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## Instructions

- Installations
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- Creating categories
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## Editing employees

## Editing vendors

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## Importing Vendor

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## File Locations

## Assemble a project

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## Assigning Linking numbers

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## Conclusion

# I. Installation

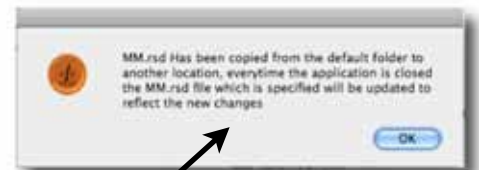
1. Download from [www.iwinbids.com/downloads.html](http://www.iwinbids.com/downloads.html)
2. Choose operating system, and download zip file (recommended placement on Desktop).
3. Unzip downloaded file (recommended placement on Desktop).
- 4.

## Windows:

Copy folder to program files. iWinBids.exe, and MM.rsd must be in the same folder.

## Mac OS:

Copy folder to applications.



# II. Setup

1. Double click on the application

Mac Users will see this.

2. A license expired Window may pop up. This window can be closed.
3. Agreement, check agree box, and press “Agree” button.



## Activation Window

4. Type in User name
5. Type in Email
6. Press “Trial” button if you have not received an Activation Key or Copy and paste your license key, and press “Activate”.

NOTE: Username, and email must match the emailed information.



Trial Window will open, and will show amount of days left till deactivation (Seen each time till licensed).

7. Press “OK” button

8. Welcome Window will open, click “OK” button.

9. Insert your company information (Displayed on reports).

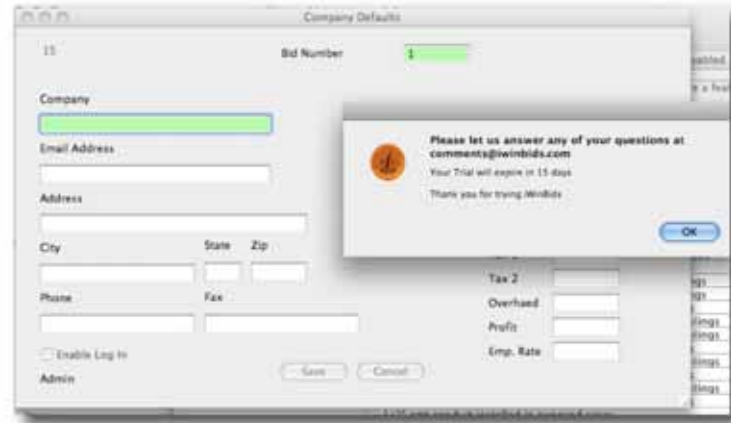
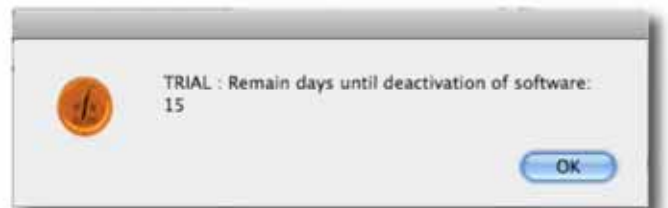
10. Insert your tax rates, and what you would like to use for your default overhead and profit.

Taxes are not applied to labor.

Taxes are not stacked.

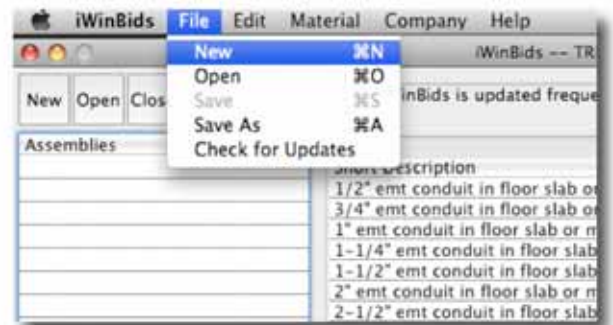
Overhead/Profit not stacked.

Recommended to modify bid number only during this initial setup. Changing bid number at any other time may cause errors when new projects are created.

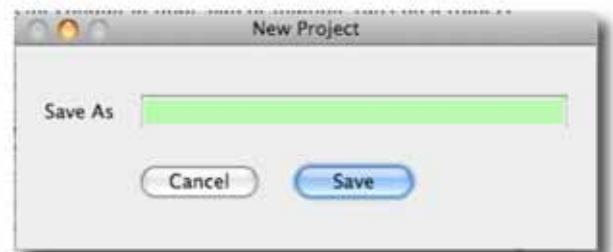


### III. Creating a new project

1. Choose File->New or Press “New” button in upper left corner.



2. Type in project name (one word, no spaces).



The file will automatically be appended with bid number following the name when the “Save” button is pressed.

