CRUNCHTIME! ENTERPRISE MANAGER

Vendor Bids

Setup Guide

Document Details

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Overview

The following steps outline how to export out Bid Sheets for Vendors to allow for import of the initial Vendor Product information setup.

System Requirements

- CES Version 06.30.00 or higher
- Be sure to grab the latest version of this document here: https://links.crunchtime.com/EMSG-SetupVendorBids

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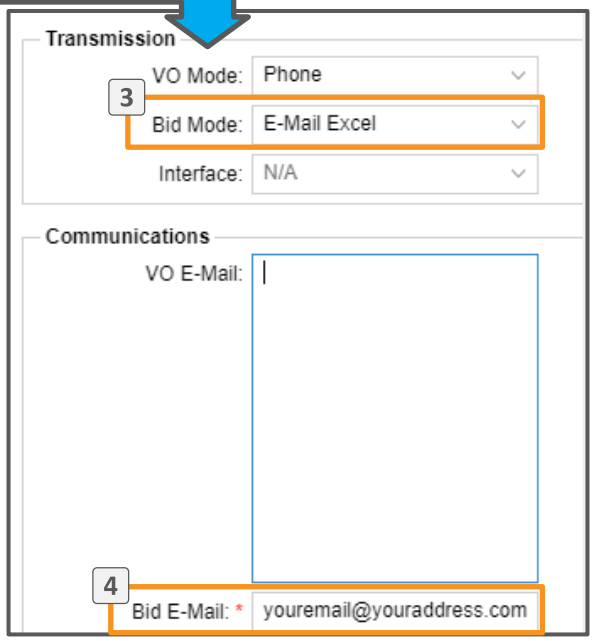
Where to Start: Vendor Setup

Enterprise Manager > Purchasing: Vendors > {Edit} > Vendor tab

During the initial data configuration, the first step in updating Vendor Bids is to set yourself up as the recipient of the Bid Sheet(s) for each Vendor. To do so, follow these steps:

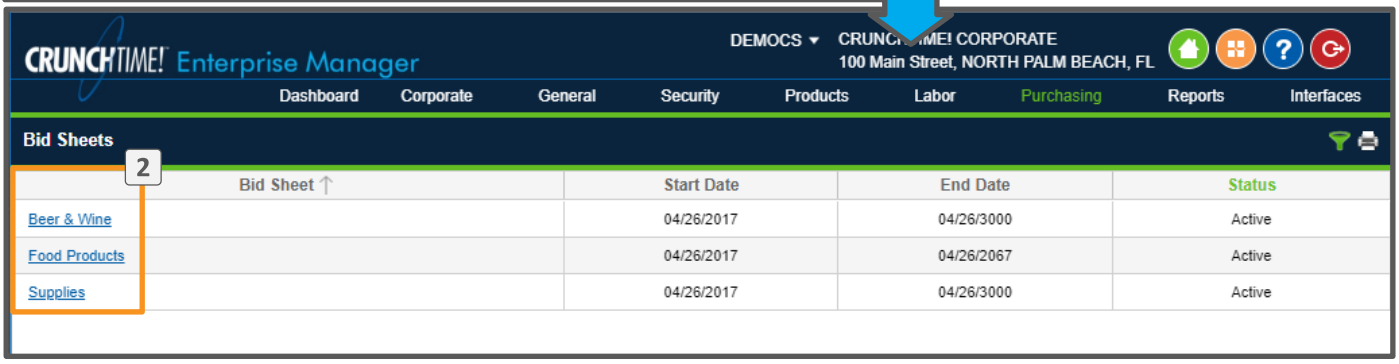
1. From the Purchasing menu, select *Vendors*.
2. To edit a Vendor record, click the *Name* hyperlink for the desired Vendor.
3. On the Vendor tab, set the *Bid Mode* to 'E-Mail Excel'.
4. Set the *Bid E-Mail* to your e-mail address.

After the Bid Mode and Bid E-Mail have been edited, navigate to the *Bid Sheet Usage and Submit* screen to send the Bid Sheet to yourself.



