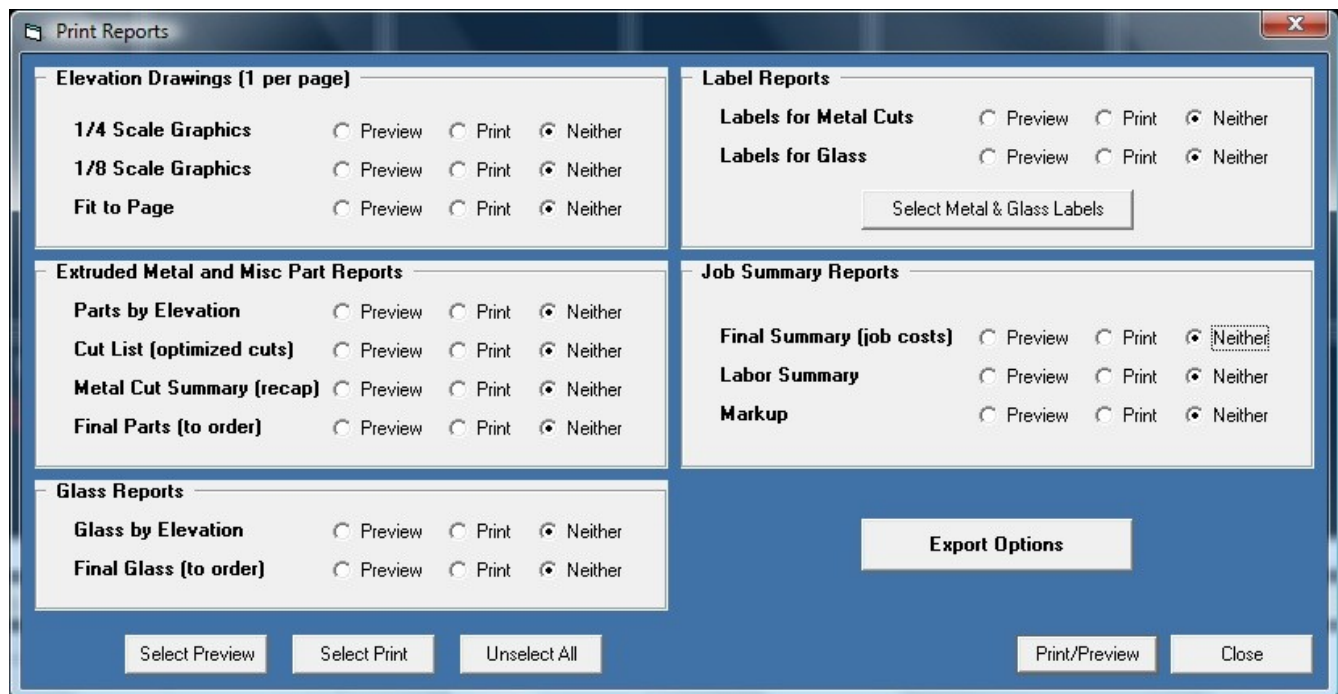
Once you have completed the details for all of the elevations in a job, run the optimizer and added the labor costs, the final bid and various parts and material lists can be viewed and printed.

### *The Markup Report*

The Markup Entry Form, “Markup” link is found under “Jobs” in the Menu Tree. This is a summary of all the job information which will appear in the Markup Report when viewed or printed. At this point, changes may be made directly to the final bid. You can add additional charges, set your markup percentages, sales tax, and any surcharge needed. Any calculated totals can not be changed, as these values come from the Final Parts, Final Glass, and Labor reports. If changes are needed in any one of these areas, you will need to make these changes at the source of this data. To preview the final Markup Report, click the “Print” button at the bottom of the window.