3. Fill in the data for the project (Information will be displayed on reports)

4. Press “Save” button

Estimator for the project is shown in lower right.

“Extended Data” is optional.

Project name will show in lower left corner.

## IV. Creating material items

1. Choose Material->Material New from the menu

New Material Edit Window will open.

2. Fill in all information applicable.

Project quantity will likely be “1”

Units will likely be “ea”

Inventory if tracking inventory

3. Choose remove profit/markup/tax if required.

4. Press “Update Database” when finished

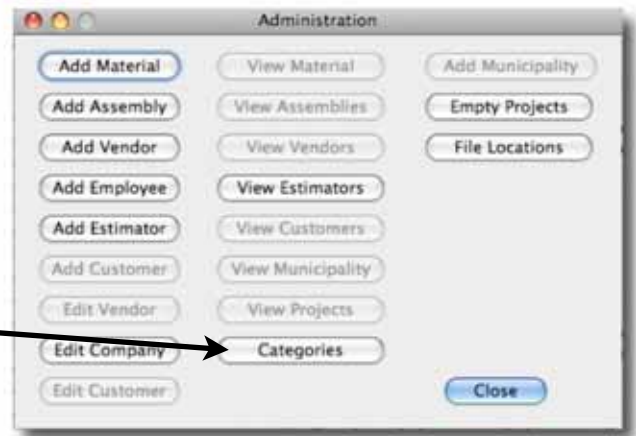
Item will show up at the end of the list of materials.

## V. Creating categories

1. Choose Company->Administration from menu

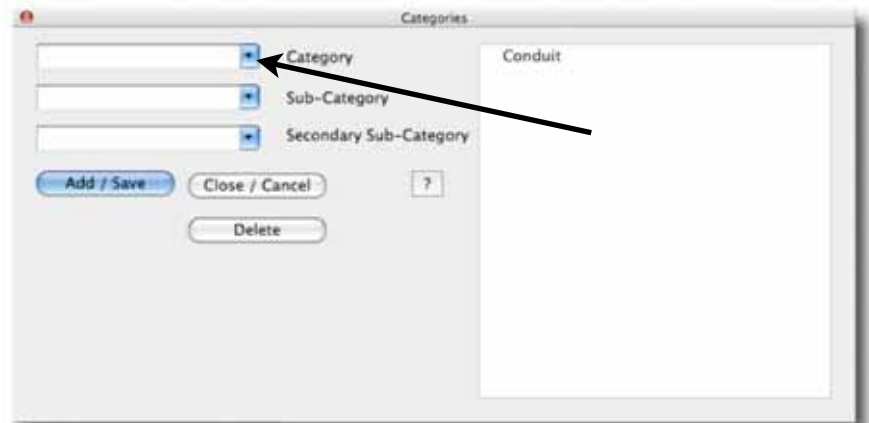
Administration Window will open

2. Press “Categories”



Categories Window will open

If no Categories exist, Conduit will be automatically created. You can see it by clicking the arrow by the text box at Category.



Category will be the First location in the Tree.

Sub-Category will be Second location.

Secondary Sub-Category will be Third.

### Example.

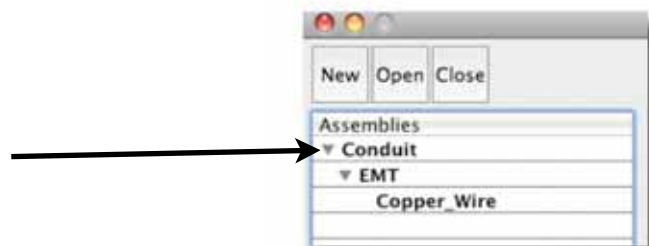
4. Conduit-EMT-Copper\_Wire

5. Shown after “Add/Save” Pressed, Conduit reselected from drop down, EMT selected, and Copper\_Wire Selected. Arrows press in display window.

