



Bidding

Bidding is a complete, project-based bidding (quoting) and budgeting system used by sales and production planning personnel to assemble any number of bids/budgets for a project/production. During execution, actual quantities/costs for services provided can be loaded directly into the original bid to compare with projected quantities/costs. A variety of standard reports are also available to compare actual work performed versus quoted work.

The Bidding program is an optional addition to the Workflow Management Core System.

BENEFITS

- ▶ Easy-to-learn system with an intuitive user interface supports project bidding/quoting and production budgeting for external or internal clients.
- ▶ Automatically generate work orders after bid/budget approval.
- ▶ Manage customer-specific “contract” pricing by means of deal memos.
- ▶ Customize bid presentation and layout to meet corporate standards.

- ▶ Provides full audit trail of bid/budget versions.
- ▶ Quickly compare actual work versus budgeted work via “bid versus actual” functionality.
- ▶ Generate complex bids easily using bid templates.
- ▶ Track project/production scope changes using change memos.

Equally Suited to Bidding/Quoting or Budgeting

The Bidding option can be used to prepare quotations to customers (internal or external) for work to be performed, for example, to provide a customer with a bid for postproduction services on a sitcom. Additionally, the Bidding option can be used for budgeting for technical and other services for a production (e.g., a television series).

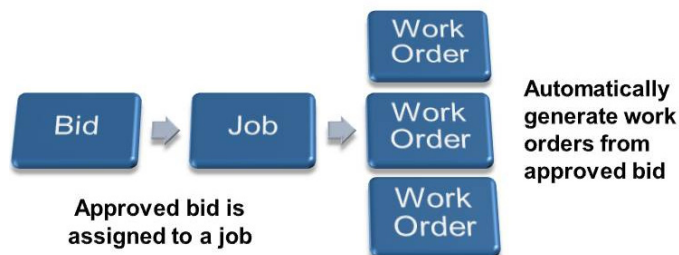


Create an unlimited number of bids

Final approved bid is assigned to a job

A full historical audit trail is maintained by tracking all of the versions of a bid/budget until the services and project scope have been finally agreed upon. Once a bid/budget is agreed upon, it can be locked down (approved) and the rates established in the bid will now apply to orders as work is done. Used in this way, the Bidding option helps management and operational personnel have better visibility on project status, track expenses better, avoid cost/budget overruns, and improve billing accuracy.

An unlimited number of bids/budgets for customers, jobs, and productions may be created, each with specific expiration dates.



Automatically Generate Work Orders

Once a bid has been approved, multiple work orders can be auto generated from primary sections of the bid or a single work order can be created that encompasses the entire bid. This process saves time and money and helps eliminate errors in transitioning a project from an approved, pending status into operational use.

Schedulers can then assign the appropriate services, personnel, facilities, and equipment to the work orders.

Comparing a Bid to Actual Work Performed Helps Manage Projects More Effectively

More accurate management and communication as projects, both internal and customer driven, move through their life cycles is achieved using the “bid versus actuals” functionality, which allows the original bid line items to be compared to the actual work performed. Comparisons can be made using a variety of parameters, such as, work completed, work in process, and work scheduled.

By loading actual work completed into the originating bid record, you can quickly compare variances by both unit/quantity for each line item. Work order items that are not on the original bid will be visible also, allowing for future improvements in bid accuracy or increasing current project billing.

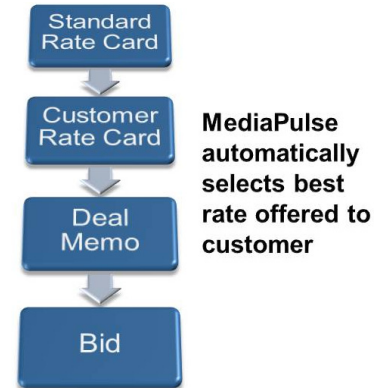
The Bidding option supports a number of reports that provide detailed printouts of bid versus actual information, as well as onscreen displays that support robust column sorting, filtering, and other functions to make getting to the data you need, fast and easy.

Deal Memos Can Span Multiple Projects

A standard bid only applies to a single job whereas a deal memo is a bid that allows sales personnel to make special pricing arrangements with a customer that may cover several different jobs.

Rates and discounts stated in an approved deal memo will override rates and discounts set by a bid for a single job, customer-specific rate card, and standard rate card. Deal memo rates can be set to expire, after which normal billing rates for that customer will apply.

For example, the sales department might make a deal with a customer to handle all special effects work for a television series season at a special rate. All other rates and discounts will remain the same (per standard rates or as per a customer-specific rate card), but all special effects work for the duration of the season will be billed at the special rates that the sales department negotiated in the deal memo.



Bid Templates Make Creating New Bids Easy

Bid templates allow the creation of highly complex, professional-looking bids quickly and with minimal effort. Facilities typically offer a range of services, and bid templates allow them to create detailed lists of each of these services. These templates can be created manually or created from existing bids. They can comprise detailed descriptions of each service, billing codes, quantities, and summary headers (or portions of bids). Unlimited quantities of bid templates may be created and stored, and multiple templates can be combined to create a single bid.

Change Memos Support Project Scope Changes

Managing detailed changes in project scope and ensuring that customers are billed accurately is made simple using the Change Memo functionality. Change Memo bids are created where changes in scope occur. All bid and/or budgeting information are maintained under a single job; this makes reporting more efficient and easier to handle.

Required **MediaPulse** Modules Workflow Management Core System

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