

ABOUT BQS:

- BQS = Bid/Quote System. It is a separate system from the JD Edwards system. It's more user friendly, and is designed to manage contract pricing and rebate processing.
- All bid numbers are 7 characters long – you must enter all 7 numbers in order to access a bid/quote, i.e. 0000239 or 0045502
- Bid vs. Quote
 - Q = Quote

Quotes are designated with a “Q” in the B/Q box, and are price “quotes” which are valid for 60 days only. All new entries into BQS are Active Quotes (Q). If the customer accepts the pricing and terms, he must sign and return the Quotation Confirmation within 60 days, indicating his intent to service the account. Otherwise the quote will be deleted after 60 days, and pricing is considered null and void. Once accepted by the customer, it becomes an active “Bid”. All signed copies are filed and maintained for a period of up to 5 years.
 - B = Bid

Bids are valid contracts or deviations, with a price guarantee period – see “End Price Guarantee Period”. It is considered an active piece of business for which POD's (Proof of Delivery) must be submitted in order for rebates to be paid.
- Valid quotes and bids must be in an Active status (A). Anything in a Delete status is not valid.
- Bids must maintain 50 case usage per month to remain active. Note that the Bid Policy indicates 100 cases/month usage, but we try to accommodate business that's just getting started, etc.
- Extend means “roll-over” at same price. Prices do not change when a bid is extended.
- Tracking is the term used for the “usage” that's generated against a bid via POD processing or via direct ship.
- Bids that are drop shipped or net-billed are maintained in the JDE system (where order processing takes place). JDE bid numbers are always preceded with “J” and can be viewed in BQS but are maintained in JDE.
- Smart Code vs. JDE code – the Smart Code is the old Covalence or RollPak code. This is the code that makes sense to the customer. The JDE code is a 6 digit numeric code and is the code used in the JD Edwards (JDE) manufacturing system, which is the main frame.

Bid Class and Bid Type Codes:

All Bids/Quotes must be assigned a Bid Class and Type. It is a required field in the Bid/Quote Header.

- **Bid Class – indicates whether programs paid or not:**

- Net of Programs – Public
- Net of Local Programs
- Net of Programs – Deviated
- Programs Paid
- National Acct.

- **Bid Type – indicates type of business:**

- Blanket
- Casinos/Resorts
- Food Service
- General Industry
- Healthcare
- Maintenance
- Municipal or Government
- Other
- Schools

How the bid/quote process works:

- Sales reps have access to distributors and all bid/quotes in their territory only. Sales reps can enter new quotes, or make changes to existing bids or quotes, pending approval by the Special Pricing Department. Each time a bid or quote is accessed, the system logs the user-id and the “Signed” box will indicate “Not Approved”. Once approved, the Special Pricing Department will change the name in the signed box to Lisa Curry, Special Pricing Manager, or to one of the Pricing Coordinators.
- Rep may also be able to email copies of any bid/quote once it’s been approved (signed and authorized).
- All rep actions in BQS **MUST** be documented & dated in the ‘**Internal Notes**’ Box. The system will not allow you to proceed unless the notes are properly entered.
- Rep must wait for approval from Monroe – will be notified via email confirmation (customer and office copy).
- Customer copies are also emailed in an automated fashion, with a copy going to the sales rep as well. It is the rep’s responsibility to provide us with up to date information, i.e. proper contact name and email address.

NEW BQS GUIDE

URL / Web Address: *bqs-inst.berryplastics.com*

Enter Username:

Enter Password:

Click Sign In.

Menu Options

SALES FORCE:

AGENCY – View Regional Manager and Salesman associated with Agency

REGION – View Agencies associated with each Region

SALESMAN – View salesman names and numbers, as well as email address for bid/quote

END USERS:

END USER SUPER GROUP – View Super Groups such as Premier, Amerinet, etc.