Exporting Bid Sheets

Enterprise Manager > Purchasing: Bid Sheet Usage and Submit



1. From the Purchasing menu, select *Bid Sheet Usage and Submit*.
2. Select the *Bid Sheet* link for the Bid Sheet to be e-mailed. This Bid Sheet will include a designated selection of products and is where you will enter prices for a specific Vendor.

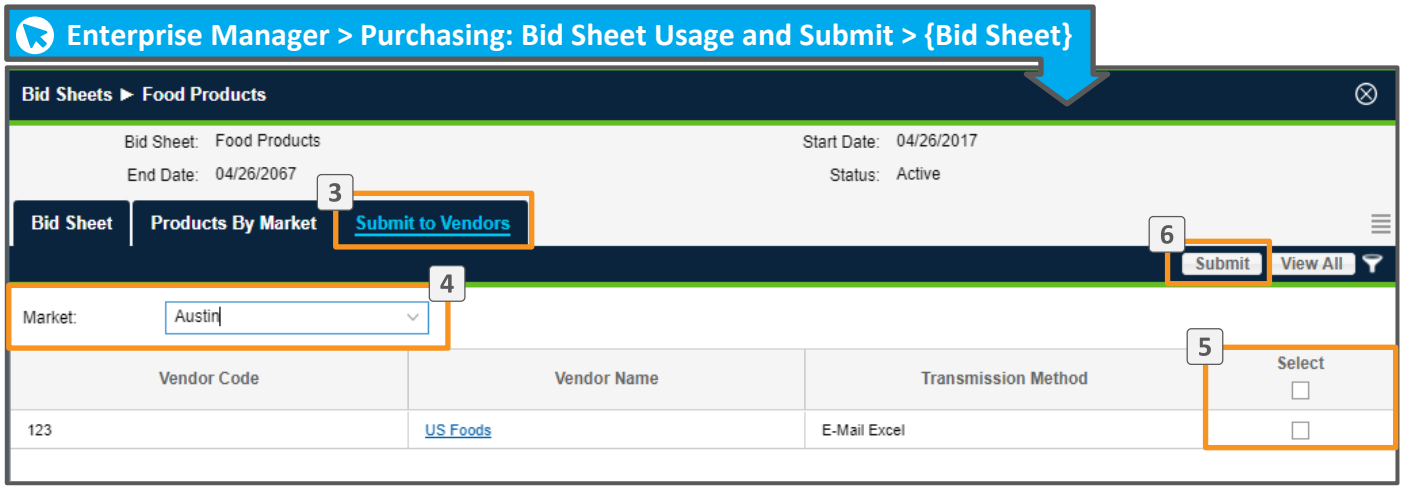
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Exporting Bid Sheets (Continued)



3 Select the *Submit to Vendors* Tab.

4 Select a *Market* from the drop-down.

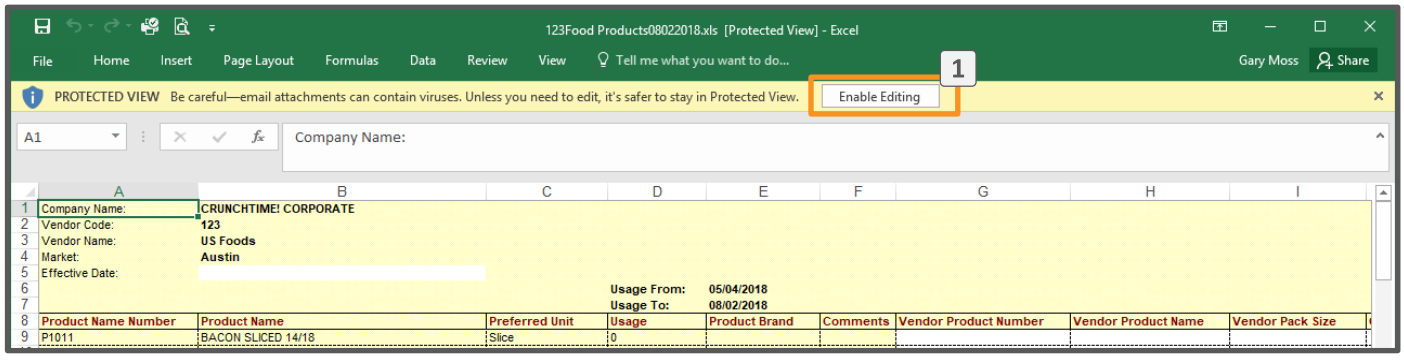
5 Select one or more *Vendor*(s) to receive a copy of the Bid Sheet.

