

CREATING A TENDER FINALISATION SHEET IN EXCEL

Title	Creating a tender finalisation sheet in Excel
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Creating a tender finalisation sheet in Excel

Most estimators design their own Tender finalisation analysis to suit their particular requirements. This analysis typically incorporates various ratios providing quick checks which can be used to fine tune the tender submission. New ideas would be regularly incorporated into the finalisation sheet. To provide the flexibility required we recommend that the estimators design their finalisation sheets in a spreadsheet program such as Excel.

Candy provides a facility to export data to Excel which can be used in the tender finalisation sheet, this facility saves re-entering the information manually in Excel.

Download the finalisation data to Excel.

- From the main menu select Candy System -> Estimating -> Finalisation -> Tender summary menu -> Finalisation data to Excel.

Excel will open automatically and download the information

- Using the Vlookup facility in Excel, referencing the names in column A, the values in column B can be transferred to a new position in the finalisation sheet.

Please refer to the Excel help for more information on the Vlookup facility. CCS has developed a naming convention to identify the information.

Below is an extract from an Excel download

JOB_CODE	!29763
JOB_DESC	888 Vent Shaft Demo Job 04-07-02 Progressed
FILE_DATE	Friday, 02 April 2004
FILE_TIME	15:55:01
AMT_NET_TOTAL	1,084,925.97
AMT_GRS_TOTAL	1,171,491.24
AMT_SEL_TOTAL	1,536,139.64
AMT_PLG_TOTAL	0.00
AMT_NET_F_M	27,291.60
AMT_NET_F_S	2,123.07
AMT_NET_M_M	10,532.00
AMT_NET_mL_M	11,611.50
RES RTE 2211	35.00
RES_QTY 2211	5,134.60

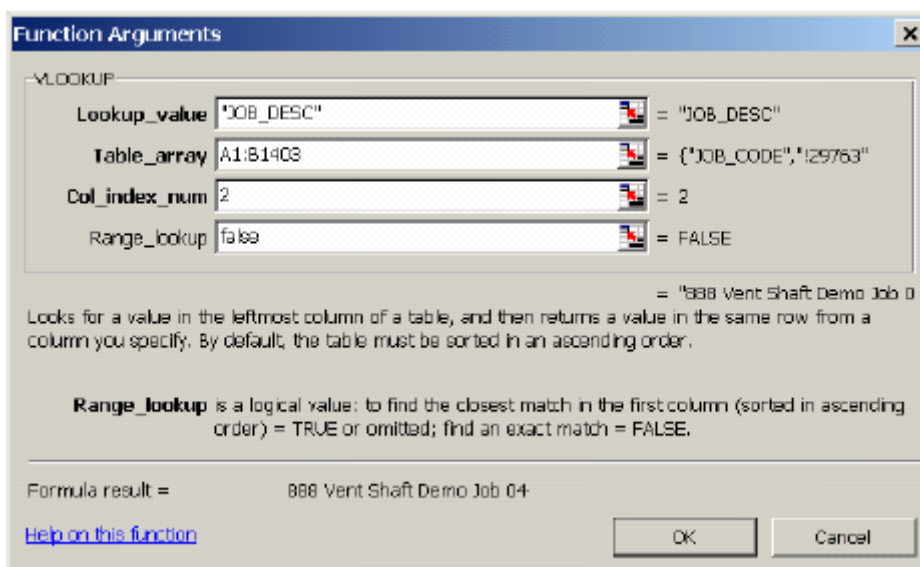
The naming convention is:

Job_DESC - Candy Job's description
 AMT_NET_TOTAL - Amount Nett Total for the job
 AMT_SEL_TOTAL - Amount Selling Total for the job
 AMT_NET_F_M - Amount Nett Trade Resource type

eg. Nett Amount for the Formwork(F) trade Material(M)
 resource type

AMT_NET_mL_M - Amount Nett Trade Resource type

Eg. Nett Amount for the metalwork trade(m) Material(M)
 resource type



- Using the Excel Function wizard create the following Vlookup to find the job name in the table and place the name in the relevant cell in Excel.

Please specify a large Table_array as in time the download to Excel data file will increase in size.

The onus is on the user to investigate the functionality and limitations of the Vlookup formulae in Excel.

Be aware that certain sort criteria need to be applied before using the Excel Vlookup formula. Refer to the Excel help for more information.

Disclaimer: The User must check the data is correct in Excel and balances back to the CCS Data. CCS cannot guarantee the data in Excel is correct.

All Excel related questions should be directed to your IT department or your Microsoft Excel supplier. CCS will not supply support on Excel related queries.