END USER GROUP – View sub-groups of Super Groups, such as Daughters of Charity associated with Premier

END USER DETAIL – View End Users and ID numbers associated with Groups and Super Groups

DISTRIBUTORS:

DISTRIBUTOR MASTER - View or Look up distributor number, verify address and email address

ITEMS:

ITEM MASTER DETAIL - View or Look up JDE Item codes, Description, Item Price Group, Weight, Stock/Special/Private Label, Pallet Count

ITEM PRICE GROUP - View Item Price Groups, which are like product & size categories (as matched to guideline sheet)

ITEM X-REF - View or Look up item equivalents, i.e. Covalence and RollPak Smart code to new JDE code.

BIDS (Bid/Quote Master)

- Look up bids or quotes to view or edit
- Enter new bids or quotes
- View, edit items, or add items
- Email bid or quote
- Child Tables:
 - Distributors in Bid - view the distributors authorized on the bid
 - End Users in Bid - view the list of end user accounts associated with the bid
 - Internal Notes – view history of process notes

Note that you are only able to make changes in the Bid Menu. You will not be able to make changes to any of the other Menus, such as Distributor Master or Item Master. Please report necessary changes to the Special Pricing Department.

How to Look up existing bids/quotes

Click the Bids Menu. From here, you can query by simply placing a value in any field. In the 1st box, you can search by:

- Bid or Quote number – you must enter 7 digits always, for example, 0010707 or 0000017, not 10707.
- Distributor Number (must be the BQS distributor number).
- Bid or Account name – enter a partial account name, for example, type 'Worth' to search for "City of Ft. Worth", or 'Providence' when searching for "Providence Hospital".

When searching by Distributor No. or Account Name, you can narrow the search down by filtering the drop down boxes, i.e. "BorQ" – set to Q (quotes), "Status" – preset to A, "Bid Class" or "Bid Type", "Salesman No", or "End Price Guarantee Period" date range.

Click the GO button to initiate the search. The results will be listed in the table below the search application.

Bid Quote System

Bid Quote Detail

Search (BidNo, DistrNo, Account) Search (ItemNo, SmartCode)

BorQ Status

Bid Class Bid Type

Is Price Guaranteed Salesman

Expiry Date to Signed

Bid Open Date to Bid Accept Date to

Start Price Guarantee Period to End Price Guarantee Period to

Last Modified By Date Last Modified to

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BidNo	Account	Distr No	Distr Name	Distr Group	BorQ	Status	Bid Class	Bid Type	Bid Open Date	Bid Accept Date	Expiry Date	Is I Gu
0039536	METROPOLITAN SCHOOLS-NASHVILLE	C43138	INSTITUTIONAL WHOLESALE		Q	A	Net of Programs - Public	Healthcare	7/6/2009			Yes
0050202	METROPOLITAN	J04374	GORDON FOOD		Q	A	Net of	Healthcare	6/12/2009			Yes

You will see 3 buttons next to the bid details – Edit Record, View Bid Items or Edit Bid Items. Typically, you will click “Edit Record” for the appropriate bid or quote. It is important to note the “BorQ” column and the “Status” column. If you did not specify Bid or Quote, or Status “A”, the search will display all active bids or quotes as well as deleted bids or quotes. Remember that we will only process POD rebates against Active Bids. A valid quote must be in an Active status as well. Quotes are active for 60 days only, so if it’s deleted, then it means that 60 days has expired since it was quoted. You can determine the date quoted by looking at the “Bid Opening Date”.

Bids are Active for the life of the contract (start and end dates). All active bids are reviewed 30-60 days prior to its’ expiration, at which time it must be renewed or deleted. Typically we determine this based on the account’s usage. If it has generated no usage, it is automatically deleted. If the bid has generated usage and is on-going business, it will remain Active. It will either be rolled over or updated with new pricing. If re-priced, the guidelines are determined by corporate and will be communicated accordingly on the expiring bid report.

EMAIL OPTIONS

You can request copies of any bid that has been authorized or signed off on by Berry’s Special Pricing Manager or Special Pricing Coordinators. If a bid has not been authorized in Monroe, then you will not be able to email it. Y

Click the EMAIL BID button. You can type in up to 3 email addresses (one will be preset to your email address). Click SEND EMAIL. You will see a message at the bottom of the screen indicating that the Bid Confirmation was successfully sent. Then click BACK TO BID HEADER.