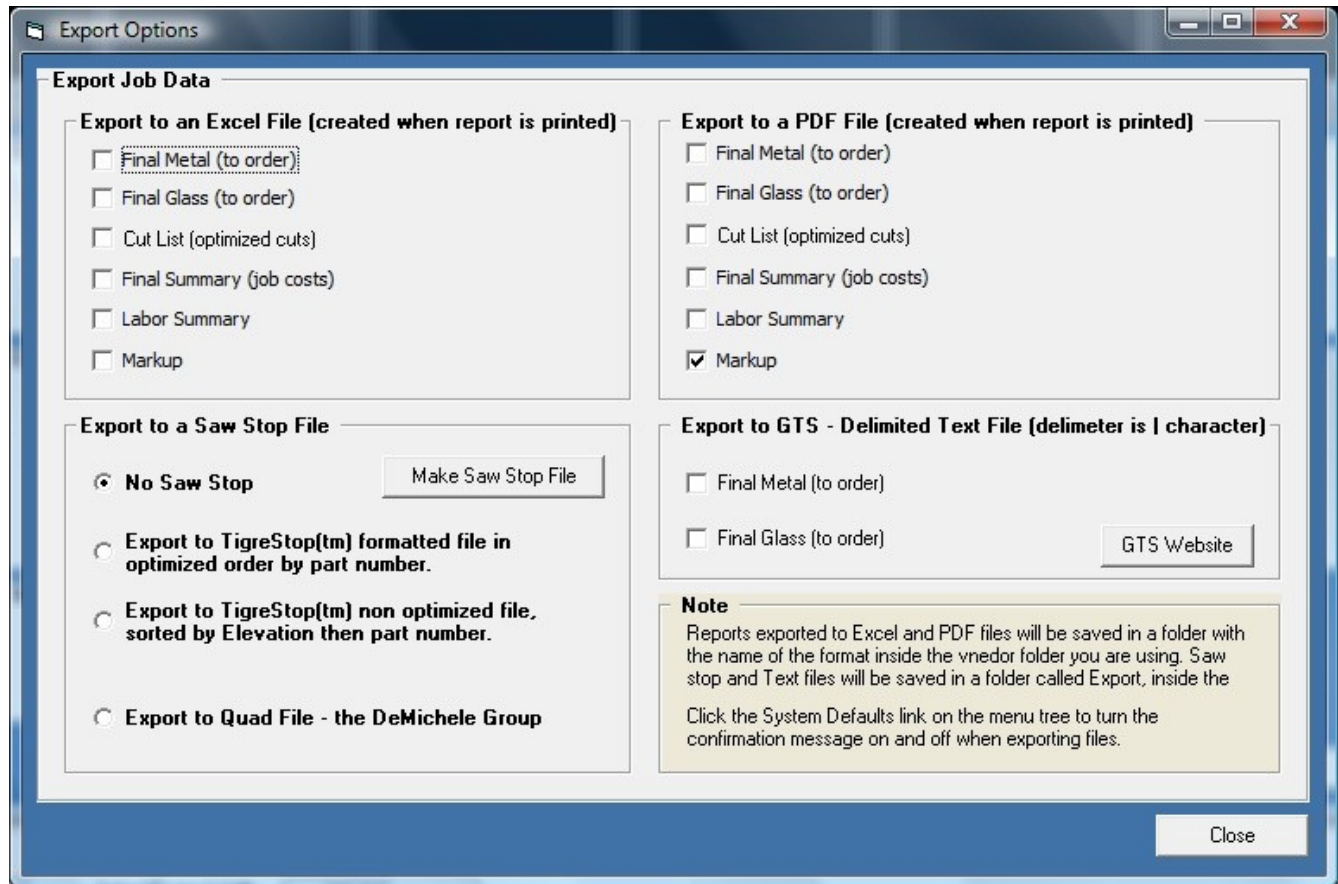
### *Print Reports*

“Print Reports” found in the left-hand navigation panel is a compilation of the major reports to be found in WinBidPro v15, including the elevation drawings and the Markup Report. See the figure below.



*Illustration 53: The Print Reports window allows the viewing or printing of any (or all) of the reports in WinBidPro.*

You can preview each report before printing or select designated reports for printing all at once. The “Select Preview” and “Select Print” buttons will opt to preview or print all of the reports. The “Export Options” button opens a window which offers more options for formatting the reports. See below.



The options are as shown above. When a report is checked in the “Export Options” window, the file will be created at the same time as when the report is printed in the “Print Reports” window. The new file will be found under the appropriate folder in the WinBidPro=>[Vendor] folder.

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