IntelliBid Version 9.1 RELEASE NOTES

The major enhancements to IntelliBid for 9.1 include:

➢ Reworked Job Register to reduce lag time and improve performance
➢ Improvements in the install and upgrade process that significantly reduce the time and space requirements to run these processes
➢ Filtering by Company Type in Companies/Contacts
➢ Insert Special Item dialog now has fields to capture Manufacturer and Catalog Number
➢ Maintenance screens allow Read-only access when one user has it locked
➢ Added more rate tiers to the Bond Calculator
➢ Update 3rd Column and Target pricing from EPIC simultaneously
➢ Vendor import mapping configuration screen updates
➢ Allow multiple users to access user-specific preference simultaneously
➢ Administrators can now log out users to free up licenses for others
➢ Material and Labor values in Item View report now shown as 4-place decimal
➢ Pre-upgrade DB Table/column integrity check
➢ Cost Code by Labor Class Report
➢ NetPricer results reporting on items that exceed normal limits
➢ Installation reports that subtotal the Phases
➢ Item Maintenance Cost Code report

Filtering by Company Type (96952)

A filter to list companies in the Company grid by Company type has been added to the Companies/Contacts tool bar. Selecting one of the Company Types will list those companies in the grid for easier selection.

Allow Read-only access when a user has a lock on a section (99756)

Currently, when a user is in a maintenance screen such as item maintenance, no other users can enter item maintenance. In multi-user environments, it improves efficiency for users if they are allowed to view the Maintenance screens while another user is updating.

Manufacturer and Catalog Number fields captured on Special Items Insert (97938)

The Special Items Insert dialog includes fields for Manufacturer and Catalog Number now.

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Bond Calculator (100593)

The Bond Calculator now has 2 more tiers for rates.

Ability to process Target pricing from EPIC simultaneously with 3rd Column Pricing (103662)

EPIC added an option to export Target pricing along with 3rd Column. The import has been modified to accept both pricing with one pass.

In the EPIC pricing software, Options - Update Manager... -> Properties, check the option to "Export Target". When this option is checked, EPIC's Target Pricing is included in the Trade.dat file. IntelliBid updates both prices.

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Vendor Mapping (105245)

Modifications to the Import Vendor Pricing dialog include the ability to re-select the 1st data record, consolidated the UPC fields and identified Catalog number as an optional field.

Recognize Metric indicators in Unit of Measure field (107729)

IntelliBid now recognizes unit of measure values of:

- m as 'per each' if the PS_DIV field = 3.2808
- m as 'per meter' and divide by 3.2808 if PS_DIV field is 0.00 or 1.00
- M as 'per 1000'
- km or KM as kilometer
- K as 'per 1000'

Allow multiple users to access User Preference Settings simultaneously (109738)

There was a restriction that prevented more than one user to access the User Preference Settings. This has been corrected and multiple users can now access and update their User preferences at the same time.

Gave the Administrator the ability to log out users (112728)

Many larger companies share licenses among Estimators. When a user forgets to log out, it is possible that all licenses could be in use preventing someone else to log in when they want to. An Administrator can now log out specific users in User Access > User Activity tab, freeing up the licenses for others to use.

Pre-upgrade Database Table Check (113159)

The Database Upgrade process now ignores any user added changes to the ConEst schema. Any additional tables created by the user will be retained. Any changes to columns, constraints, or tables within the ConEst schema will be replaced with the latest updates. This makes the upgrade process
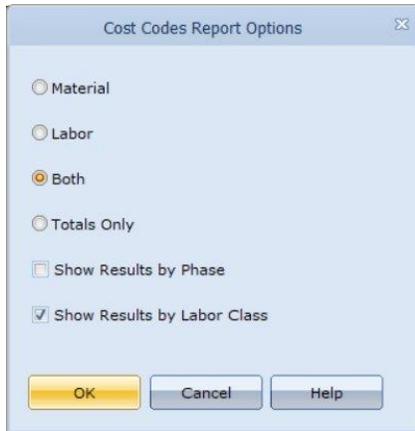
easier for customers who have added tables for their own use while maintaining the integrity of the ConEst schema.

Reporting

Cost Code by Labor Class Report (108523)

This is a modification to the options available for the Summary Cost Code reports. This report lists items by Labor Class: Electrical, Low Voltage, Machine Operator and any additional Labor Classes instead of phase.
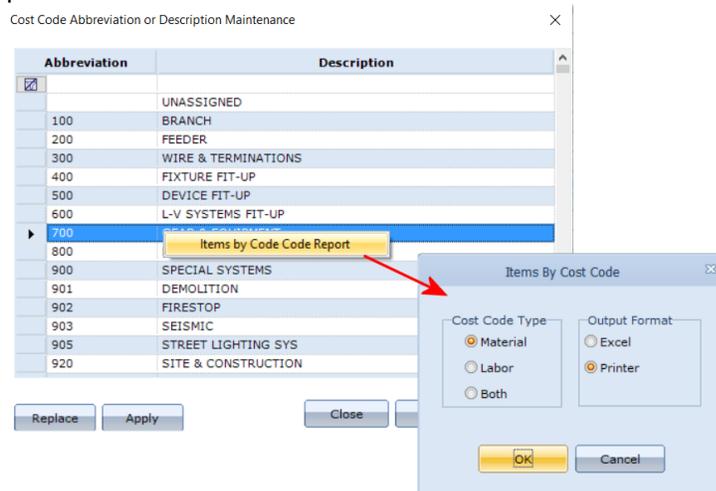

Flag NetPricer Pricing that exceeds limits (109381)

Unit Prices from NetPricer that are double or half the current price are not updated in IntelliBid and are listed in a report. This will help identify items with not standard Units of Measure. The Update reports in both Summary and Item Maintenance have been modified to report these items and the prices.

Item Maintenance Cost Code report (110883)

Cost Code maintenance has a 'replace' feature which allows the user to replace a specific cost code with another in the items database bug until now, there wasn't a report to show the items using that cost code. This report can now be triggered with a right-click on the cost code in Cost Code Maintenance. This opens an option dialog to select Cost Code Type and whether the output is to be formatted for the printer or Excel.

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Installation Report subtotaling each Phase (99688)

A new report has been added to show rollup by phase subtotaling each phase. The Bid Phase Total by Top Phase report is listed with the Custom reports on the Bid Recap Report Menu.

Bid Phase Totals

Vendor: TARGET			Labor Level: UNUSED 6				10 Oct 2019 15:29:31	
Tax Rate status: Default	Bid Name: POST BID BASE + DEMO						Bid Template: B-M TEMPLATE JUL 2010	
	Material $	Labor Hrs	Labor $	Quotes $	Equip. $	Sub-Con. $	Phase Total $	
LIGHTING FIXTURES	5,787.40	-	-	55,333.33	-	-	61,120.73	
LIGHTING FIXTURES > CANOPY	36.13	4.68	315.21	-	-	-	351.33	
LIGHTING FIXTURES > PART A	2,934.10	224.85	15,160.07	-	-	-	18,094.17	
LIGHTING FIXTURES > PART B	1,319.66	95.75	6,455.79	-	-	-	7,775.45	
Subtotal: LIGHTING FIXTURES	**10,077.29**	**325.27**	**21,931.07**	**55,333.33**	**-**	**-**	**87,341.69**	
LIGHTING CONTROL > CANOPY	138.97	12.48	841.40	-	-	-	980.36	
LIGHTING CONTROL > PART A	1,389.19	71.49	4,819.89	-	-	-	6,209.08	
LIGHTING CONTROL > PART B	829.40	37.07	2,499.12	-	-	-	3,328.52	
Subtotal: LIGHTING CONTROL	**2,357.56**	**121.03**	**8,160.41**	**-**	**-**	**-**	**10,517.96**	
LIGHTING BRANCH > PART A	19,832.59	177.48	11,966.31	-	-	-	31,798.89	
LIGHTING BRANCH > PART B	4,374.88	62.96	4,245.04	-	-	-	8,619.92	
Subtotal: LIGHTING BRANCH	**24,207.47**	**240.44**	**16,211.34**	**-**	**-**	**-**	**40,418.81**	
POWER DEVICES > ROOF	581.46	23.23	1,566.09	-	-	-	2,147.55	
POWER DEVICES > PART A	8,752.40	193.86	13,070.60	-	-	-	21,823.00	
POWER DEVICES > PART B	4,673.41	115.57	7,792.21	-	-	-	12,465.62	
Subtotal: POWER DEVICES	**14,007.27**	**332.66**	**22,428.90**	**-**	**-**	**-**	**36,436.17**	

Material and Labor values in Item Vue report shown as 4-place decimal (113030)

The values for material and labor values in Item Vue display as 4-place decimals. The report was rounding to 2-place. The report now includes 4-place decimal numbers.

Fixes

- The discrepancy with the Bid Total in Phase Breakdown when the Loss Labor Calculator is used has been fixed. (103395)
- Quote unit pricing on Proposals now displayed to match the Quote values as shown on the Quote tabs. (109627)
- Ordering of Categories in the Item Database has been fixed so it is working properly. (109871)
- The version numbering of the IntelliBid database and JobTrac have been changed to coincide with the IntelliBid version number. For this version, IntelliBid, JobTrac and the ConEst database all have the version 9.1.9 (108095)
- Issues with JobTrac Actual hours doubling addressed in Labor Resources, Job Cost and the Time Card report. (117238)