How to look up items

Click the Items Menu. You can search either the Item Master or the Item X-ref.

- Item Master – only looks for JDE codes. You can search by item code or by item description. You can narrow the search down by filtering for Stock or Specials, active or inactive items, etc. Inactive items are items with a 0 weight (which you wouldn't want to quote). The Active button defaults to Active only.

Note: When searching by the Item description, you can enter a partial description, for example, '23x25', or if you're looking for a particular color 'Orange', in order to view all of the items with the word "Orange" in the description.

Click GO. The results are displayed in the table below the search application. You must then use the Cross Reference Table to look up the corresponding Smart Code.

The screenshot shows the 'Item Master Detail' page in a web browser. The search criteria are: Item No. 40x46, Stock or Special All, Price Group All, and Active Yes. The results table is as follows:

Item No	Item Description	Stock or Special	Price Group	Price Group Desc	Net WT	Floor Price	Source	Active
620425	40X46,11MIC,BLK,25/RL10/CS		RPWH-RF-25+LG	25" + RP WORKHORSE - RIGHT FIT - LARGE	13.6	\$0.84	J	Yes
620426	40X46,11MIC,BLK,25/RL10/CS		RPWH-RF-25+LG	25" + RP WORKHORSE - RIGHT FIT - LARGE	13.6	\$0.84	J	Yes
620427	40X46,11MIC,BLK,25/RL10/CS		RPWH-RF-25+LG	25" + RP WORKHORSE - RIGHT FIT - LARGE	13.6	\$0.84	J	Yes
620428	40X46,11MIC,NAT,25/RL10/CS		NONE	NONE	13.6	\$0.00	J	Yes
620429	40X46,11MIC,NAT,25/RL10/CS		NONE	NONE	13.6	\$0.00	J	Yes
620430	40X46,11MIC,NAT,25/RL10/CS		RPWH-RF-25+LG	25" + RP WORKHORSE - RIGHT FIT - LARGE	13.6	\$0.84	J	Yes
620431	40X46,11MIC,NAT,25/RL10/CS		RPWH-RF-25+LG	25" + RP WORKHORSE - RIGHT FIT - LARGE	13.6	\$0.84	J	Yes
620432	40X46,11MIC,NAT,25/RL10/CS		RPWH-RF-	25" + RP WORKHORSE - RIGHT	13.6	\$0.84	J	Yes

- Item X-ref – looks for Smart code as well as JDE code. You can search by smart code, JDE code or by item description. You can narrow the search down by filtering for Stock or Specials, active or inactive items, etc. Inactive items are items with a 0 weight (which you wouldn't want to quote). The Active button defaults to Active only. You will note one additional filter, and it's for a "Type code". The Type codes are used to designate Smart codes from customer codes. It defaults to ALL, so if you want to narrow it down to Smart codes only, then change it.

Note: When searching by the Smart code or item description, you can enter a partial code or description, for example, 'HR242406' or '24x24'. If you're looking for a particular color 'Orange', just type orange to view items with the word "Orange" in the description.

Click GO. The results are displayed in the table below the search application. You will note in the example that you can easily determine which items are stock vs. special.

Bid Quote System

Search (Old Item No, New Item No, Item Desc)

Stock or Special: Price Group:

Type Code: Active:

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	Old Item No	New Item No	Type Code	Item Desc	Price Group	Net WT	Floor Price	Stock or Special	Item Source	Active
<input type="checkbox"/>	CHR242406GR	<u>714168</u>	Smart Code	24X24.6MIC,MTGRN,50/RL20/CS	HDR-COL17-24SM	8.8	\$1.98	special	J	Yes
<input type="checkbox"/>	CHR242406N	<u>698754</u>	Smart Code	24X24.6MIC,NAT,50/RL20/CS	HDR17-24SM	8.8	\$0.93	special	J	Yes
<input type="checkbox"/>	CHR242406PN	<u>619061</u>	Smart Code	24X24.6MIC,NAT,50/RL20/CS	HDR17-24SM	8.7	\$0.93	special	J	Yes
<input type="checkbox"/>	CMHR242406B	<u>710037</u>	Smart Code	24X24.6MIC,BLK,50/RL20/CS	HDR17-24SM	8.79	\$0.93	special	J	Yes
<input type="checkbox"/>	CMHR242406N	<u>710017</u>	Smart Code	24X24.6MIC,NAT,50/RL20/CS	HDR17-24SM	8.79	\$0.93	special	J	Yes
<input type="checkbox"/>	HR242406B	<u>619106</u>	Smart Code	24X24.6MIC,BLK,50/RL20/CS	HDR17-24SM	8.79	\$0.93	stock	J	Yes
<input type="checkbox"/>	HR242406N	<u>619102</u>	Smart Code	24X24.6MIC,NAT,50/RL20/CS	HDR17-24SM	8.79	\$0.93	stock	J	Yes