6. Press “Close/Cancel” when finished, Items will show in Assembly Listbox on left.

7. Close Administration Window

8. Press Arrows next to each category in listbox.



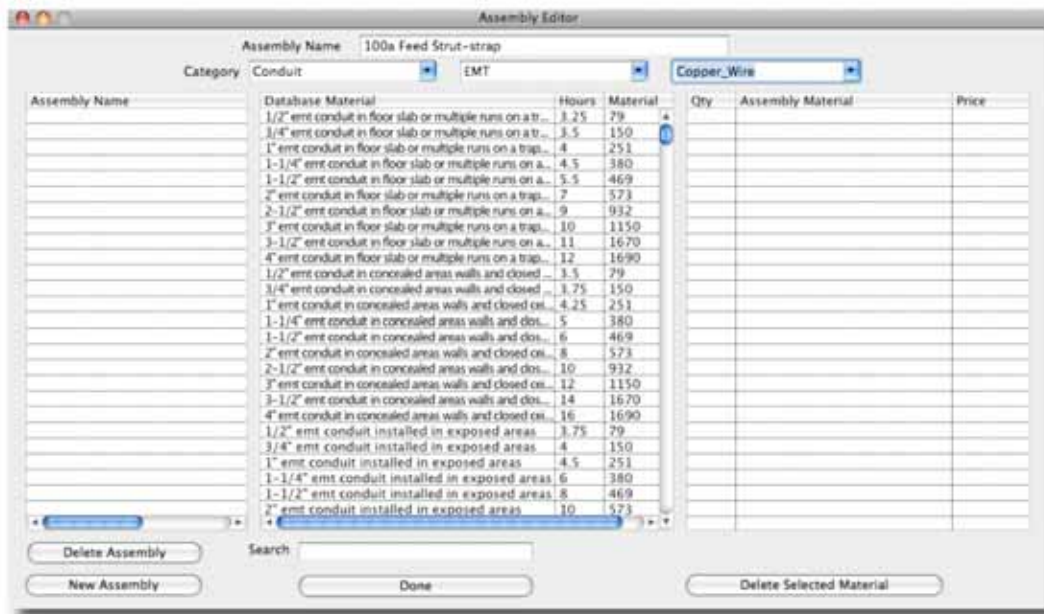
## VI. Creating assembly items

1. Choose Material->Assembly New from menu.

Assembly Editor Window will open.

2. Choose Category (Recommended to Create Categories prior-to creating assemblies), Sub-Category, and Secondary Sub.

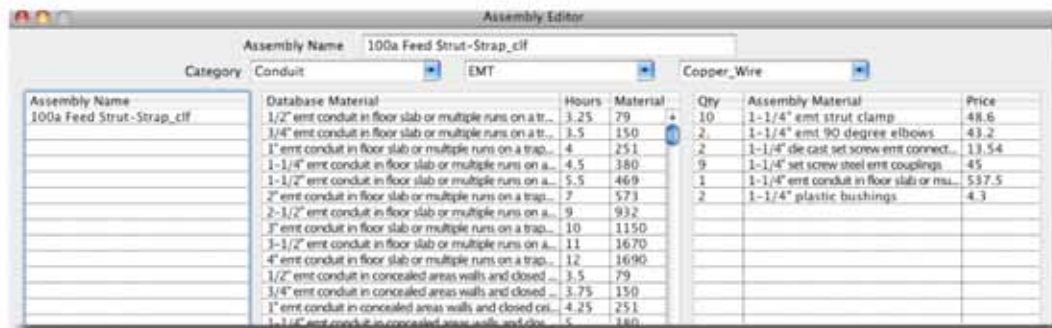
3. Change Assembly Name to match name of the new assembly. IE 100a Feed Strut-strap.



4. Choose items to be in assembly by double clicking a Database Material from the listbox.

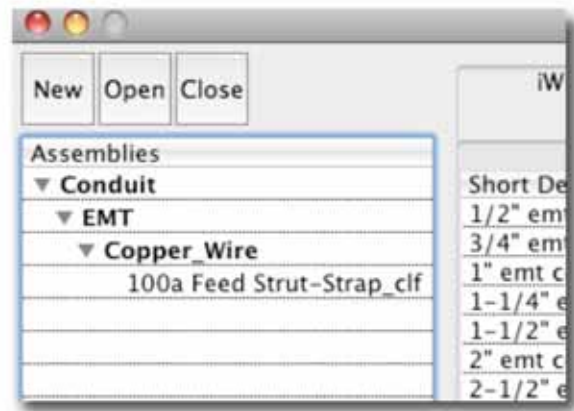
5. Insert Project Qty, and then by Pressing “Add to Assembly”, Items will be added to the right listbox.