6 Select *Submit*.

7. Retrieve the Bid Sheet from your e-mail.

Updating the Bid Sheet

You will need to edit a separate Bid Sheet for each Vendor in each Market. Within each file, the only cells to be edited are white. The rest are protected and in the required format ready for re-import.



1 After retrieving the Bid Sheet from your e-mail, open the file and be sure to select *Enable Editing*.

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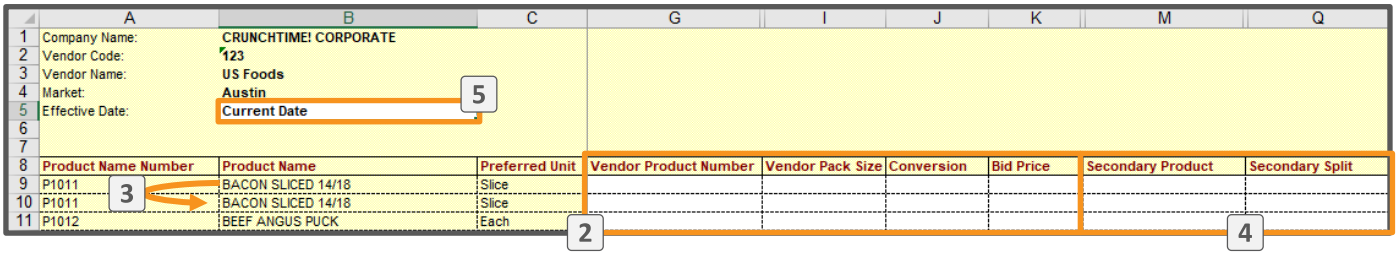
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Vendor Bids

Setup Guide (Continued)

Updating the Bid Sheet (Continued)

Retrieve a current Order Guide for the specific Vendor; this will contain the prices that they've provided for the given Market. Transfer that information into the CrunchTime Bid Sheet file as follows.



	A	B	C	G	I	J	K	M	Q
1	Company Name:	CRUNCHTIME! CORPORATE							
2	Vendor Code:	123							
3	Vendor Name:	US Foods							
4	Market:	Austin							
5	Effective Date:	Current Date							
6									
7									
8	Product Name Number	Product Name	Preferred Unit	Vendor Product Number	Vendor Pack Size	Conversion	Bid Price	Secondary Product	Secondary Split
9	P1011	BACON SLICED 14/18	Slice						
10	P1011	BACON SLICED 14/18	Slice						
11	P1012	BEEF ANGUS PUCK	Each						

2 Enter the *Vendor Product Number*, *Vendor Pack Size*, and *Bid Price* from the Vendor Order Guide. Enter the *Conversion* by associating the Vendor Pack Size to the Preferred Unit, also known as the Inventory Unit, listed on the Bid Sheet.

Tip: Vendor Units or Pack Sizes are often larger than the Inventory Unit for a Product. To make conversions easier, the question we ask ourselves is:

- "How many Inventory Units are in 1 Vendor Pack Size?"

Don't forget that the Bid Price is the price per Vendor Pack – the conversion above is used in calculating the price per Inventory Unit.

3 To add a split or substitute Vendor Product, insert a new row under the Product and copy the original Company Product information.

4 Enter a 'Y' for *Secondary Product* and/or *Secondary Split*. Products flagged as "Secondary" are able to be received on a Vendor Order via electronic invoice. Products flagged as "Split" are available for ordering as well.