DISTRIBUTOR MASTER:

Click Distributors Menu, then Distributor Master. Here you can search by Distributor number or name – this is how you look up address and contact name information, etc. You can narrow the search down by using any of the filters, for agency, salesman, etc. However, remember that you're only able to see distributor information that's under your assigned agency or salesman number. Please note that you can not make any changes to the Distributor master. You must submit all Change requests to the Special Pricing Department in Monroe.

Bid Quote System

Distributor Master Detail Salesman

Search (Distr No, Distr Name)

Stock Transfer Group

Agency No Region No

Salesman Active

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Distr No	Distr Name	Distr Group	Stock Transfer Group	Agency No	Region No	Salesman	Address Line 1	Address Line 2	Address Line 3	Contact	Email Address 1	Email Address 2
C65959	JANPAK/LIND PAPER - DALLAS	JAN		632	365	029	WAREHOUSE/RECEIVING	3101 HIGH RIVER ROAD STE. 101	FORT WORTH TX 76155	JANPAK--DALLAS		
C65961	JANPAK - HOUSTON	JAN		632	365	030	ATTN:ERICA ARDOIN	6356 CLARA ROAD SUITE 100	HOUSTON, TX 77041	JANPAK-HOUSTON		

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End Users:

Search by End User Super Groups (i.e. Premier, Amerinet), End User Groups (Sub groups of the Super Groups, i.e. Daughters of Charity), or by End User Detail. Most likely, you will use the End User detail search in order to determine if a particular hospital is part of the Premier group, etc. See the example below. The search was for end user name “St Luke”, and in the table underneath, it displays all of the hospitals named “St. Luke”, which End User Group they’re a member of, the address, end user number (or entity code), etc.

The screenshot shows a web browser window titled "Enduser Detail - Windows Internet Explorer". The address bar shows the URL: `http://edcdev009/BQSDev/ENDUSERDETAIL/ShowENDUSERDETAILTable.aspx`. The search criteria are as follows:

- Search (EndUserNo, EndUser Name, AddressLine1, AddressLine2, AddressLine4): St Luke
- Super Group: All
- Group Number: All
- AddressLine3: All
- Active: Yes

The search results are displayed in a table with the following columns: Super Group Number, Group Number, End User Number, End User Name, AddressLine1, AddressLine2, AddressLine3, AddressLine4, and Active. There are 22 items in total, with 10 items shown on the current page.

Super Group Number	Group Number	End User Number	End User Name	AddressLine1	AddressLine2	AddressLine3	AddressLine4	Active
AmeriNet	AmeriNet	41708	"ST LUKE'S PATHOLOGY ASSOCIATES, P.A."	8000 W 110TH ST STE 210 "C/O J	OVERLAND PARK	KS	66210	Yes
AmeriNet	AmeriNet	64292	ST LUKE'S SURREY PLACE A/B/OF ST. LUKE'S HEALTH CO	14701 OLIVE BOULEVARD	CHESTERFIELD	MO	630172221	Yes
MedAssets	MedAssets	24622	Clinic Pharmacy - The Woodlands	17350 St Luke's Way, Suite 150	The Woodlands	TX	77385	Yes
MedAssets	MedAssets	48805	Intermountain Orthopaedics St Lukes Meridian Cente	520 S Eagle Rd Ste 2209	Meridian	ID	83642	Yes
MedAssets	MedAssets	64230	Kelsey Seybold, St Luke's Medical Towers	6624 Fannin St	Houston	TX	77030	Yes
MedAssets	MedAssets	67379	St Lukes Hospital	801 Ostrum St	Bethlehem	PA	18015	Yes
MedAssets	MedAssets	69773	Cancer Care Ctr-Montgomery E	300 St Lukes Dr	Montgomery	AL	36117	Yes
MedAssets	MedAssets	76738	Carroll Lutheran Village	300 St Luke Cir	Westminster	MD	21158-4174	Yes
MedAssets	MedAssets	7859	St Lukes Hospital Deslodge Outpatient Center Mater	121 St Lukes Center Drive	Chesterfield	MO	63017	Yes