After adding, Assembly Editor Window should look something similar to below.



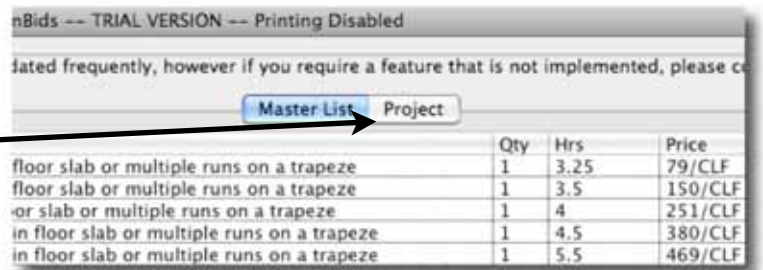
When Assembly Editor window is closed.

Item will be shown in Assembly listbox on left.



## VII. Creating rooms

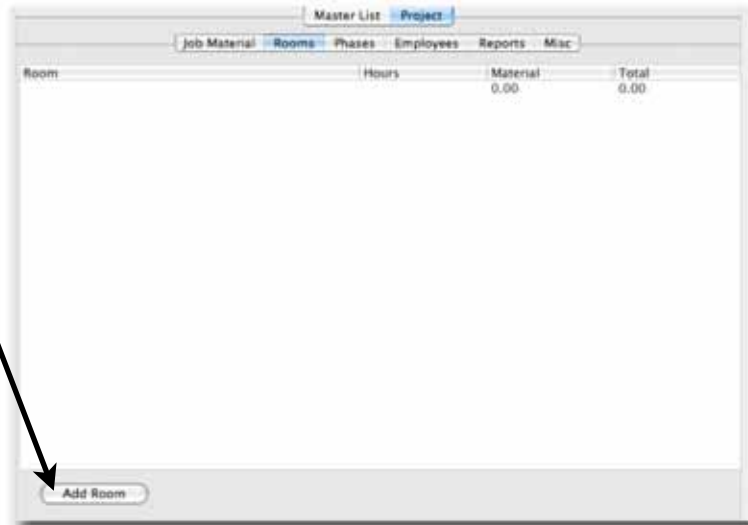
1. Choose the Project Tab.



2. Then Choose the Rooms Tab.



3. Press "Add Room" Button.





Rooms Editor will open up.

4. Insert Room Name.

5. Modifier can be changed if additional time will be needed for each material installed in this room.

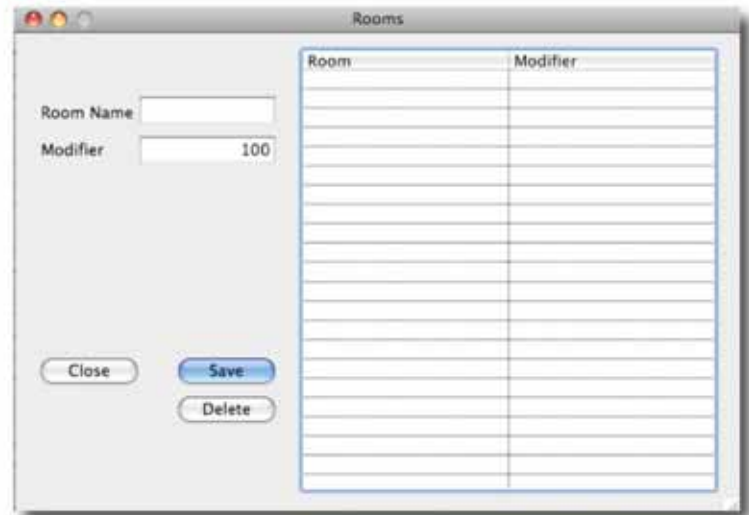
6. Press “Save” Button.

Room will show up in listbox on right.

7. Press “Close” when finished.

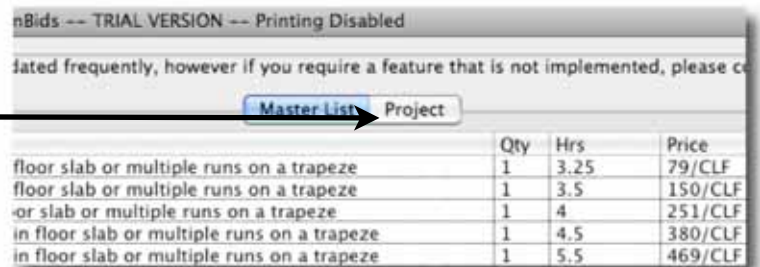
Rooms will be listed in Listbox for rooms.

When material is added to the project assigned to the room, the labor, and material prices will also be shown.



## VIII. Creating phases

1. Choose the Project Tab.



2. Then Choose the Phases Tab.



3. Press “Add Phase” Button.



Phases Editor will open up.

4. Insert Phase Name.

Modifier can be changed if additional time will be needed for each material installed during this phase.

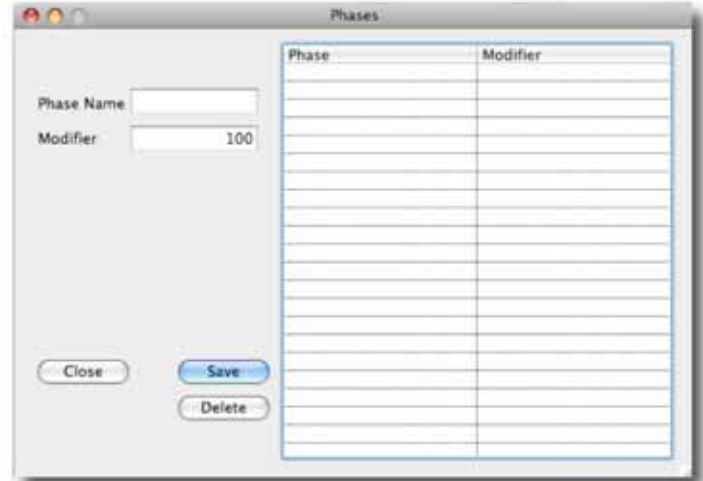
5. Press “Save” Button.

Phase will show up in listbox on right.

6. Press “Close” when finished.

Phases will be listed in Listbox for phases.

When material is added to the project assigned to the phase, the labor, and material prices will also be shown.



## IX. Creating conditions

1. Press Project Tab.



2. Press Misc Tab.

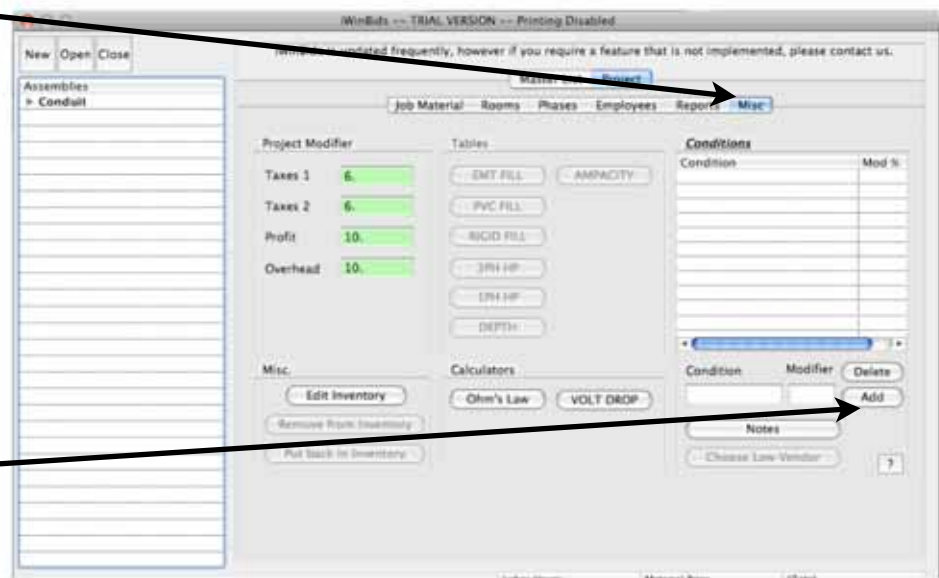
Conditions are on the right.

3. Name the Condition.

4. Insert Modifier (100) is standard,

(110) is 10% more labor.

5. Press “Add” Button.

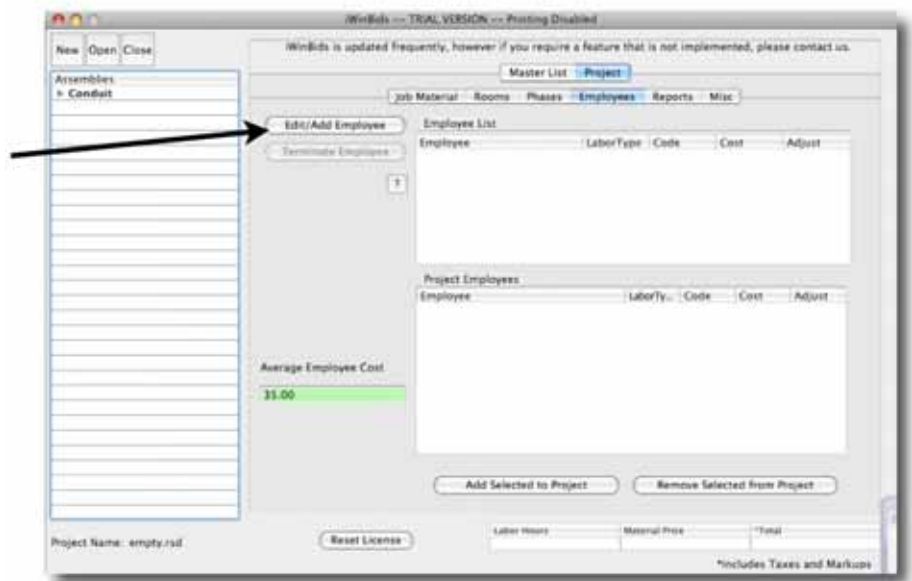


Condition will show up in table above.

# X. Creating employees

1. Press Employee Tab.

2. Press “Edit/Add Employee” button.



Employee Edit Window will appear.

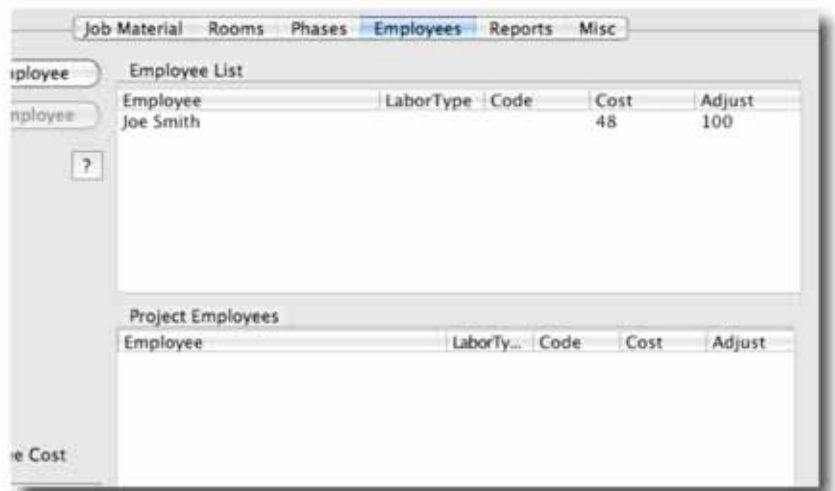
3. Items in green are required.

Other items will be used in future releases.

4. Press “Save” button when finished.



Employee will show up in Employee List.



# XI. Creating vendors

1. Choose Company->Administration from menu.

Administration Window will open.

2. Press “Add Vendor”.



Vendor Window will appear.

3. If this is the 1st vendor setup, Press “Vendor 1” Push Button.

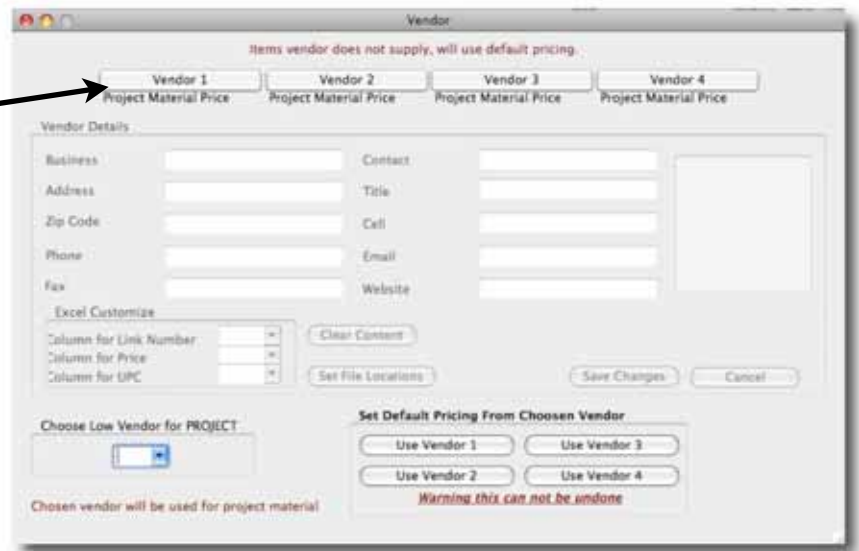
Vendor Details will then become available to edit.

4. Fill in all the text fields.

Excel Customization is explained in another section.

5. Press “Save Changes” when finished.

The Vendor Business name will then appear as the first push button.



## XII. Creating Estimators

1. Choose Company->Administration from menu.

Administration Window will open.

2. Press the “View Estimators” button.

3. Items in green are required.

Level 1 is the highest security level

Level 9 is the lowest security level

Level 1 can control all lower security levels

Security levels will be detailed in the future

A screenshot of the 'Estimator' window. It features a form on the left for entering details and a table on the right for viewing data.

**Name**

**Email**

**Cell Phone**

**Security Level**

**Password**

| Name  | Qty Bids | Won \$ | Pending \$ | Total Bid \$ |
|-------|----------|--------|------------|--------------|
| Admin | 2        | 0.00   | 0.00       | 1486.00      |
|       |          |        |            |              |
|       |          |        |            |              |
|       |          |        |            |              |
|       |          |        |            |              |

| Company | Project | Status | Hours | Amount |
|---------|---------|--------|-------|--------|
|         |         |        |       |        |
|         |         |        |       |        |
|         |         |        |       |        |
|         |         |        |       |        |
|         |         |        |       |        |
|         |         |        |       |        |
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|         |         |        |       |        |

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## XIII.Editing a project

The project must be open before editing.

1. Choose Edit->Edit Project.

Project Edit Window will show up.

2. Edit any details needed.

3. Press “Save” when finished.

The Project Edit window is a form with the following fields:

- Company
- Contact
- Email
- Address
- City
- State
- Zip
- Phone
- Fax
- Cell
- Bid Due Date
- Job Contact
- Job Address
- Job City
- Job State
- Job Zip
- Job Phone
- Job Fax
- Extended Data (button)
- Save (button)
- Admin (text field)

## XIV.Editing material items

1. Double click the material item to edit.

The Material Edit Window will open.

2. Change any fields available.

3. Press “Update Database” when finished.

The list will then refresh, and will be updated.

## XV.Editing assembly items

1. Double click the assembly item to edit.

The Add Assembly to Project Window will open.

2. Press “Edit Assembly” button.

3. Double click on the assembly again.

3. Modify as needed.

4. Press “Done” when finished.

5. Press “Cancel”.

The Add Assembly to Project window has the following components:

- Buttons: New Assembly, Edit Assembly
- Assembly Name: 100a Fixed Strut-Strap\_clf
- Table:

| Short Name  | Quantity | Hours |
|---|----------|-------|
| 1- 1/4" emt strut clamp   | 10       | 1     |
| 1- 1/4" emt 90 degree elbows                                    | 2        | 0.2   |
| 1- 1/4" die cast set screw emt connectors                       | 2        | 0.2   |
| 1- 1/4" set screw steel emt couplings                           | 9        | 0.9   |
| 1- 1/4" emt conduit in floor slab or multiple runs on a trapeze | 1        | 4.5   |
| 1- 1/4" plastic bushings  | 2        | 0.08  |

- Quantity:
- Condition:
- Room:
- Cancel (button)
- Add to Project (button)
- Page:
- Phase:

## XVI.Editing rooms

1. Open Rooms tab.
2. Press “Add Room”
3. Edit as needed.
3. Press “Cancel” when finished.

The list in main Window will refresh after each change.

## XVII.Editing phases

1. Open Phases tab.
2. Press “Add Phase”
3. Edit as needed.
3. Press “Cancel” when finished.

The list in main Window will refresh after each change.

## XVIII.Editing conditions

1. Open Misc tab.
2. Double click on the condition to edit.
3. Press “Delete”
4. Re-create condition with modifiers
5. Press “Add”

## XIX.Editing employees

1. Open Employees tab.
2. Double click on the Employee to edit.
3. Edit as needed.
4. Press “Save”



## XX.Editing vendors

1. Choose Company->Administration from menu.

Administration Window will open.

2. Press the “Edit Vendor” button.

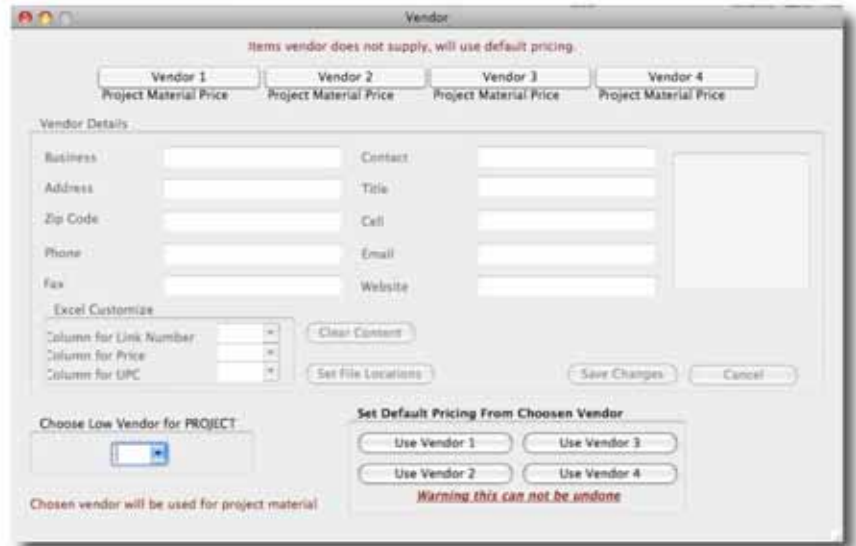
Vendors Window will open.

3. Items in green are required.

4. Press the Vendor you would like to edit

5. Edit as needed

6. Press the “Save Changes” button.



## XXI.Editing estimators

1. Choose Company->Administration from menu.

Administration Window will open.

2. Press the “View Estimators” button.

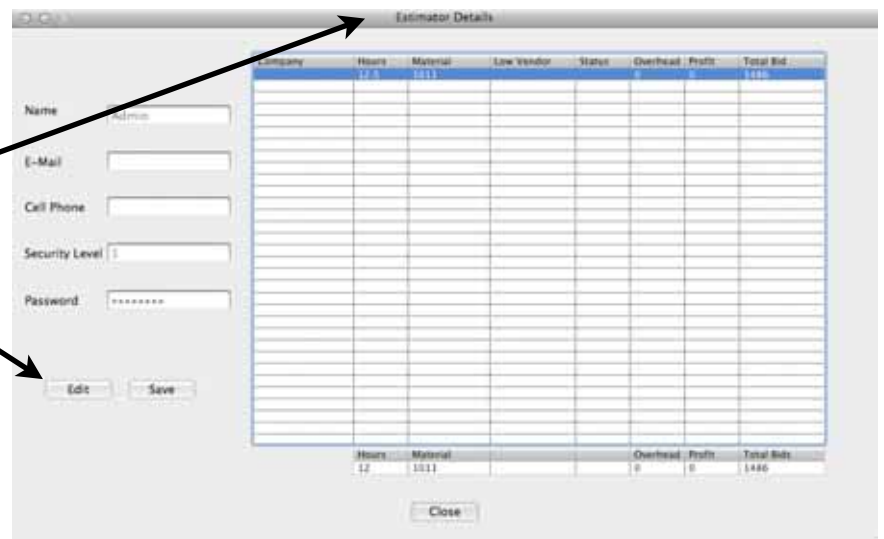
3. Double click on the estimator to edit

Estimator Details will open.

4. Press the “Edit” button.

5. Edit as needed.

6. Press the “Save” button.



## XXII.Importing Vendor

1. Process changing, new instructions coming soon.

## XXIII.Synchronize Vendor

1. Process changing, new instructions coming soon.

## XXIV.File Locations

1. Process changing, new instructions coming soon.

## XXV.Assemble a project

- 1.

## XXVI.Searching material

- 1.

## XXVII.Add material

- 1.

## XXVIII.Add assembly

- 1.

## XXIX.Assign Estimator

- 1.

## XXX.Reset Projects

- 1.

## XXXI.Delete Items from Assemblies

- 1.

## XXXII.Delete Categories

1.

## XXXIII.Delete Item from project

1.

## XXXIV.Updating old project

1.

## XXXV.Importing new material

1.

## XXXVI.Assigning Linking numbers

1.

## XXXVII.Adjust Tax

1.

## XXXVIII.Choosing vendor

1.