5 Enter the *Effective Date* and save as a .xls file.

Tip: The Effective Date must be either the Current Date or a date in the future for when the bids will take effect.

Make sure you save the file as a .xls!

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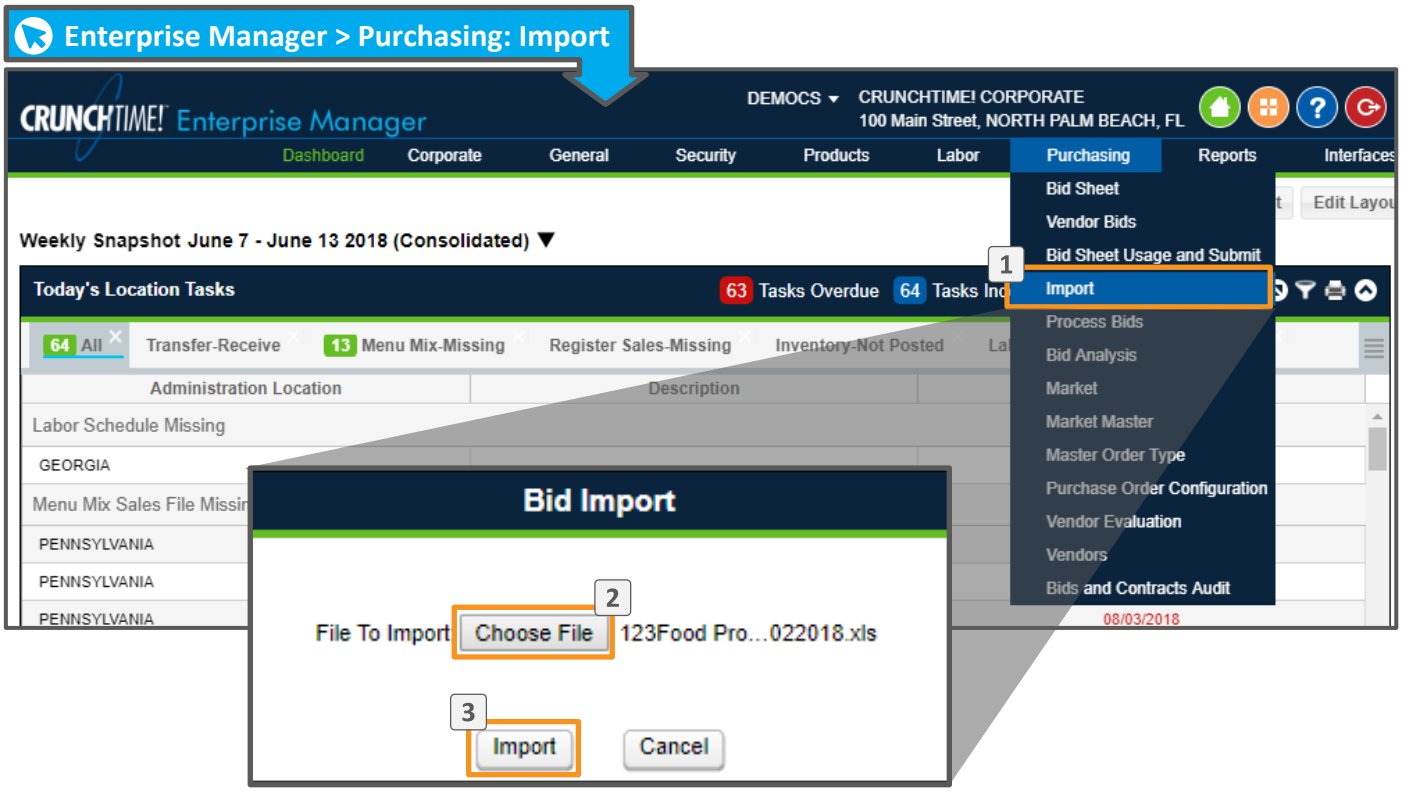
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Vendor Bids

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Importing the Bid Sheet

Once a Bid Sheet has been reviewed, follow the steps below to import it via Enterprise Manager.



1. From the Purchasing menu, select *Import*.
2. Choose the appropriate bid file.
3. Select *Import*.
4. The following screen will show that the file was successfully validated. Select *Import* to complete the process.



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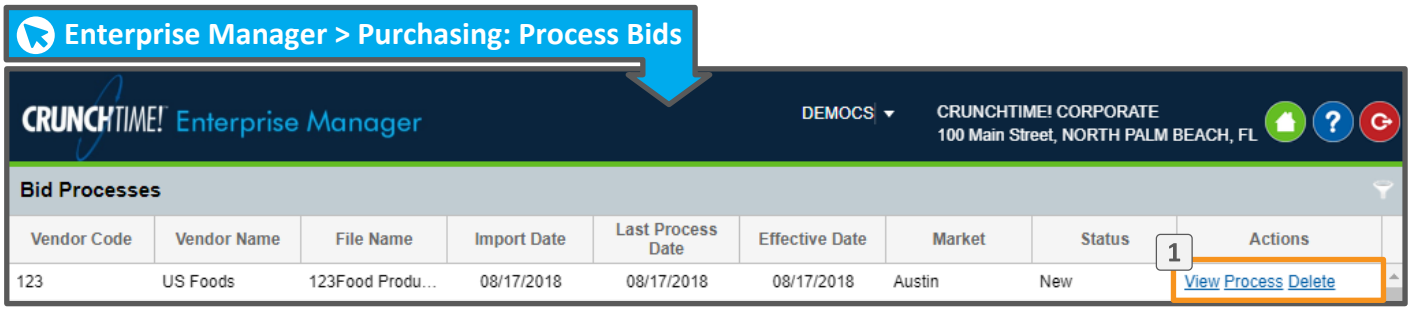
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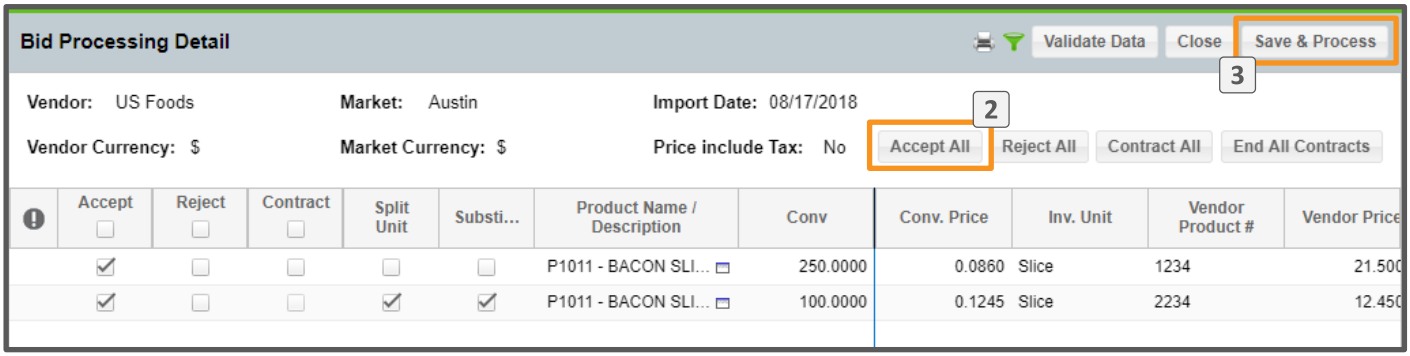
Setup Guide (Continued)

Processing the Bid Sheet

Now that the Import has been validated, we must review and process the contents of the Bid Sheet as well. The Project Team is typically responsible for the first set of Bids that are imported and processed. Given that our data is good, we should be able to Process, Accept All Bids and Save! In the future, Vendors will send over their order guides in this format for Import and Processing.



1 Select the *Process* link for the appropriate bid file.



2 Select *Accept All*.

3 Select *Save & Process*.

4 If you wish, you can save the prices on this Bid Sheet to multiple Markets. Select the Markets by clicking the appropriate check box.

5 Choose *Select* to save.



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