STEPS FOR ENTERING NEW QUOTES:

- Click the Bids Menu and “Bid Master”.
- Click the “Add” button in the middle tool bar.
- Enter the data as follows (please use CAP LOCK and note that some of the boxes are blanked out so you can not enter any data in these boxes):
 - ACCOUNT NAME = End User or bid name
 - DISTRIBUTOR NUMBER = customer number
 - B/Q = Q (all new entries are Quotes). Select Q from the drop down box.
 - Skip STATUS - defaults to A.
 - BID CLASS = Select from drop down box.
 - BID TYPE = Select from drop down box.
 - BID OPENING DATE = usually current date or date that bid is opened (if public)
 - Skip BID ACCEPT DATE (used for active bids only)
 - IS PRICE GUARANTEED? = Y (if there are contract dates) or N (if no guarantee)
 - START PRICE GUARANTEE PERIOD = Contract Start Date
 - END PRICE GUARANTEE PERIOD = Contract End date
 - SALESMAN # = Salesman number used for Bid/Quotes
 - PRICE ESCALATION – if applicable, i.e. 20% max from 7/1/10 to 12/31/10.
 - EXTERNAL NOTES = include any information that you want the customer to see, i.e. “FOB Seattle, WA”
 - INTERNAL NOTES – this is a required field – you MUST include the following:
*price point requested, competition and volume. Include any additional information that is for office use only (that you don’t want the customer to see). One example is: *\$.97/lb (D+4) competition Inteplast – 100/month – won bid last year*
- When complete, click the “Save” button at bottom of page and write down the quote number.
- Enter items next - Click “View Bid Items” or “Edit Bid Items”.
 - Click the “Add” button on the Tool Bar.
 - Click Item Type - select Existing item or New Custom
 - For an existing item, enter the JDE item code in “Item No” box OR enter the Smart code in the “Smart Code” box
 - Select Gross Price of Net Price. If the quote is programs paid, then you will want to click Net Price, and allow the system to gross up for customer programs which are stored in the database.
 - Then enter the “Price Per lb (Net)” Or enter the “Price Per Case Net”. The system will calculate price/case if you enter price/lb. If you enter case price, the system

will calculate the price/lb. Notice that the pricing is immediately calculated for both gross and net.

- Enter the "Price Eff Date".
- Enter the quantity (typically this should be the qty for the bid period, so if you know it's 100/month for this item, and the bid period is for 90 days, you would enter the qty. as 300).
- Enter any external or internal notes pertaining to the item.
- Click "SAVE and NEW" if you have more items to enter. Otherwise, just click "SAVE".
- Go to next item and enter accordingly.

IMPORTANT: Notes about line items/item codes:

- ❖ A specific item number can only be entered once. If you type the same item code twice, you will get an error message.
- ❖ To delete an entire line item, click "Select" next to the line item and then click the "Delete" button.

▪ **ENTERING SPECIALS / Custom Items:**

1. For Item Type, click "New Custom".
2. Enter "Special1" in the Item No. Box. Number each one if entering more than one special or custom item.
3. Click "NOTE CREATOR".
4. In the Note Creator Dialog box, select LLDPE or HDPE. Select the appropriate resin blend from the RESIN drop down box - contact Special Pricing if you need assistance, however note that there are RollPak blends listed separately.
5. Select the seal type. Then fill in each box with the necessary data for width, length and gauge. Use the drop down box to select mil or mic. Enter pack (i.e. 100 pk), and use the drop down box to select flat pack, coreless or cored roll put-up. Enter color and price/lb. (remember to add any applicable upcharges).
6. Click "CREATE NOTES". The weight and price/case calculations are automated. Note that the item description now appears in the external note box, and the item specs & price/lb. are listed in the internal note box.
7. Now you just have to enter the price effective date and quantity.
8. Click "SAVE and NEW" or "SAVE".

Note - the Special Pricing Dept. will add the 3 pallet minimum on all customs. If you enter an existing custom item code such as "R23BX", then it requires a 2 skid minimum, and Special Pricing will include it. A system upgrade will soon automate the pallet minimum process.

9. After all items have been entered, click the BID HEADER button to return to the beginning, or click VIEW BID ITEMS.

10. You will not be able to email customer or office copies until approved in Monroe . Wait for an e-mail confirmation from SPD in Monroe.

AUTOMATED PRICING OPTIONS:

Click “Bid Pricing” Menu.

CHANGES TO EXISTING BID OR QUOTE RECORDS

You can update any existing bid or quote, **except** for the following processes that must be managed in Monroe :

1. *Expiring bid updates*
2. *Rescinding price increases or decreases.*
3. *Modifying contact name in the distributor name & address tables*
4. *Modifying price history of an item.*

For these type modifications, you must notify the Special Pricing Department.

STEPS FOR REVISING A BID OR QUOTE:

1. Click Bid/Quote button on the Tool Bar.
2. Enter the bid or quote number in the appropriate box (remember to precede with 0's so that you enter a 7 digit number)
3. Document and record actions and user initials in the **Internal Note** box and precede and end each note with an asterisk (*), i.e. *9/20/08 add items / LM*
9/20/08 \$ changes / LM
9/20/08 add end users / LM
9/20/08 chng contract dates / LM

For Price Changes – CLICK ‘EDIT BID/QUOTE ITEMS’ BUTTON ON THE TOOL BAR

D

1. Position to the specific item number you wish to revise, and Click Select. Note that all items are listed in numerical order. You may have to go to another page. Page numbers are at the bottom.
2. Enter price/lb, then TAB to enter price effective date (usually the same date as documented in the notes). If you enter price/case, remember that you must change the price/lb to 0 first, then enter the requested price/case.
3. Be sure there's something in the Qty. box. If it's 0, you must change it to at least 25. The system requires a monthly quantity for each item.
4. Click the SAVE button.

Adding Items - CLICK ‘EDIT BID/QUOTE ITEMS’ BUTTON ON THE TOOL BAR

1. Type the item code in "Item Number" box.
2. Tab to "Price/lbs." Or to "Contract price" column and enter data. The system will calculate price/case if you enter price/lb. If you enter price/case, remember that you must change the price/lb to 0 first, then enter the requested price/case.
3. Tab to the "Price Effect Date" column and enter the respective price effective date.
4. Tab to Quantity and enter potential case qty.
5. Click "SAVE".

CHANGES TO BID/QUOTE HEADER:

Adding Account Names – CLICK 'END USERS IN BQ' BUTTON ON THE TOOL BAR:

1. Type the end user name, then click the ADD button.

Adding Authorized Distributors – CLICK THE 'DISTR IN BQ' BUTTON:

1. Type the distributor or customer number code, then click the ADD button.

Note: We should only authorize distributors who have multiple locations (such as JanPak - Dallas, Ft. Worth, or Birmingham), or who are members within the same buying group (such as Unisource or Network).

HOW TO REQUOTE:

When using an already existing quote number for which you are updating with new contract dates and pricing, you can re-quote:

- Click Bid/Quote.
- Enter the bid or quote number in the appropriate box (remember to precede with 0's so that you enter a 7 digit number).
- Change the following information in the fields (boxes) listed below:
 1. B/Q = Q (all new entries are Quotes)
 2. STATUS = A
 3. BID OPENING DATE = current date
 4. BID ACCEPT DATE = this field should be blank so remove any information (this pertains to active bids only)
 5. EXPIRY DATE = this field should be blank so remove any information (this pertains to expired/deleted bids only)
 6. START PRICE G PERIOD = Contract Start Date
 7. END PRICE G PERIOD = Contract End date
 8. Proceed to "EDIT BID/QUOTE ITEMS" and enter item changes.
 9. Document and record actions in the **Internal Note** box and precede and end each note with an asterisk (*) i.e. *9/20/08 requote / LM*
 10. Click SAVE.

11. To remove or delete items, select the item, then click Delete.

BID/QUOTE SYSTEM REPORTS

Bid Accounts By Salesman

1. Populate any of the boxes to get desired results:
 - Salesman From and Salesman To
Example: Salesman 382 to Salesman 382 will show ALL bids/quotes for that salesman. To narrow it down to ACTIVE bids/quotes, enter an "A" in the Status box.
 - Distributor number
 - B/Q – enter B for bids only, Q for Quotes
 - Status – enter A for Active, or D for Deleted
 - Bid Class – enter NP for Net of Programs, OTH for Programs Paid
 - Bid Type – enter P for Public bids
 - Start Price G Period – enter specific start date i.e. 12/1/07
 - End Price G Period – enter specific end date i.e. 12/31/07
2. Select report format – PDF, Excel or XML
3. Click "GET REPORT"
A FILE DOWNLOAD box will appear. You must click "Open" or "Save".
Once opened, you may need to reset the margins or change its' orientation to Landscape vs. Portrait, etc.
4. When finished, Click "BACK TO MAIN".

ITEM TRACKING

1. On this report, you are required to provide Activity Start date and Activity End Date, and it only allows a max date range of 180 days (or 6 months). So if you want YTD activity, for example, you would have to run 2 reports - for period 1/1/07 to 6/30/07, and then run again for period 7/1/07 to current date.
2. You may then enter a Salesman From and Salesman To Range, i.e. 382 to 382.

3. Or you may enter a specific Bid Number, Distributor number or Distributor group, i.e. NET for Network (this would pull activity on all active Network national acct. bids).
4. Select Report Format – PDF, Excel or XML
5. Click GET REPORT

A FILE DOWNLOAD box will appear. You must click “Open” or “Save”.

Once opened, you may need to reset the margins or change its’ orientation to Landscape vs. Portrait, etc.

6. When finished, Click “BACK TO MAIN”.

OTHER AVAILABLE TOOLS

The following reports and tools must be requested through the Special Pricing Department in Monroe:

1. Customer Cancellation Letter – provides distributors with a list of bids that are being cancelled due to low usage.
2. Bid Award/Loss Report – provides sales reps with list of bid accounts awarded, as well as those which were not awarded.
3. National Account Bid Activity – provided quarterly to National Acct. team. For each active national account bid, it shows the list of distributors and items used.
4. National Account Bid Activity by End User Level – provides large buying groups with a list of end users sold against each national acct. bids, i.e. Premier Hospital Group, Med Assets and Amerinet.
5. Bid Sales vs. Overall Sales by Region – provided to the RSM’s on a quarterly basis. For each distributor, it shows total invoice sales (in dollars & case quantity), bid sales (in dollars and case quantity), and percent of bid sales to overall sales.
6. Exception Report (Items below Bid Floor Report) – this report is run by SPD in Monroe on a daily basis. By providing a bid floor level (i.e. D + \$.06/lb), the report shows all items on all bids or quotes that fall below the bid floor level. This provides SPD with a way to monitor pricing on a daily basis, and to ensure efficiency and accuracy.
7. Monthly Expiring Bid Reports – Provided to Sales Reps monthly a list of bids due to expire in 60 days. Because we have to provide the distributor with 30 days’ notice of any price change, we review the bids 60 days before expiration. For each sales rep, the report shows the bid number, account name, net of programs or programs paid, last POD date, and 6 month usage.
8. Automated Pricing Options:
 - By percent – will increase or decrease all items on bid by a certain percentage point.
 - By item category – will increase items by category by specified D+/- level.

NOTES: