User Guide 2017

All Versions

See website for version features comparison. Enterprise users see also:
Enterprise Setup Guide & Enterprise Setup Workbook.

Website: www.bidmagic.com

Email support: support@bidmagic.com

Support forum: http://forum.bidmagic.com

Phone support: (805) 309-0100 x 2

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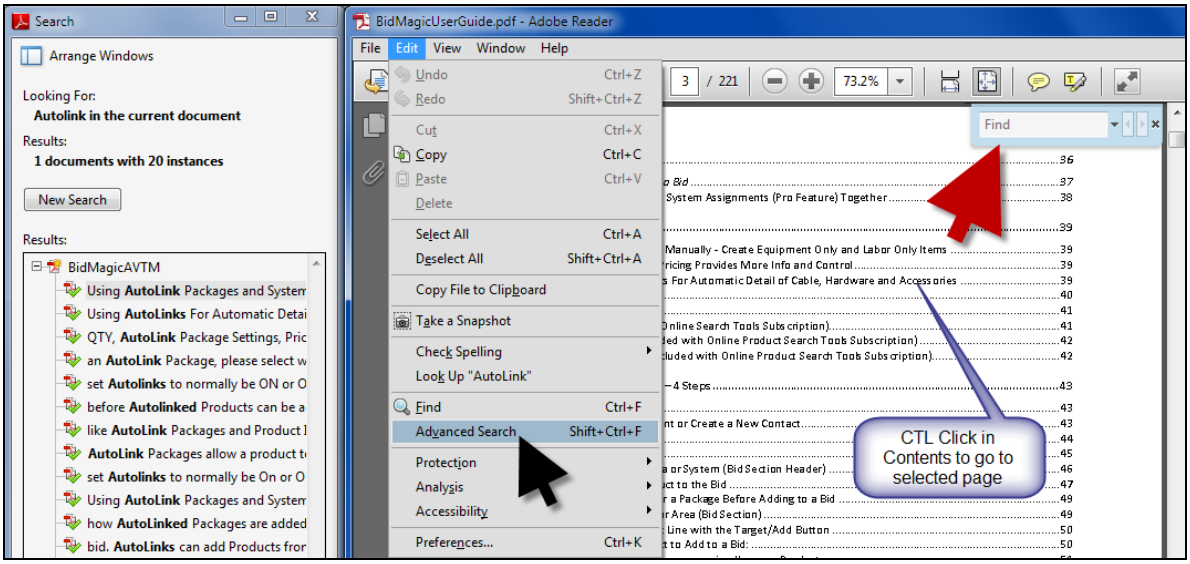

Requires activation for use and annual renewal of Software Assurance.

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August 16, 2017 Revision 8.9.0.0

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NEW IN THIS VERSION: 8.8

ALL VERSIONS:
View Menu option to show/hide line item prices and price summary.
Add items much faster with new Floating Product Search Window (Great for 2 monitors!)
Power Search Filter added to Bid page.
Touchscreen operations made simpler and more powerful.
Improved Dashboard filters with date range.
Select items and quantities in a package before adding to a bid.
Copy a package to multiple products at once.
De-Activate Multiple Bids with a single click.
Discount can be entered as a percentage of the Bid.
Direct entry of Notes on Contact Screen helps manage job progress
Activating Price Level automatically updates all items in Bid that have price level active.
Choice to show or hide prices of $0.00 in Client Proposal.
Improved QuickBooks Desktop Interface.
Ability to send selected products to QuickBooks.
Optional QuickBooks Online Interface.
Compatible with Windows 10, Office 365, Office 2016 and Visio 2016.
Print Package labels for assigning products to a job.
Automailer Settings moved to Default Settings
Surtax rate and limit settings

PRO & ENTERPRISE
Detailed Payment Plan for each Bid (up to 6 payments)
Set a Labor Difficulty factor for a Bid and specify which labor phase hours to adjust.
Display the Total of all Optional Items in the Bid.
Limited User can create and edit Service Tickets.

ENTERPRISE
Large database search option for users with over 25,000 products.
Note: Over 25,000 products may result in slow response in Std and Pro versions.
Enterprise adds High speed search with additive filters instead of subtractive filters.
Job Status history is logged in Bid Settings.
Email Job Status updates can include Client email.

TECH CALENDAR – NEW UPDATE WITH IPHONE & ANDROID APP!
Works with NEW iPhone and Android apps.
Automatic text messages to notify client of scheduled appointments.
Click Directly on Calendar to create a QuickTask for installation, service or more.
(No need to create a Bid or Service ticket first!)
Timesheets can be sent to QuickBooks. (optional)
Instantly see who is clocked in. Calendar Highlights techs who are clocked in.
Send Job to Calendar allows choice for updating existing projects or overwriting them.
Installation Hours can be manually adjusted when sending to Calendar.
Field Notes from Mobile Devices enhanced to allow sending up to 500 characters.
Service Tickets are highlighted in green in unassigned task list.
Work Order screen shows total hours for selection of Projects, Techs or Filtered selections.
Improved date navigation for Work Orders and Timeline including Zoom in and Out.
New work orders default maximum time assigned to 8 hours per day, but can be adjusted to more.

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Allow rescheduled tasks and projects to be deleted.
Automatically assign 1 hour of labor to a work order or service ticket if labor not defined.
Projects can be made inactive on Gantt Chart.

iPhone/Android Apps Adds the Following New Features:
Easily Track Lunch, Break, Meetings and other daily Activities.
Mobile Users can create a New QuickTask that is sent to work orders.
Active link to call Jobsite phone.
Allow multiple Clock in and out entries to Travel or Job and send all to Timesheet
Maps & Directions with turn by turn navigation.
Real Time Clock in and Out with GPS verification.
Signature and photo capture from phones.
Phones can see files attached to projects.

Note: Coming Features and delivery date subject to change.
Windows XP and Office 2003 are no longer supported.

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INSTALLATION QUICKSTART - STEPS TO INSTALL & DEPLOY

BidMagic software is the easiest to setup and deploy. However, you will need to set aside some time to install, learn and setup your software. Here is a list of seven steps to a successful deployment.

1. You must have admin rights to your PC to install this program.
2. Please run all Windows Updates before beginning. Connect to the internet before installing and close all running applications. BidMagic installs SQL Server Express on your PC. During the installation, click Next when prompted. Installation will take about 20 minutes and may require a PC restart.
3. Click Register and fill in your contact info to activate your PC and turn on features you have ordered.
4. Watch the Video Tutorials in the order provided and print the User Guide.
5. Use the sample products and proposals provided to create test bids and learn the workflow.
6. Import your products into BidMagic using Excel spreadsheets, QuickBooks and/or the Online Product Grabbers. We recommend importing only products you intend to sell.
7. Import Contacts from Outlook (Pro/Enterprise) and/or QuickBooks (optional).
8. Please review Product & Product Strategies at the beginning of the User Guide to plan your deployment. Take time to review your products, build packages and setup the labor values.
9. Once your product data is ready you are ready to go begin writing live bids. Multiusers can connect any additional users to the master database and assign rights for users.
10. Note: You will need MS Word and Excel 2007 or newer or Office 365 to print Reports.

REQUIREMENTS

Windows 7, 8 or 10 with 4 Gig ram minimum. Windows XP is not supported. Word 2007-2016 for printing reports and for customizing report templates. Excel 2007-2016 to view/print Excel reports. Office 365 is also supported. Internet connection for upgrades. Adobe Reader or equivalent to view or print User Guide. Includes SQL Server Express for up to 10 concurrent users. Larger installations require SQL Server full version. (purchased separately) One license is required for each PC where BidMagic is installed. Server installations require on license for each user. QuickBooks Interface requires: QuickBooks Pro, Pro Plus, Contractor, Enterprise. US versions 2010 or newer. Visio Interface requires Visio 2007 - 2016. 64 bit versions of Microsoft Office are not recommended or supported. Screen resolution must be at least 1024x768.

BidMagic automatically checks online for the latest version when you open it, so be sure to connect to the internet regularly to stay up to date! Be sure your security and firewall settings allow this connection. Norton Antivirus software can cause problems with BidMagic.

Windows can block auto updates. Make sure you can receive them. Right Click on the BidMagic folder then select properties. Go to the security tab. Edit. Add. Advanced. Click Find now, then scroll down to the active user that will be performing the update. Click OK twice to return to permissions and grant full control. This will allow full access to BidMagic & All sub-directories. If you have difficulties installing, please contact tech support. We do not recommend uninstalling and reinstalling the software, as this causes problems.

Multiuser Installations

If you have purchased multiple seats of BidMagic, you can connect users together. Install BidMagic on the master PC. Register that PC. There is no need to install the software on additional PC's. Refer to the Multiuser Installation Instructions found later in this guide to create a simple desktop shortcut that can provide access for additional users. Additional options are available for connecting with terminal services, VPN's, remote desktop and more.

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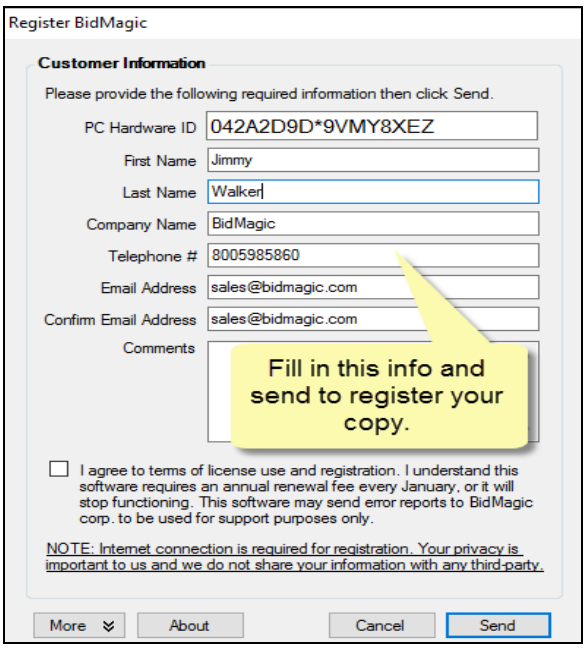
Disclaimer: BidMagic accepts no responsibility for client network and security setup choices. Adjusting security settings can make computers more vulnerable to security breaches. We recommend that you utilize the services of an IT professional to setup firewalls, security settings, passwords and other technical requirements. Make these adjustments at your own risk.

REGISTERING/ACTIVATING YOUR SOFTWARE

BidMagic is a fully operational program that requires activation before use. The first time you run BidMagic you must enter your contact information to activate BidMagic for your PC. Then Click: 'I agree to terms of registration' and 'Complete Registration' to send this request to BidMagic's registration team.



This registration will allow us to generate an activation key for your computer. If your system cannot connect to email, please copy and paste the PC Hardware ID into an email and send it to register@bidmagic.com Our registration team will activate your PC via the web. (usually in 1 business day or less) You will receive an email confirming that you have successfully registered. From time to time, your PC will check to verify your registration. If prompted, please connect to the web to allow your registration to be reconfirmed.

Each registration activates your software for use on that specific computer. If you have multiple computers running this software, each one will need the PC Hardware ID to register.

The Software Assurance program must be renewed each calendar year. Your software will remind you when it is time to renew this Software Assurance every January. You will receive a notice asking you to renew your registration at that time. BidMagic may send error reports without any personal information to be used by our support department only.

If you need to have several computers writing proposals, purchase a copy for each PC where the software is installed. We can setup a multi-user network with the latest in network and mobile technology. If you need to move your software to another computer, please contact us.

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WATCH THE VIDEO TUTORIALS!

After you launch BidMagic, you will see the Welcome screen. Please begin by viewing the video tutorials. They are titled: Tour, Getting Started, The Products Table, Creating Proposals and Tips & Features. These will train you on using the software. We have added new features since creating these tutorials, so please print out the user guide found under USER GUIDE.

You will need a web connection and headphones or speakers to run the tutorials.

We recommend watching the tutorials in **full screen mode**. When you move your mouse pointer to the top of the screen, the transport controls appear allowing you to control the presentation. You can hit ESCAPE at any time to return to standard viewing mode. Plan to spend time to learn the software and to load your products and company choices to get off to a great start!

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PRODUCT & PRICING STRATEGIES - SETUP

BidMagic is fast and easy to use, but it is also powerful and flexible. Setting up your Products is a very important step to getting started. We have included 3 sample Bids to illustrate Automatic Labor Calculations, Manual Labor Entry and Service Calls. (Service calls are a Pro/Enterprise feature.) Turn Labor AutoCalcs OFF to override calculations by hours when needed. Here are 3 strategies to match the needs of your company as you begin:

Beginning User - Enter Labor Manually - Create Equipment Only and Labor Only Items
When you first begin, if you have not yet added labor to each product, you can directly enter total job labor in the Installation Adjust +/- yellow box in the Bid Summary section. To override any existing labor, set AutoCalcs to Off in the Bid Summary section. You can also create individual labor line items, such as Installation Labor or Prewire Labor. With this method, you can add 42 hours of Installation labor by adding 42 of those labor items in any room or section of the proposal. Create the Product with Equipment sell price = $0.00. Click the Labor Tab to set labor values (ie. Installation Labor = $100.00) Note: Click Hide on Labor only items in a Bid and the customer will not see those line items.

This method is suggested just for initial startup and will not deliver the real power of BidMagic. Enter more product and pricing detail to achieve the best results.

Note: Equipment totals appear by default on BidMagic line items in Client Bids unless you set Equipment Sell Price = $0.00 and in Print Preferences check the option to Show Labor if Equip = $0.00. Client copies will then show labor amounts on line items instead of the equipment sell price.

Standard User - Labor Hour Pricing Provides Better Pricing and Control
When creating a product, enter a fixed amount for cable/hardware, programming - but for installation charges set the hours used for each labor phase in PreWireHR, TrimHR and FinishHR. The amount you charge for each labor phase is set in your Default & Bid Preferences. Leave the Installation (flat rate) = $0.00. With this method, whenever you update your labor rates, it will automatically update the labor charges for each product. This also allows job reports to print the summary of hours sold for each labor phase of the job. Set Labor AutoCalcs to ON when you want to automatically calculate labor based on the labor Phase hours included in your products.

The cable/hardware entry can contain a fixed amount you charge for wire, trim rings, connectors, etc. It can also include the charges for accessories like interconnects or similar items that you stock all the time. This method does not give you a breakdown of the included accessories. Just pull these non-inventory products from your truck and keep it simple.

Power User – Using AutoLinks For Automatic Detail of Cable, Hardware and Accessories
Setup your labor hours in the PrewireHR, TrimHR and FinishHR columns. Pro and Enterprise users can create additional labor phases. Assign a single equipment phase to all equipment for ordering. Create hardware and accessories as separate model numbers. Assign cable, hardware or other accessories in AutoLinks so they can be automatically added when needed. For example: each speaker autolinks to 50 Qty of a model number 16/4 cable at $0.20 per foot equipment and $0.01 per foot prewire labor. (= pull 100’ per hour) All items will be detailed in the client proposal and installation copies. Purchase Orders can then calculate 1,850’ of wire sold will order 4 – 500’ boxes.

This method gives full detail breakdowns including cable types and lengths for you and the client. The linked items can easily be edited deleted if not needed at this time. Click ‘Hide’ on unimportant parts to assign them to Cable/Hardware which keeps the client’s copy very clear and understandable.

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REACHING TECHNICAL SUPPORT

Click Help/ Create a Support Ticket in BidMagic to submit a Tech Support Ticket. Our support team will respond to assist you by phone or email. You can also email support@bidmagic.com or search our User Forum at http://forum.bidmagic.com/ Tech support does not provide training. Refer to this guide, watch the video tutorials or register for a live webinar at www.bidmagic.com

Error Reporting System

BidMagic includes an error reporting system that prompts users to send details of any errors the software encounters. If the error reporting screen occurs, please include the steps that led to the error and your name. This helps us resolve problems but does not generate a support ticket or a call back to you. If you need assistance, please contact support.

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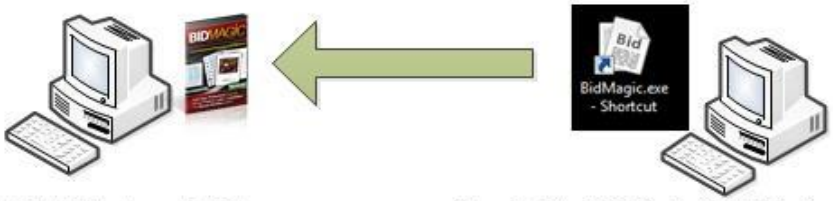
Two Ways to Setup a BidMagic Multi-User Installation

Install BidMagic on a single PC. Connect via a simple Desktop Shortcut - Best!

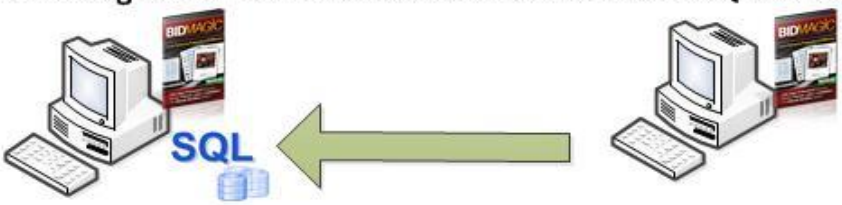


Step 1. Install BidMagic and SQL on a Master PC or Server.
Set Security to allow sharing the BidMagic folder. Very easy to maintain BidMagic and updates on a single PC.

Step 2. Do **NOT** install BidMagic on another PC!
Just create a desktop Shortcut
on another PC that points to BidMagic.exe
on the Master PC.
Very easy to add or move seats.
No need to update new releases.

-OR-

Install BidMagic on all PC's then connect to the shared SQL Database



Step 1. Install BidMagic and SQL Database on Master PC or Server.

Step 2. Install BidMagic on another PC. In Settings Menu/Database Connection point to shared SQL database. All PC's must run same version of BidMagic. All PC's require updates and require more work to add/move seats.

Sharing Templates, Job Folders and PO Folders with a network drive

Default settings: Set Paths for Templates, Job Folders and PO folders to a shared network drive.
Example: \Z:SharedFolder

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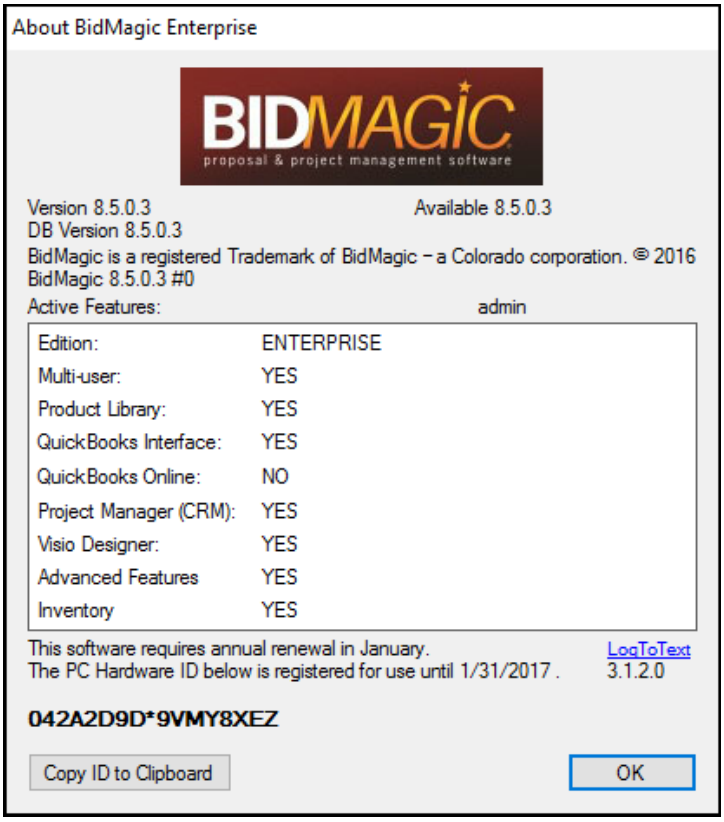
HELP/ABOUT - VIEW YOUR ACTIVE FEATURES

BidMagic comes with a number of options that can be turned on or off when activated. Click Help/About to view your current active features. You can also view the date that your registration expires and your PC Hardware ID that is needed for activation of features. If you ordered optional features, you may need to register to activate them. The copy ID to Clipboard makes it easy to email this number to support if needed.



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FEATURES COMPARISON BY VERSION

BidMagic has created software versions for installation companies of all sizes. You will find references to features for Standard, Pro and Enterprise versions in this user guide. The new sales Contact manager functions work with all versions, but Pro or Enterprise is required to connect the Contact manager with Outlook. As your company needs grow, BidMagic can grow with you, adding multiple users, management oversight, inventory control scheduling and more. Our Calendar system provides scheduling, mobile work orders, project management and more. The chart below compares the main features available in BidMagic versions. Please contact sales for assistance if you have questions or want to consider upgrading. If you have over 25,000 products in your database, you need the Enterprise version.

Standard Version includes all Core Features

BIDMAGIC FEATURES	STANDARD	PRO	ENTERPRISE
MultiUser Features & Permissions		✔	Advanced
Organize by Room & Systems (2 levels)		✔	✔
Price Level Adjustments & Optional Items		✔	✔
Room Descriptions/Scope of Work		✔	✔
Proposal Templates	5	10	10
Labor Phases	3	8	8
Choice of 3 Cover Pages		✔	✔
Contact Manager w/ Outlook connection		✔	✔
Sales Pipeline Tracking and Monthly Graphs		✔	✔
Central Purchasing Screen			✔
User Assignable PO's & Job Numbers			✔
Asset Tracking (20 fields per product)			✔
Multiple Locations/Departments/Inventories			✔
Job Status Tracking w/ email Notifications			✔
Management Reports from User Logs			✔
Inventory Control and Reports		option	✔
Project Calendar		option	option
QuickBooks Interface	option	option	option
Visio Interface	option	option	option
Product Library/MEGA SPECS & Web Grabber	option	option	option

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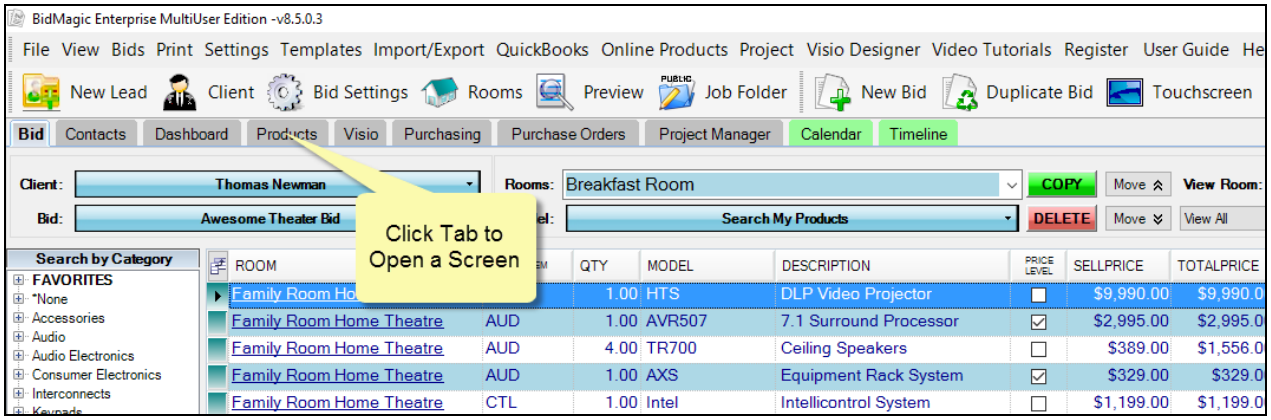
BIDMAGIC SCREEN TABS

NAVIGATING WITH SCREEN TABS

Instant access to the most used features is found with the tabs just under the Menus and Icons.
Bid: Where you create and edit bids.
Contacts: Where you manage lead contacts before creating Bids.
Dashboard: Search for Clients and Bids, Jobs, Service Calls. Add notes and Navigate to them.
Products: Manage your Products, Prices and Labor
Project Manager: Create Purchase Orders, Track Labor Progress, Inventory and Serial Numbers.

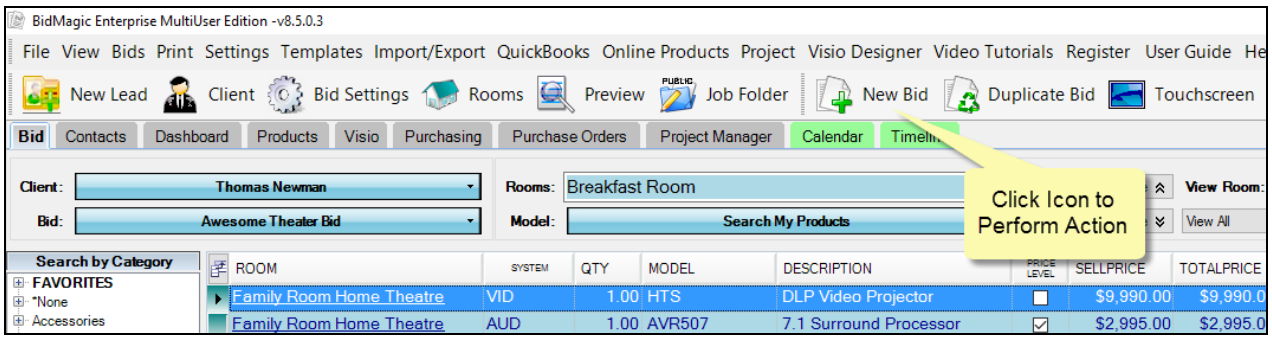
Optional Screens:
Visio Designer: Add Floor plans, Elevations, Rack Drawings and Wire Diagrams to your proposals.
Calendar: Plan and schedule your Installation and Service Techs on our Group Calendar
Timeline: Gantt Charts Track Job Progress, Work Orders, Hours and Completed Tasks.



Before writing proposals, set up your default settings. If you are a multiuser, you will need to be an administrator to open this screen. Setup your standard hourly rates for Prewire, Trim and Finish labor. Entering Labor cost is used for accurately determining profits. Also set your default Design/Management rate and Sales tax choices. Sales tax is generally charged on the sale of tangible goods. In some states taxes are charged on installation, construction and repair services. Other states charge Use tax (based on cost) for Products that become part Entering and Changing Data in BidMagic. We have added Surtax with controls of rate and limit.

ICON SHORTCUTS

BidMagic includes Icon Shortcuts for navigation. The Icons change based on the current screen.



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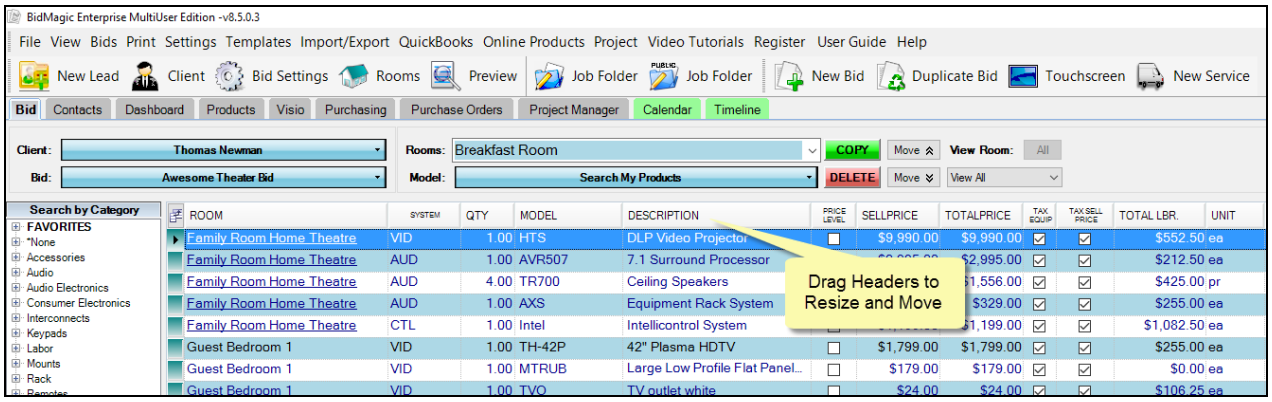
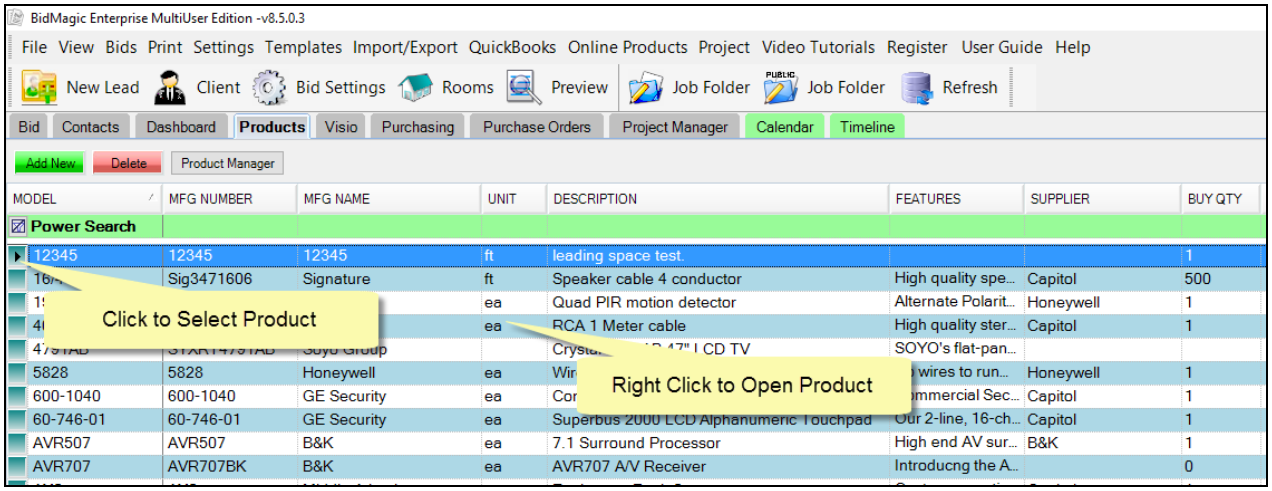
Customizing Column Size and Order

In BidMagic Bid Screen and Product Table, you can drag the column width to suite your preferences. In the Bid Screen you can select additional data columns that you wish to display. Product Table, you can also customize the order of columns easily by selecting the column and dragging it to a new location. These changes will be stored.





POWER SEARCH FILTERS

Our new power search filters provide instant results while you type. This tool will really speed up your interaction with BidMagic. Look for the green top row on most of our screens. You can type a search value in one or more columns in this green row to provide super fast filtering of the choices. Checkbox columns can be filtered by typing True (T) of False (F) to make a selection. While in this filtered view, actions like find and replace, order now or export to excel automatically affect just the items in the current filtered view. This is powerful!

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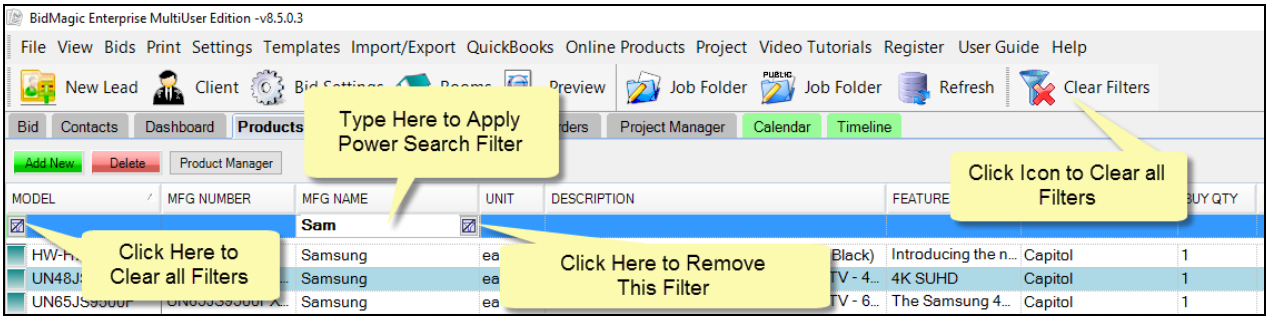
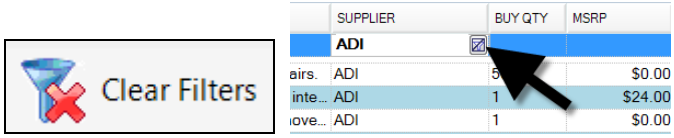


Whenever you are viewing a filtered selection, the Clear Filters Icon will appear at the top of the screen. This is a reminder plus the quickest method to clear all filters. You will also find a small blue funnel at the far left to clear all filters or click the funnel within a filtered column if you wish to clear just a single filtered choice.



After entering or editing data in BidMagic, hit TAB (the Tab key on your PC keyboard) when you are finished to confirm the data and move to the next field. In the Product Table, hit Enter/Enter or Shift/Enter to confirm the data.

SETTINGS MENU

DEFAULT SETTINGS FOR NEW BIDS (GLOBAL SETTINGS)

Before writing proposals, set up your default settings. If you are a multiuser, you will need to be an administrator to open this screen. Setup your standard hourly rates for Prewire, Trim and Finish labor. Entering Labor cost is used for accurately determining profits. Set your default Design/Management percentage rate. Since this is a percentage of the total equipment and labor, it could also be used for overhead. If you want to include sales commission in your cost, you could add that percent to the Design/Mgmt cost, which will reflect in the Profit Reports for this job.

Take time to setup your default Sales tax choices. Sales tax is generally charged on the sale of tangible goods. In some states taxes are charged on installation labor, construction and repair services. Other states charge Use tax (based on cost) for Products that become part of a structure. Set these values before creating proposals. Check the Surtax box if you need to charge surtax. To view or change labor rates or tax choices for a bid in progress, make them in the Bid Settings window. Check the boxes in the bid summary to charge taxes on other items including shipping. You can also go to Settings/Tax Rate to add other rates you might need.

Settings also include Decimal Places for QTY, AutoLink Package Settings, Price Levels, Walkthrough Mode and System Organization. Select if you want to require approval for Jobs before ordering or scheduling begins. Also select to use the New Word Merge Templates or do not check to continue with original template system. Shared Path Management and Purchase Order setup features are available for Enterprise users to manage access to Templates, Job Folders and more.

Combine Bid Items in same room works this way: If you have 2 TV's in a room and you later add 3 more of the same product to the same room, BidMagic will combine both and show QTY 5 on that

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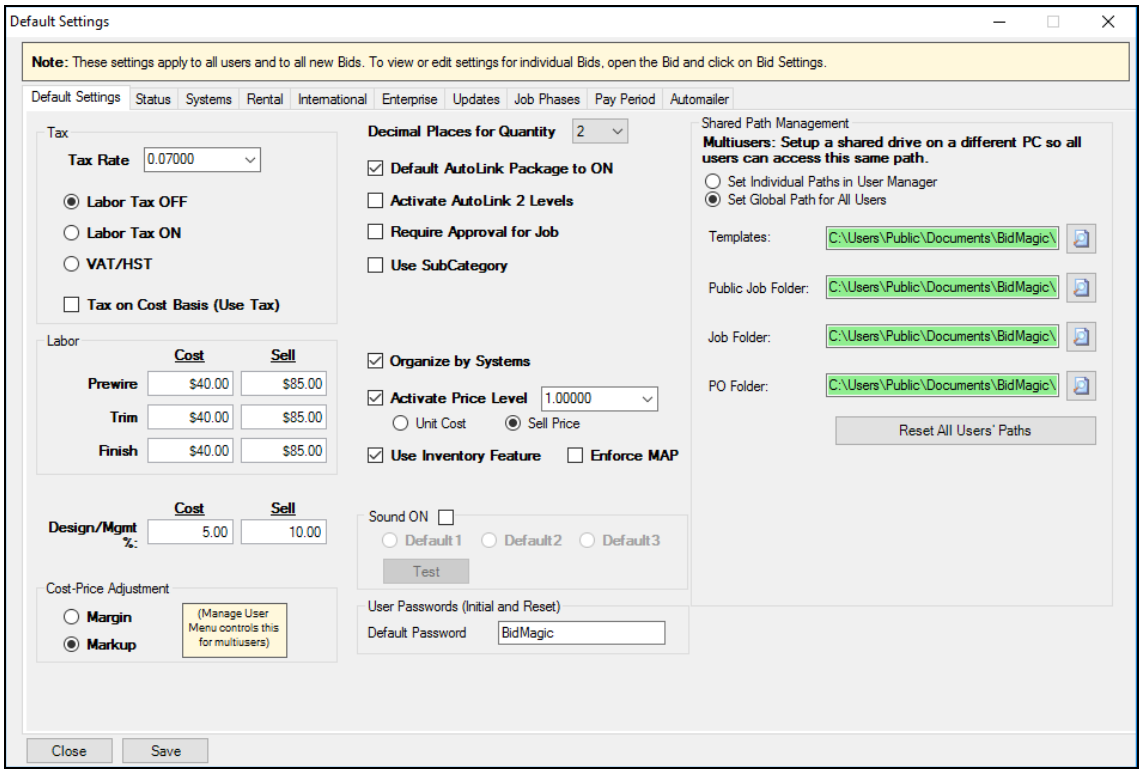
line. Note: If this choice is not checked, the bid will show two entries, QTY 2 on the first, and QTY 3 on the second. FYI, the normal way of adjusting a quantity would be to click on the existing line item QTY to adjust the QTY from 2 to 5.



Rooms (Section Headers in a Bid)
All Rooms: This is a header or divider in bids and can be a room, zone, area, system or other section type. Add, Edit, Delete the master list of Rooms. Changing or deleting a room will not affect existing Proposals. If a Room is being used in a Proposal, it may not be deleted.

Rooms in Bid: Shows all Rooms in the current Bid. Create Favorite Room text descriptions and assign them to the Rooms in your Bids.(Pro Version only)

Organize by Systems (Pro/Enterprise Feature)
You can activate System features here for all new bids. When System features are active, you can add, edit and delete your systems list and the order they sort in bids. If you activate the Systems feature, we recommend assigning a system to ALL products in your bids. When adding Products with an AutoLink Package, please select whether the Product's system should be used, or whether to inherit the System setting from the Master Product. You can choose to set Autolinks to normally be ON or OFF.

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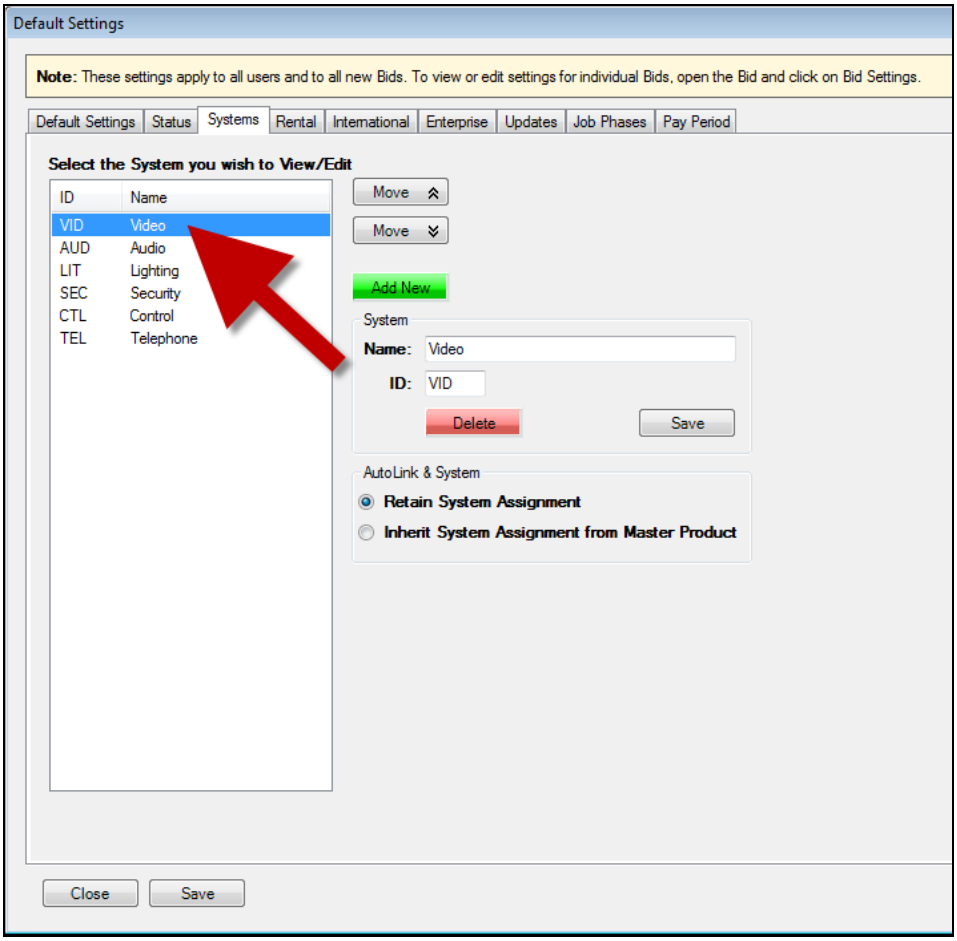

Rental Features (Pro/Enterprise Feature)

You can activate rental features here for all new bids, or within the Bid Settings window for individual bids. Set up default multipliers for day, week, month, year terms. When rental features are active, additional boxes will appear for the rental duration. Custom1 rental is a special template for printing rental proposals that appears in Print Preferences when rental features are active. A bid cannot contain both sale and rental items.

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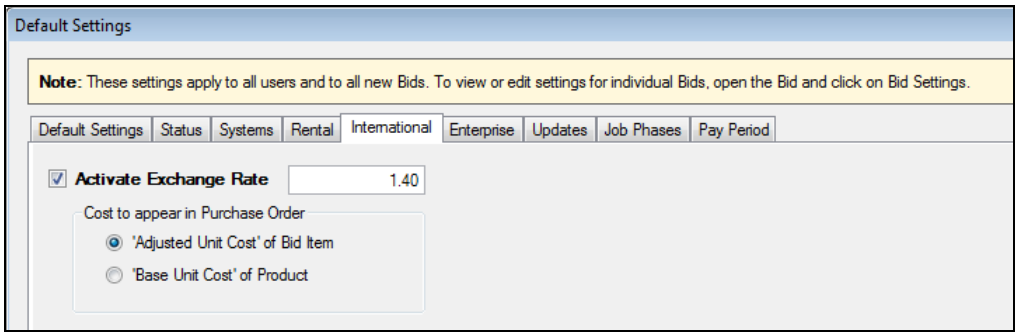
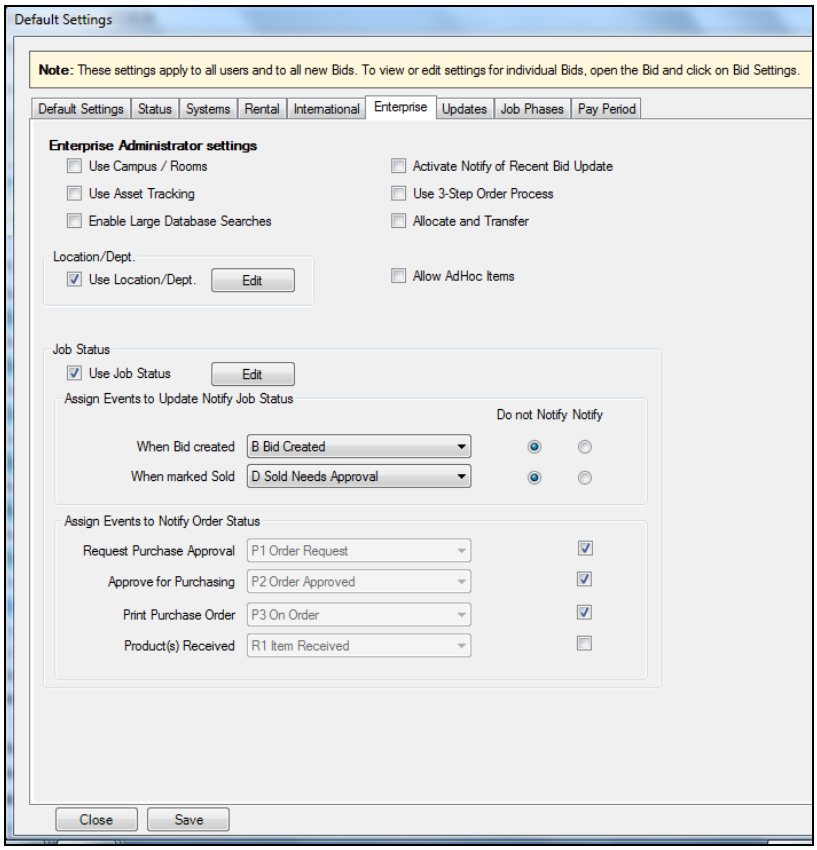
International Features

You can turn activate Exchange Rate features. This allows you to automatically adjust for transactions involving foreign currencies. Users can select products that require cost adjustments that are affected by Exchange Rate settings. Purchase Orders can be set to show Base Unit Cost or Adjusted Unit Cost. If the Exchange Rate is changed, users can choose to recalculate the cost of all affected products globally.



Enterprise Features (Enterprise Version)

BidMagic's Enterprise version adds a complete layer of management oversight. That includes Enterprise user permissions, Job status tracking and notifications, multiple locations or departments, inventory control, central purchasing screen, three step order approval and more. Enterprise features are found towards the end of this user guide. New Enterprise users will need to spend time setting up special features and permissions. We have a separate Enterprise version guide and setup worksheet to assist with this.



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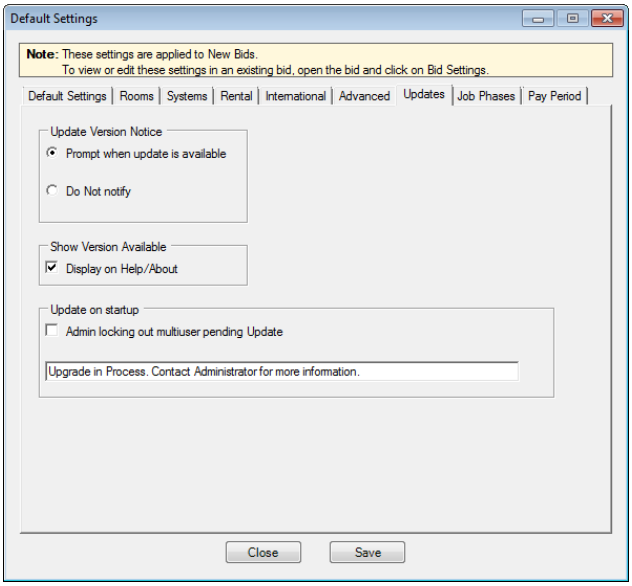
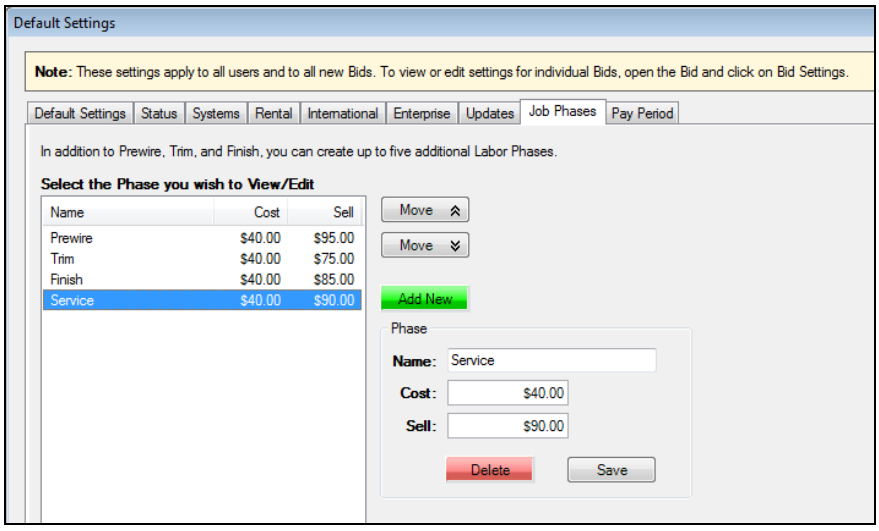
Updates to Software

This screen controls how your PC will respond to automatic software updates. When multi-users install updates, it is important that all users run the updates at the same time. Administrators can control that process by locking out users during the update process. Set permissions in the User Manager to designate one or two trusted users who choose when to run updates. This is very important because in a multi-user environment, when one user updates their software to a new version all users must update at the same time.



Job Phases

BidMagic comes with 3 Preset Phases of Prewire, Trim and Finish labor. This screen allows users to add, edit and manage additional phases that are calculated by the hour. Each Phase can be assigned an hourly Cost and hourly Sell Price. Use the Move buttons to set the order of how the phases will appear in Bids, Reports and Project Management. Phases that are used in a Bid cannot be deleted. A phase name can be renamed, but this will also change the phase names in existing bids, which may be undesirable. Generally, one of these phases is selected as the Order Phase to indicate the time when a product needs to be ordered and installed.



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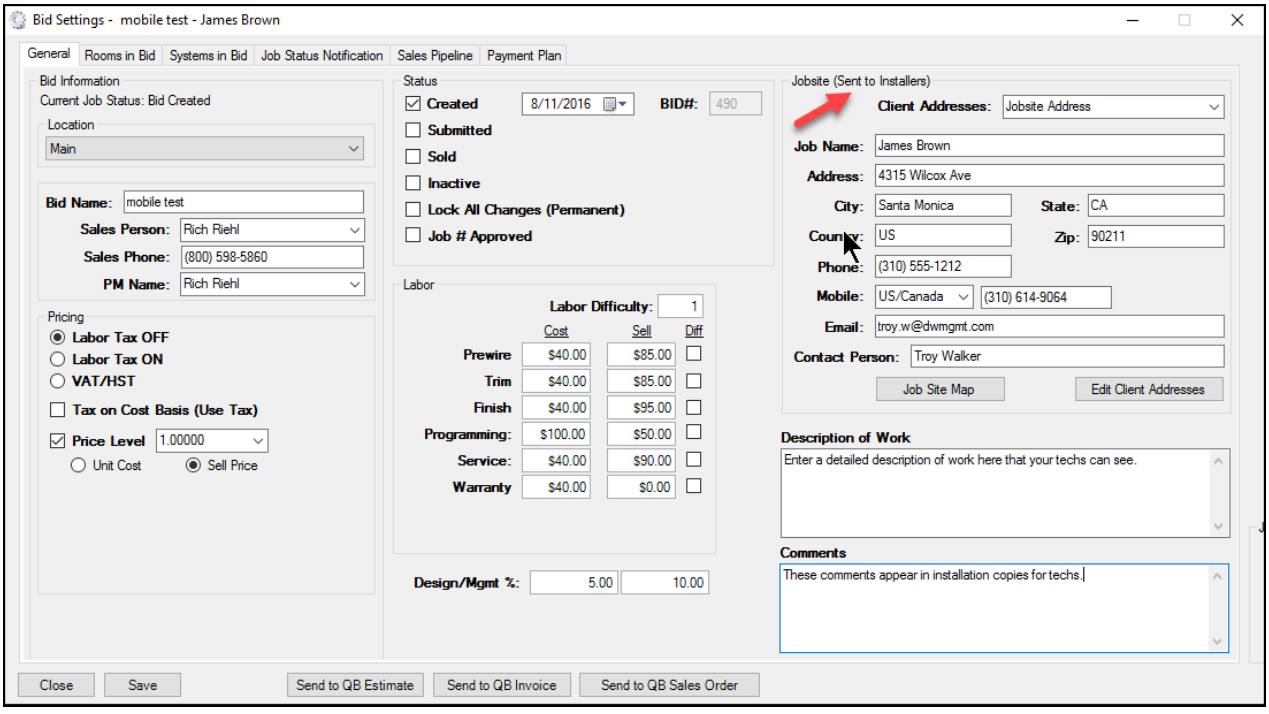
BID/JOB SETTINGS (FOR INDIVIDUAL BIDS)

This is a very important window containing the client info, the jobsite info and proposal status info for the current Bid. While Default Settings establish global choices for new bids, Bid Settings lets you view and edit these settings for each individual bid.

The General Tab shows Labor Cost and Sell Prices, Price Levels, Tax choices and Design/Mgmt percentage can be viewed and adjusted here for the current Bid. Design/Mgmt is entered as a percentage, so 10.0 would equal 10%. Be sure to enter a percentage for your cost. This can also be useful for overhead or for including the cost of sales commission in your profit reports. This value can be set up to 50%. These changes affect ONLY the Bid you have open. Also use this form to keep track of all the information regarding this proposal. By inputting the current status and date, sales reports can be created to see how many proposals are at what stage, which need follow up and give breakdowns by salesperson. Pro/Enterprise Features include tabs for General, Rooms in Bid (manages Room Descriptions), Systems in Bid (manages System order).

Set the Status to keep track of Bids that have been created, submitted, sold, Inactive, etc. Fill in this info for accurate tracking and Sales Reports. The Bid Name and Jobsite info can be edited here if needed. Fill in the Jobsite address and phone numbers for this bid. Be sure to include the Description of Work and Comments that will be included in Service Tickets and Installation copies. This will be included in installation copies and work orders sent to your field techs. Text message alerts can be sent to the Client mobile phone shown here via the optional Tech Calendar system. Pro and Enterprise users can add and select from a variety of Client addresses related to this client.



Rooms in Bid/Job

The Rooms in Bid/Job Tab allows you to see the Rooms in this Bid/Job. Pro & Enterprise users can add room descriptions and save favorite room descriptions here to be included in proposals. The Job Number tab shows the Job Number. Pro and Enterprise users can edit the job number and establish rules for approving jobs before ordering or scheduling begins.

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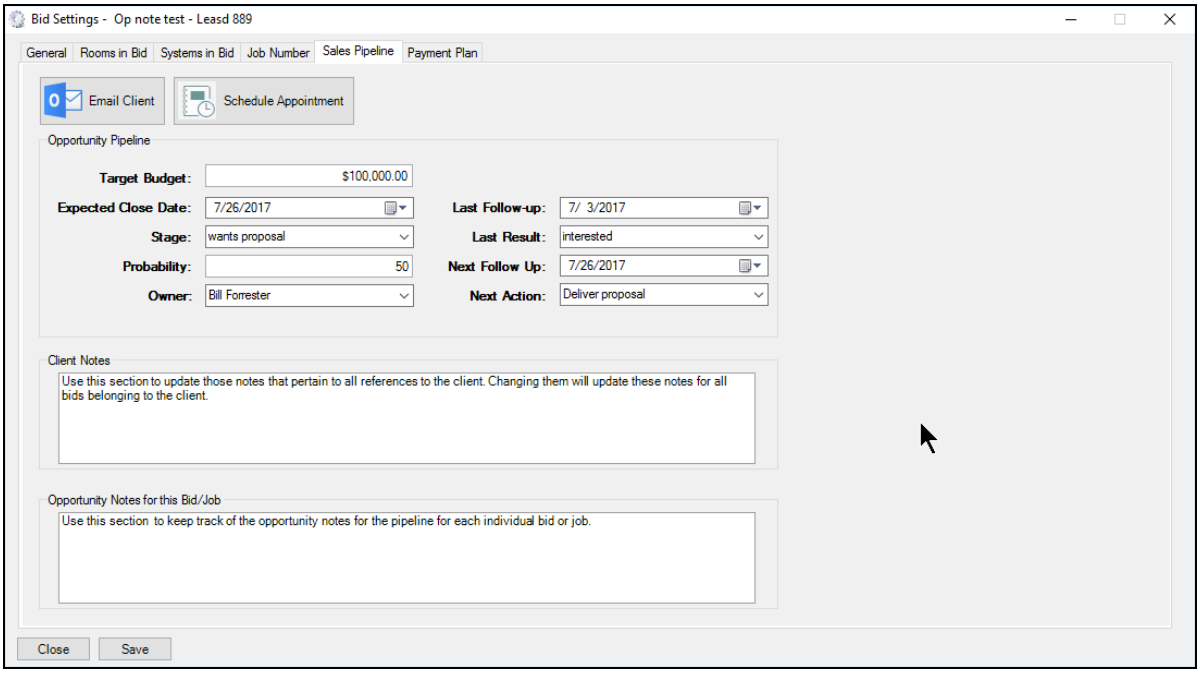
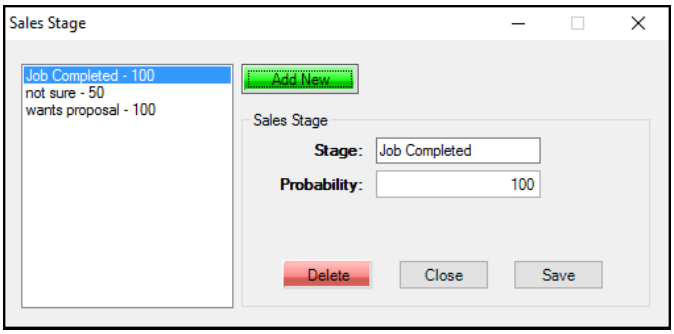
Sales Pipeline Tab

The Sales Pipeline tab includes the target budget, expected close date, opportunity notes for the client and for the active bid or job. Pro and Enterprise users can connect to Outlook to email clients and create appointments in their Outlook calendars to follow up with clients. The pipeline form is found in Bid Settings or by right clicking on a sales lead. Keep track of the Target Budget, expected close date, probability to close, opportunity notes and when to call your lead back. Pro/Enterprise users can email the client or schedule an appointment directly onto their Outlook Calendar.



Sales Stage

You can setup sales stages and automatically associate the probability to close with each stage. This is very helpful to manage the stages your organization uses on a regular basis. This form is found under Settings Menu/Sales Stage.



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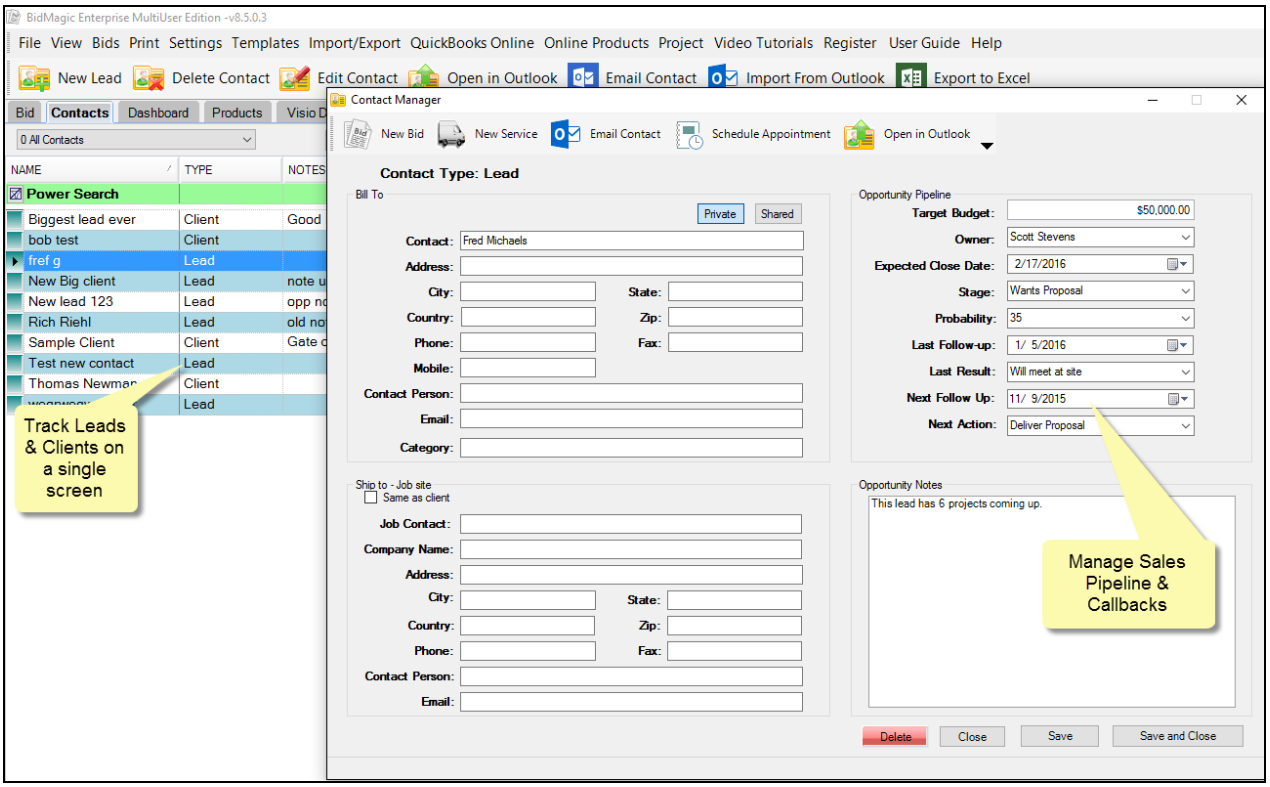
CONTACTS: LEADS & CLIENTS

The Contacts screen is ideal for managing both leads and clients. It is important to know that in BidMagic, leads are contacts who do not have a bid or service call associated with them. Clients are contacts with an existing bid (even if the bid is not marked sold) or a service call. It is super easy to track who you needs to call, when to follow up, when you expect to close and the probability to close. This generates sales pipeline graphs and budget expectations. It is important to understand that leads in your sales pipeline are not the same as clients (those who have a Bid or Service Call in BidMagic). BidMagic does not allow duplicate lead and client names.

The contact screen shows both leads and clients with the ability to set a filter to view leads only or clients only. Keeping these separate is important because you might have hundreds or thousands of leads who you are prospecting, but you do not want to confuse them with active clients. To create a new lead, click the New Lead Icon. This will create a new lead. Then you can create a Bid or Service call which will automatically convert the lead to a client.

Once converted, you will see the client and Bid or Service Ticket appear on the Dashboard. The Dashboard does not show leads. It shows Clients and their associated Bids and Service Tickets. Right clicking on a Client on the Contact page will allow you to view all bids and service calls for that client in the Dashboard. When a client has multiple bids or service calls, each one is tracked separately in the dashboard and can have unique contact information for each entry. Note: Deleting all bids for a client will revert the client back to a lead.

The Contact table view shows a global list containing your leads and clients. Note the top row of icons for creating, deleting, editing contacts and more.



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BidMagic Pro and Enterprise versions add integration with Outlook, allowing users to instantly send email to the selected contact via Outlook or import contacts from Outlook. The Outlook integration is very full featured and includes ability to create appointments and more in. You can also create a new Contact in BidMagic and then send it to Outlook. (Requires MS Outlook 2007-2016 – 32 bit version.)

Multiusers can set permissions to allow users to view their own contacts or all contacts. Sharing a Contact allows other users to view and edit the data. This is important when individual sales people need to maintain their own contact list. If one sales person departs, an admin can reassign their bids and leads to another sales person. Client contact information is not hidden from other users.

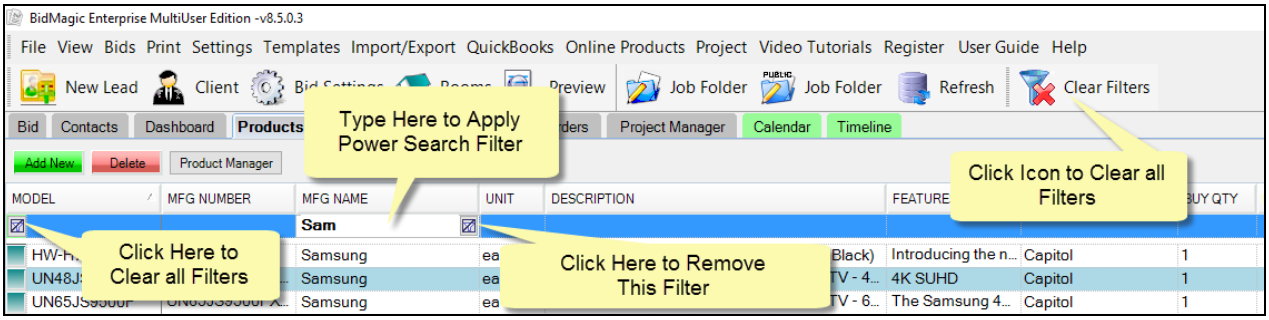
The Power Search Filters in the green top row provide instant search results. Sales people can easily sort these contacts by follow up date, target budget and more. Right click on any contact to open all the details for a single contact. the green top row provides instant search results. Right click on any contact to open all the details for a single contact.

PRODUCTS TABLE – GLOBAL PRODUCTS VIEW

This is located on a tab at the top left of the screen. Like an Excel spreadsheet, clicking on the column headers will instantly sort the columns to help you find what you are looking for. As you scroll right, the Model numbers remain anchored on the left. Hit Tab to go to the next entry or Shift Tab to go to the previous entry. By holding down the shift key, you can click on additional columns to sort with multiple criteria. You can also modify the order of the columns by dragging and dropping them in your preferred order. If you have over 20,000 products, you can turn on Pagination in the View Menu. This may speed up your searches, but shows limited results and requires navigation from page to page. We recommend upgrading to the Enterprise version if you have over 20,000 products loaded.

Product Table Power Search

The top row Power Search Filter searches Products in any field that a user selects. Filtered search results will display as you type. Hit Clear or the ALL Tab to view to all Products. True (T) or False (F) can be entered for checkbox entries. (True = checked, False = unchecked) The bottom right of the screen will show the total number of products and the number of products in the current filtered search results. If Pagination is off, the filters will show results from all products. If Pagination is on, only the results from the active page will be shown. Click Page Down to see more results. Click on the Funnel Icon to clear all Filters.



Index Tabs

Handy index tabs are located along the right margin of the Product Page. Click on any field header to select it, then click on an index tab to locate product information beginning with the letters shown. The All button will once again view all Products. If you activate Product Pagination (not recommended unless you have over 25,000 products), Up/Down arrows will appear for navigating through pages of Products. The 0-9 Tab can be used to display checkboxes with entries. (0-9 = checked, A-B = unchecked)

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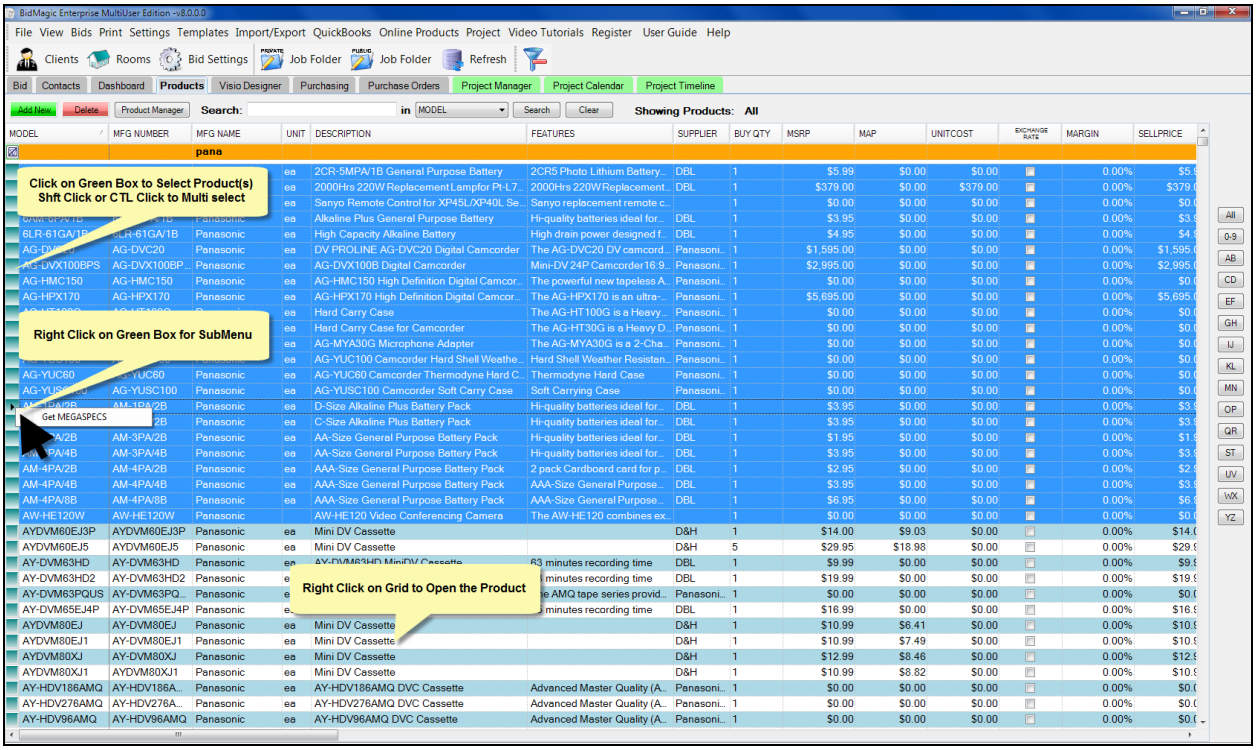
Navigating in the Products Table

Right click on a Product in the Product Table (global view) to open it in the Product Manager (single Product view) or to perform functions from the Navigation submenu.



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ADDING PRODUCTS TO THE TABLE

Before you can create proposals you will need to enter your products. There are a few test products (marked with 'SAMPLE' in the Memo field) preloaded for you convenience. These products and prices are only test examples. Please delete these products before you load your own. Also check all other preference settings, such as hourly rates and tax, etc. to ensure they are right for your use.

Selecting Products to add is a very important step for your company. Deciding exactly which products you want to sell, the prices you charge and your installation charges is a crucial step to managing a successful business.

We suggest that you do not enter every product available from your suppliers. Target just the items that fit your style and the price points of your clients. This process only has to be done once and it can take several days. Once you have entered the products and pricing, you will have the power to write lightning fast proposals! Automating your prices has so many benefits.

You will begin by entering the products, prices and details of the items you want to sell. Model Number is limited to 60 characters. Features is limited to 700 characters. It is important to set standardized pricing for your products, installation, cable, etc. This is a vital step in successfully managing your products, prices and profits. You can create new suppliers and categories from the associated menus or directly from within the Product Manager. For products and services that do not need to be ordered, set the supplier to ‘None.’

If you already have this information in Excel, QuickBooks, or another program, you may save time by importing the info into Excel and formatting it to import into the BidMagic Product Table. See Importing Products later in this manual.

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Common Field Names	Notes
BuyQTY	default 1. Example: 500 if you buy 500’ of cable in a reel (important)
CableHard	Equipment Sell Price
CableHardCost	Equipment Cost
Category	Pick from Categories you define
Depth	Decimal or Fraction
Description (required)	Short Description
Discontinued	Product Discontinued
Features	Include Long features here
FinishHr	Labor in Hours
Height	Decimal or Fraction
Install	Labor Flat Rate Sell Price
InstallCost	Labor Flat Rate Cost
TaxAmount	(True/False - do you charge tax for this equipment?)
isTaxLabor	(True/False - do you charge tax on labor for this item?)
MAP	Minimum Advertised Price
Margin	Profit Margin Percentage
Markup%	Markup Percentage
Memo	For your own notes
MFGName	Manufacturer’s Name
MFGNumber	Manufacturer’s Part Number used to order
Model (required)	Model Number to find Product (usually in Client Copy)
MSRP	Manufacturer’s Suggested Retail Price
Order Phase	Order Phase- Single Phase when product ordered and installed
PrewireHR	Labor in Hours
Product Image	Path to Image for importing (ie: C:\MyPictures\Model123.jpg)
ProductUrl	Link to website where Product info is located
Program	Labor Hours for Programming
RU (Rack Units)	Height in rack spaces
SellPrice	Price Shown in Client Proposal
Shipping	Flat Rate
Supplier	Pick from Suppliers you define to create purchase orders
System	Pro Version - Type ie: Audio, Video, Security, Lighting, etc.
Total Installed Price	A Calculated Value
Total Labor	A Calculated Value
TrimHr	Labor in Hours
Unit	(Unit of Measure) ea, pr, ft, mt
UnitCost	Your Cost
Updated	Last Date Updated
UPC	Universal Product Code (Barcode)
URL	Web address Product information link. (www.sony.com/products/KVXBR3417.html)
User 1 – 4	User Assignable (Edit name if desired with Label Mapping)
Weight	Any number for your reference
Width	Decimal or Fraction
RentQTY	Quantity of Rental Units
RentUnits	Day, Week, Period, etc.

(see our product library web page for excel import template with the current list of fields)

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ADDING PRODUCTS TO A BID

All Proposals begin by selecting an existing Contact or Client. Then Click New Bid. Once a Bid is created, Select the ROOM, select the MODEL, then click ADD in the bid entry screen on top. We have included a few sample products so you can write sample bids right away. The yellow 'fudge factor' boxes at the bottom of the screen allow you to apply adjustments to your standard prices for the varied needs of each proposal.

After the proposal is done, click Print to select the type of printout you desire.
This program is can be installed on a single computer or on many computers. It can connect to the database over a local network or on a server or other web location. All of the bids, products and prices are stored in that database. On the top of the Bid page, click on the Products menu choice. This will take you to the Products Table.

Click the Add button to open the product entry window. Each model number must be unique. You may use manufacturer's model numbers or create your own numbers. In many cases the model number and the manufacturer's model number will be the same. Be sure to enter both. This allows precise order numbers on your purchase orders.

Duplicate model numbers are not allowed. Fill in the description, price and all of the other product details. Please enter all of the requested information as you will need it in creating proposals and reports. Unit means unit of measure (each, pair, feet, etc.) Enter a check in the Taxable field if you normally charge sales tax for this product. Sales Tax is calculated for products, and can optionally be charged for labor if that feature is selected in the Bid Settings.

After creating a new Product, it must be saved before Autolinked Products can be added to create a Package. Hit Save, then proceed to linking any Products.

If you want to add a product to your bid, but do not have it in Search My Products, click ADD NEW to quickly add the product. Model and Description are required. Multiusers may need permission to create new products or may be able to create Ad Hoc (miscellaneous products) only.

What the Client Will See in the Printout

As you create the models, give special attention to the items that will appear in the client's copy. Clicking the Preview icon shows how the client report will look with the currently selected Print Preferences. You will need Word 2007 or newer to preview and print reports. We recommend a color laser printer to add color to your proposals. Here is an example of a line item:

1 Multiroom Audio Controller $1,999.00
Audioaccess PX700
The center of your whole house music system. Provides 6 zones of music with 6 sources.
Works with elegant, easy to use keypads. Black with universal remote control.

Description: MultiRoom Controller.
Manufacturer's name can automatically be added to the printout from choices in Print Preferences. If you do not select this preference, you have the option to include or exclude the manufacturer's name in the Product description. Keep this description short to fit (max is 50 characters) Always shows.

MFGName: Audioaccess
Note: This is the manufacturer's name used for adding to the bid. This appears on client bids at the beginning of the Description when "MFG Name" is selected to show in Print Preferences. Keep this short to fit. (max is 25 characters) Can show/hide.

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Model: PX700
Note: This is the model number used for adding to the bid. This appears on client bids unless hidden. Keep this short to fit (max is 25 characters) Can show/hide.

Features: The center of your whole house music system. Provides 6 zones of music with 6 sources. Works with elegant, easy to use keypads. Black with universal remote control. Can show/hide. This full length feature description can be up to 700 characters. This is where you can include all the important details about the product.

Total Price (Showing Equipment Price): By default, line items show the client the total sales price for the equipment without adding labor to it. Labor charges are shown separately in room/area totals and in the Bid Summary section at the bottom of the screen.

Total Price (Showing Labor Price): To create a Labor Only Product, add any labor charges you wish, but set the SellPrice (equipment) as $0.00. When Show Line Item Labor is selected in Print Preferences, Products in a bid with a total equipment price of $0.00, will display the labor charges for that product instead.

Total Installed Price (Total for Equipment & Labor Price): This feature is available in the Custom 7 Template. (Pro Version only)

Unit
Choices for unit of measure are default ea (each) pr (pair) ft (feet) or mt (meters). If 'ea' is selected it will not print in the reports. If pair or feet is selected, it will print after the QTY.
Here is a sample:

1pr Inwall Speakers $398.00
Sonance TR700

Please verify that your pricing is setup for pair or each. Bulk Cable is generally priced to sell per foot and can be ordered by box or reel if properly setup.

Fitting Descriptions to the size allotted:
If Product descriptions are too long for the page margins, they may spill over into the next line or possible push tabs onto lower lines. If you encounter this problem, you can shorten your Description, choose smaller or thinner fonts (in the document or template) or pick another template that allows for additional space. You can make quick manual adjustments in Word if this occurs or if you wish to adjust page breaks, etc.

Creating A Special Product for Customizable use:
Sometimes when working on a proposal, you will find the need to add a product for one-time use. Here is a suggestion. Go to the Product Page, Click Add New and create a new product to have ready for quick customization. Enter Model "Custom Part". Since every product requires a Description, copy that into the Description also. Then Click Save and Close.

Now every time you are working on a bid and need to add a quick part, just add the Custom Part and add the Description and Pricing to the Bid. Then you can add pricing and description for that Product in the Bid. For example: Custom Faux Paint Inwall Speakers. $49. This type of Custom Product can be added to any Bid and Customized as needed very quickly.

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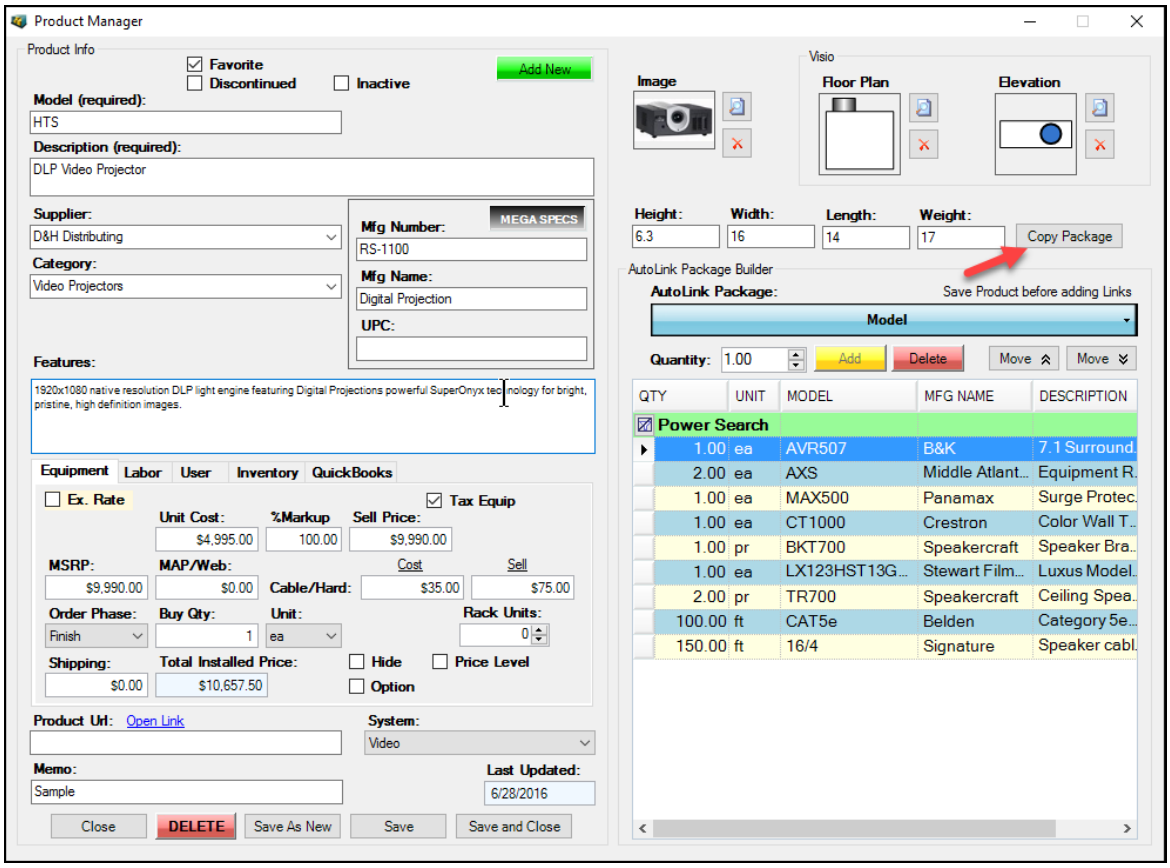
PRODUCT MANAGER (SINGLE PRODUCT VIEW)

This button is located in the upper left of the Products Page. For instant access, right click anywhere in an existing product to open it in the Product Manager window directly. This is the fastest way to make any changes you wish to the product. Hit Previous/Next or Tab to go to the next entry or Shift Tab to go the previous entry. The favorite checkbox sorts the product to the top and highlights it in bold. Discontinued and Inactive products cannot be added to bids. Note: products in existing bids will still appear in those bids even if discontinued, inactive or deleted.



You can change all details of products here and also manage the Products in the Package on the right. These changes apply to the Product the same as in the Product Table.

After making changes, select ‘Save’ to edit the product or select ‘Save As New’ to create a new product with your changes. For ‘Save As New’ Enter a new unique Model number. (duplicate Model numbers are not allowed)

You can also click on any box in the Product Table and make changes directly on the Product screen. If you want to change a model number, that can only be done on the Product screen. You can also copy packages to simplify adding them to other products.

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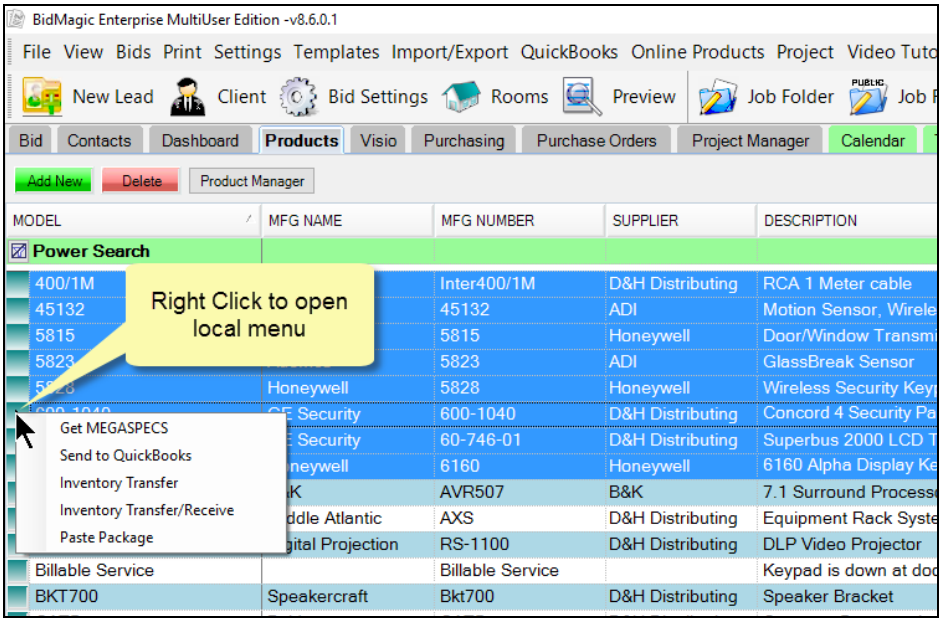

Copy Package

Click the Copy Package button to add the package to additional products. Then navigate to the Products Table, right click on the green line selector (or shift click to select multiple lines) then click Paste Package from the local menu.

Product Images (Mini Cut Sheets)

Select images for key products that are important to show your clients. Many product images can be found in BidMagic's vast library with 4 search engines in MEGASPECS. Images can also be obtained by typing the model number in Google Images that can be saved to your PC. Avoid using images over 25K in size. BidMagic will scale down the images to approximately 300x300 pixels. You probably will not want to add images for cable, connectors, hardware and misc. parts. Pro/Enterprise users can also include Visio Shapes for Floor Plan and Elevation drawings. (optional)

Deleting Products from the Products Table

When a model number is discontinued or you no longer wish to sell it, you should delete it from your Product table. Important Note: If you open an old bid containing products that have been deleted in this way, the stored bid will still contain the deleted products with the pricing and details exactly the same as when the bid was created. Click on the gray/green box to the left of the product to select it. Then click the Delete button or use the delete key on the keyboard.

If you attempt to Print a Client Bid containing deleted Products, a popup window will alert you. You can choose to print the bid in its original form or you can make a duplicate bid and update the discontinued products as needed. We do not recommend making line item changes to original copies of bids that have been submitted or sold. Instead, create a duplicate and apply desired changes.

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Labor Phases
Installation Labor for an item can be broken down by making an entry of hours in the PrewireHR. TrimHR and FinishHR boxes. When Labor AutoCalcs are ON, hours that you enter will be multiplied by your hourly rate, which is setup in the Tools/Defaults Menu. **Before creating proposals, be sure to enter your labor rates for Prewire, Trim and Finish.** The Pro and Enterprise Versions allow customers to define and manage additional labor phases. Whenever you update your hourly labor rate these hours will multiply by the new rate so all of your labor prices can be updated quickly and easily. Please note the following decimal equivalents for hours:

1	= 60 minutes
.75	= 45 minutes
.5	= 30 minutes
.33	= 20 minutes
.25	= 15 minutes
.2	= 12 minutes
.1	= 6 minutes

This is very helpful for creating separate proposals for each phase of the work. If your proposal is for a prewire only, then create a model number that lists only prewire labor hours (PrewireHR).

If you choose to enter PrewireHR (hours) for cable installation by the foot, the following formula is helpful. What you want to enter is hours per foot or hours/feet

In one hour if an installer pulls 100 feet of cable
The amount to enter for PrewireHR is 1/100 = .01

In one hour if the installer pulls 200 feet
1/200 = .005

In one hour if the installer pulls 400 feet - 1/400 =.0025
If you prefer not breaking down the labor phases of installation, you can enter just a flat rate dollar amount in the Installation box instead. This is faster, but not as powerful. Leave the HR boxes empty if you wish to enter a single dollar amount for Installation instead.

Note: The proposal will calculate **both** the hours entered and the fixed dollar amount and add them together to determine the Installation total. Entering both will cause charges for both. Programming is always entered as a dollar amount (not hours) and is totaled separately from Installation. Within Print Preferences, you can choose to include a breakdown on labor phases in the Client Bid.

Select a Single Order Phase for Each Product
When you create a product, assign a single Order Phase to it. (The time when you plan to order and install a product.) Even though some products may involve multiple labor phases during installation - select the primary phase when the equipment needs to be delivered and installed at the site.

Entering Product Categories makes it easy to find products while creating the proposal. This also allows you to print reports based for tracking sales within these categories. It is important to understand that even a single product in a bid can assign labor charges for multiple phases or flat rates of labor. The screenshot illustrates the flexible control available and points out the labor summary items. In some cases, you may choose to simply add a single labor line item to a room or a bid, without the need to manage labor phases for each line item. This affects how much detail will be included in installation copies and work orders for assigning the specific labor.

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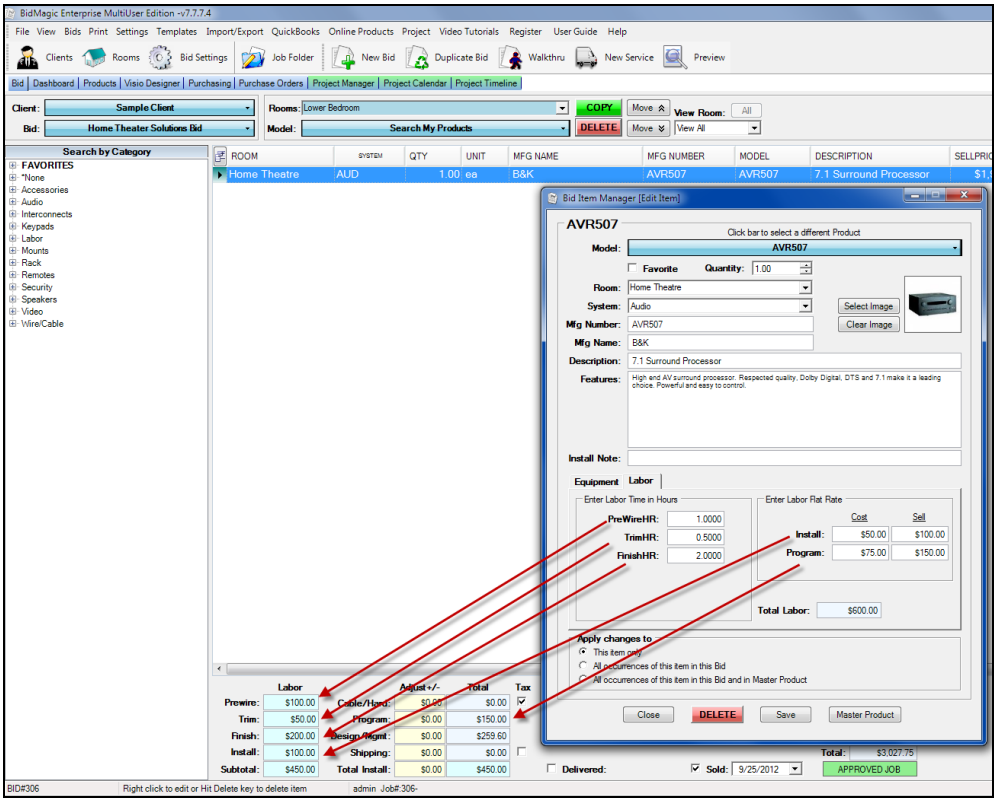

EDITING PRODUCT DATA

Each product currently in your system is shown in the products table. You may click on any field to update the information at any time. Confirm changes with Enter/Enter or use the handy shortcut: Shift/Enter. To delete a product, highlight the box to the left of the model number and hit delete. Deleting a product cannot be undone. Be sure to fill in as much data as possible into your products right away.

Right click on a Product to bring up the easy to use Product Manager window. This gives you a complete view of each Product and includes additional information like AutoLink Packages and Product Images.

TIP: Be creative with model numbers. PWSV for example could be your own model number for prewiring 2 speakers and a volume control. TVO could be your own model number to prewire and trim out a TV outlet. Add the prewire and trim labor HOURS that are needed along with the cable and outlet within this single model. The installation field allows entry of a fixed $ price for installing a product. This is helpful for products if you prefer to enter a fixed installation amount and not breakdown the hours.

Some users have requested the ability to hide the manufacturer's model numbers from the client. You can do this by entering your own in-house model number (Sony 42" Plasma HDTV) under MODEL. Then enter the manufacturer's part number in the MfgNumber. The MfgNumber will be used for your purchase orders.

FIND/REPLACE DATA IN THE PRODUCTS TABLE

This is a powerful time-saving tool allowing changes to many products at once. If you would like to make changes to a group of Product cells simultaneously, Find/Replace will speed up your editing.

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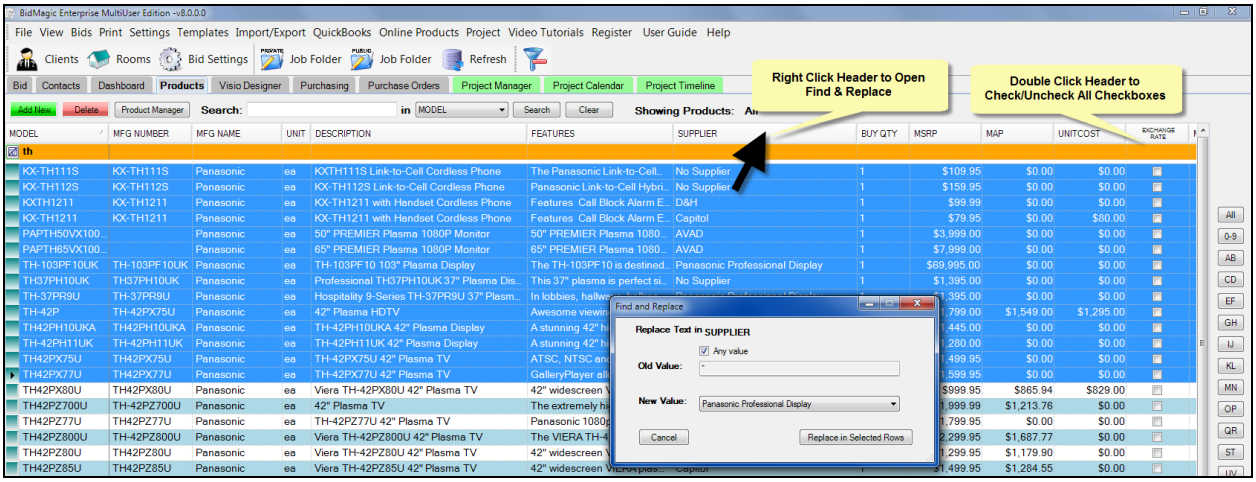
Hint: Clicking on any Product Header will sort that column is ascending or descending order. That or using Search makes it easier to group selected products for editing.



To Find and Replace specific values, simply right click on the column header. Choose to replace all or in selected rows. This method allows you to replace selected contents within cells.

To use Replace Any Value in a column, you must first select the rows you wish to edit by clicking on the green buttons to the left of the Products. SHFT click on the first item and then the last to select a large contiguous group of products. Use CTL click to selectively pick noncontiguous products. This method replaces the entire contents of the cell.

Then right click on the vertical column that you wish to work in. The Find and Replace window will open allowing you to enter text or data you wish to find and replace specific data or all values in chosen cells. Check the Any Value box to make changes to all selected data without regard to current contents. Changes are only applied inside the column you selected. You will see changes applied and have an opportunity to accept or cancel. Use caution when making changes to lots of data at one time.

CREATE YOUR OWN IN-HOUSE MODEL NUMBERS

You might create a model number PWTV - Description Prewire TV/DSS - which includes the labor, cable and trim ring needed for just prewiring.

Then model number TRTV - Description Trim-out TV/DSS Outlet - which includes the labor, wall plate and connectors needed for the trim phase.
Model number TVO – Description TV Outlet - the complete installation, which includes prewire, trim, wall plate… everything for the complete outlet.

This same method of multiple model numbers works great for Volume controls, keypads, inwall speakers.

An example of creating a labor only part number would be: Enter $0.00 for the Unit Price. (that is for equipment) Then enter $50.00 under Cable and 1 under PrewireHR. This will breakdown the cable and labor needed for prewire only. The Line Item Total Price will show $0.00 because no equipment was sold. However, the labor will be shown below in the Room/Area Totals and in the Summary section. Printing Preferences allow showing the labor price instead of equipment price for labor only items.

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We recommend that you list the supplier as ‘None’ for products or services that you do not order. This is also helpful as these products will be flagged in this way will not be added to purchase orders. Note, if you find later that you need to order these products, you can select another supplier before creating Purchase Orders.

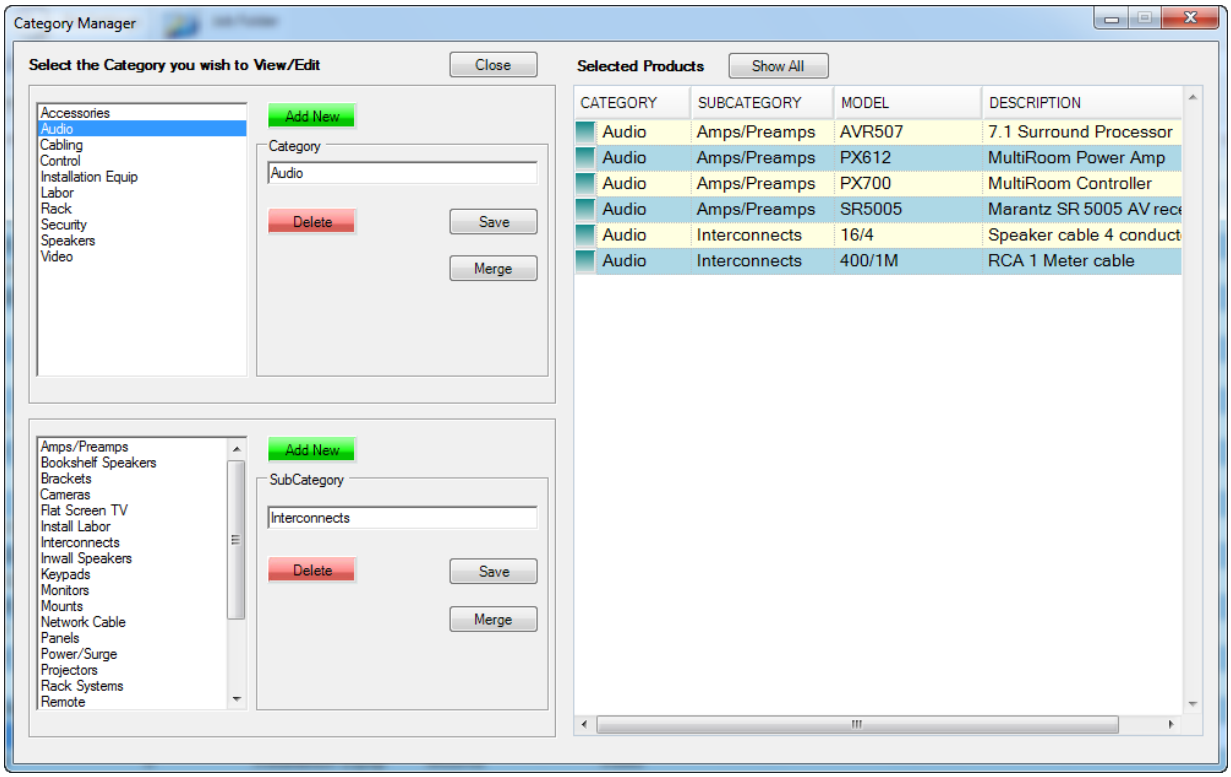
PRODUCT CATEGORIES AND SUBCATEGORIES

On the Settings Menu, select category. This allows you add, edit or delete categories and subcategories. We do not recommend activating subcategories unless you make a real commitment to managing this additional data organization. We suggest creating simple two level categories, like Speakers/Inwall if you wish to organize products neatly into two levels without needing separate subcategories. Click Add to create a new category.

Select a category from the list to edit or delete it. If you edit the name of a category, existing products in that category will be listed under the new edited category name. If you delete a category, existing products in that category will be listed with no category. You can also enter new categories directly into the Product Manager form. To add a new category, be sure to click Add New. Otherwise you will be editing an existing category rather than creating a new one. Highlight a category or subcategory on the left to see the products in that choice on the right. Click Show All to clear the filter.

You can select 2 or more categories or subcategories using SHFT Click or CTRL Click - then click merge to merge the categories or subcategories. The last category chosen will be the name of the new category. Warning, this cannot be undone.

If you use subcategories, they are not directly related to categories, so you can make any assignments you wish without restrictions.



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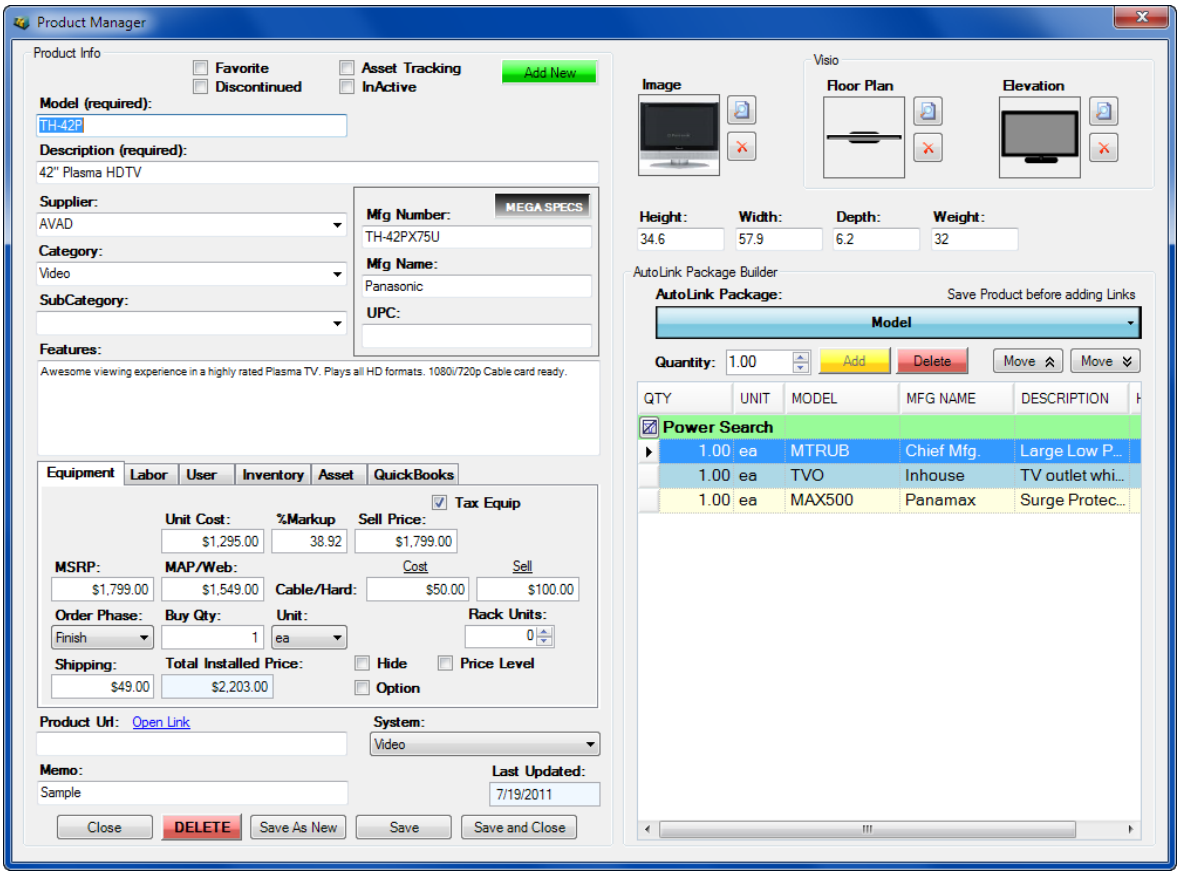
BUILDING PRODUCT PACKAGES

AutoLink Packages allow a product to automatically add a complete package (assembly, kit) of other products required. For example: Whenever you choose to sell a Plasma TV, you could create a package including interconnect cables, a surge protector, a smart remote, etc. A Surround processor could automatically link to add 4 Monster stereo interconnects.

A product named DSS dish could also link to: 600 feet of RG6, 8 F connectors, 1 mounting box and 1 - 8 way multi-switch. Each of these linked items would also contain the labor breakdown and prices associated with those products. You see this can provide very powerful automation of your proposals. In the Default Settings Menu you can choose to set Autolinks to normally be On or OFF.



On the Products page, select the Product Manager Button or better yet, right click on a Product. This opens the Product Manager window and the Package Builder window where you assign linked products. New Products must be saved before BidMagic will allow Packages to be added. Select a Master product to from the top dropdown box and hit enter or tab to select it. The lower window will show the list of products currently linked under this one. You may select any product set the quantity to be linked. Then Click ADD to add this to your Links. The items will be added to your bid after the master product in the order listed. You can click Hide if you want this linked item hidden in your Client Bid. (Pro Feature -see Hiding an Item)You can also control the order seen by client by selecting a linked product and moving Up or Down. Other package options are scheduled to be added soon.

By default all Links are assigned directly. In this mode, you can link a master product to a list of products, but none of those can relink to an additional level of products. In other words, think of the master product as a parent linked to a child, but the child cannot also link to grandchildren. All linked products are clearly stored and shown in the Package Builder table.

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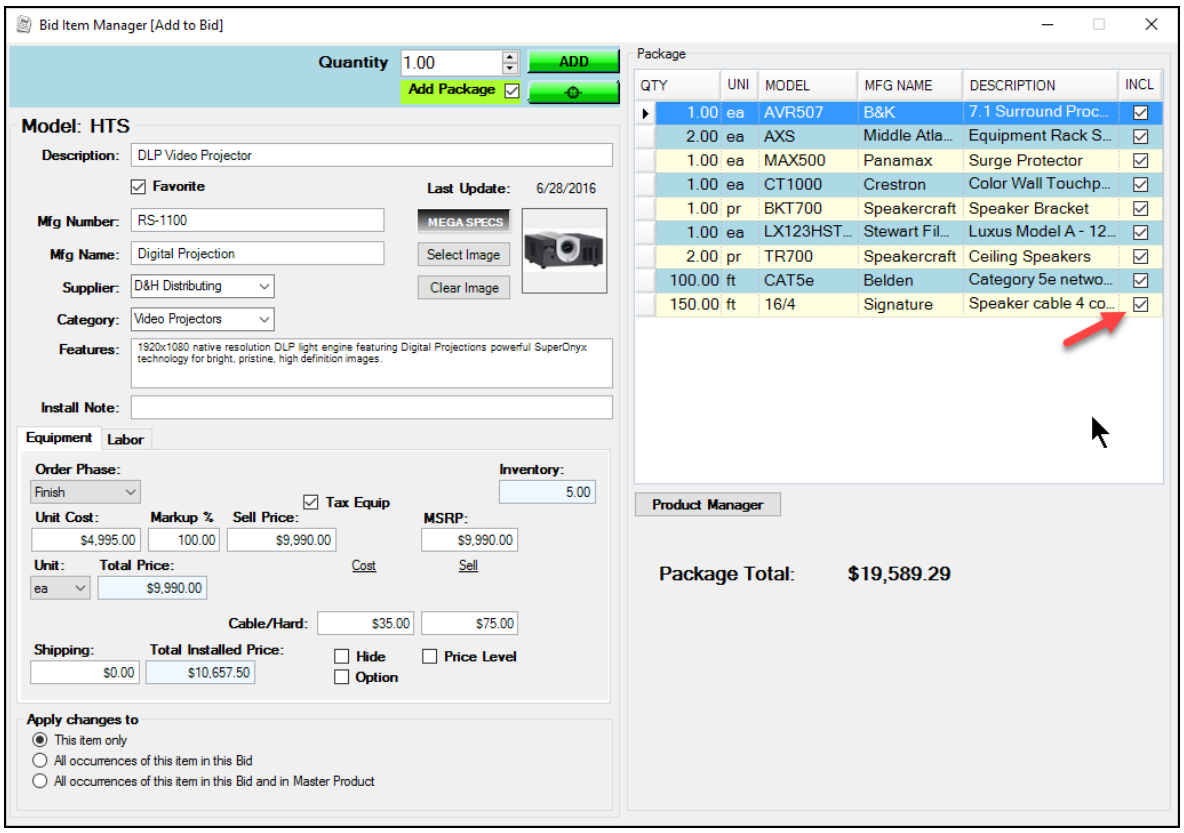
ADDING AN ITEM OR A PACKAGE TO A BID

First select a Product to add to a Bid. If a Package has been assigned to the Product you will see the Add Package checkbox option appear under the Quantity Box. Check the box to add the Product and the complete package. Uncheck the box if you want to add the Product by itself without the Package. If the Add Package choice does not appear, then no Package is assigned to the selected Product. Details of products in the package can be previewed in the Package Description on the right.

You can select the package items to be added with the Include checkbox. You can also adjust the QTY of the package items. Keep in mind that the quantity of items in the package will multiply by the number of packages. So if you add a Quantity of 2 packages and the QTY of an item in the package is 2, then 4 of those items will be added to the bid.



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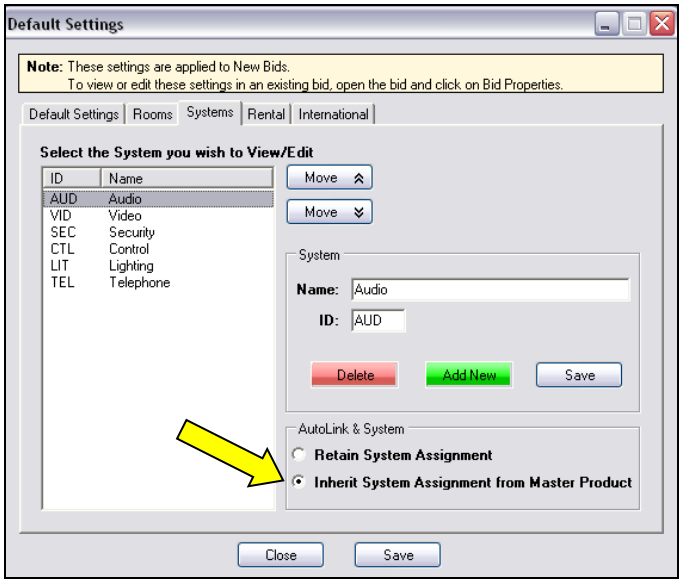
Using AutoLink Packages and System Assignments (Pro Feature) Together

Default Settings/System allows you to choose how AutoLinked Packages are added to a bid. AutoLinks can add Products from all System types, but when added to the Bid simultaneously in the bid, you can choose whether the Products will be Added with their unique System Assignments or whether the System Assignments will be inherited from the Master Product.



Adding Linked Products with multiple System designations will route the linked Products into their respective Systems as they are grouped on the line items in the Bid. These Products will not display in contiguous order but will ‘disperse’ and be placed in the respective Systems in the Bid.

If you choose Inherit System from Master Product, the System assignment of the Master Product will be applied for all Linked Products added, the System assignments of the individual Linked Products will be overruled and be assigned the same System assignment as the Master Product.

While the System assignment of the Master Product will be the default choice, users can elect to change the Master Product System assignment during the ADD process. After the Products reside within the Bid, their individual System assignments can be reassigned on each line item if necessary.

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ACQUIRING PRODUCTS AND PRICES FOR YOUR PRODUCT LIST

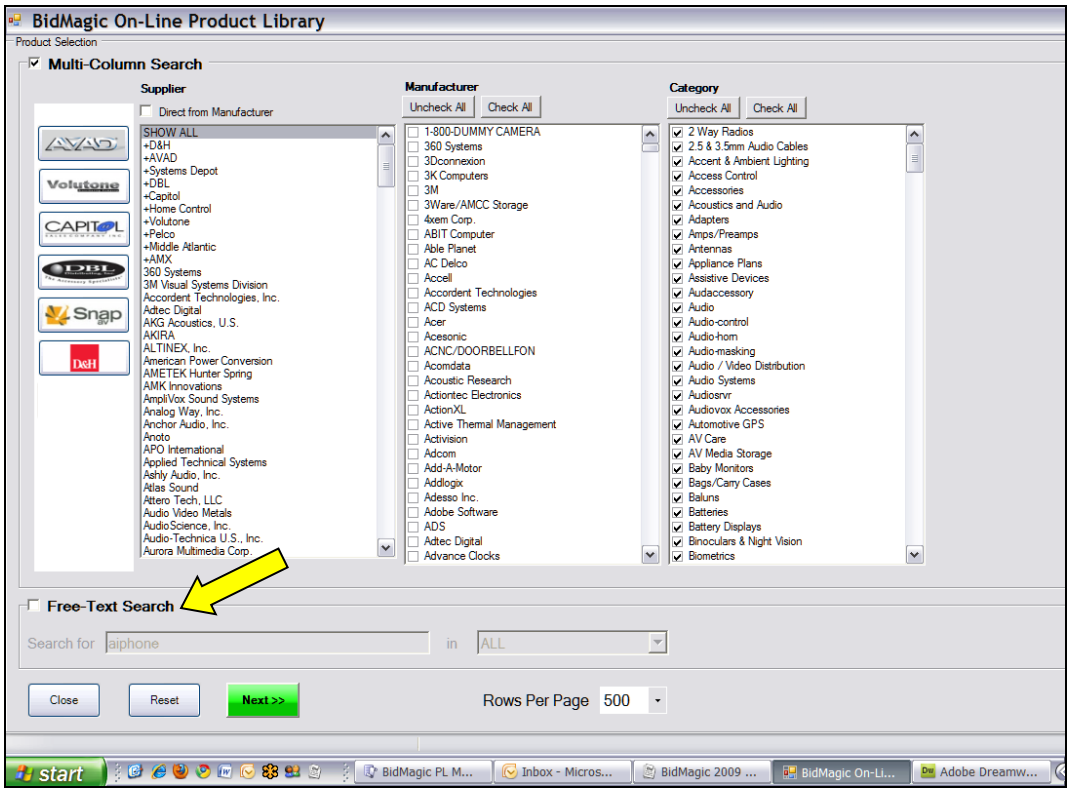
Acquiring product data from hundreds of manufacturers and keeping it up to date is a daunting task for installation companies. If your suppliers send you a current pricelist in Excel, you can import them with BidMagic's import wizard including your dealer cost. (See Import/Export Menu)

Beyond that, our users have asked us to help them keep their Products and Prices up to date. We have formed partnerships with the key suppliers in our industry and formatted their Product info for BidMagic. We have created a suite of 4 online search tools to help users get the best possible product data. Online Products includes the Online Product Library, MEGASPECS Grabber, AViQ Grabber and the Web Product Grabber. This is an optional subscription that will save lots of time and effort.

Search Online Products

Click on Online Products/Search Online Products to see the current list of brand names and Categories we have available. BidMagic makes it easy to search thousands of Products and then pick only the Products you want to carry. For your convenience: Importing this data will not overwrite existing unit cost, labor values or other user data that is not found in the On-Line Library.

Multi-Column Search allow you to select Products by Supplier, Manufacturer and Category. Major Suppliers have buttons on the left to locate their Products easily. These suppliers do the best job of keeping their information current and up to date. The new Free-Text Search allows searching in a specific field or in all fields.(slower) Make your choices, then hit Next. See up to 500 results per page and check the ones you wish to add to your Product Table. Continue this for additional pages of search results. Pick the products you sell even if you don't use that supplier. You can pick another supplier later. Tip - Don't bloat your database by adding products you don't really intend to sell.



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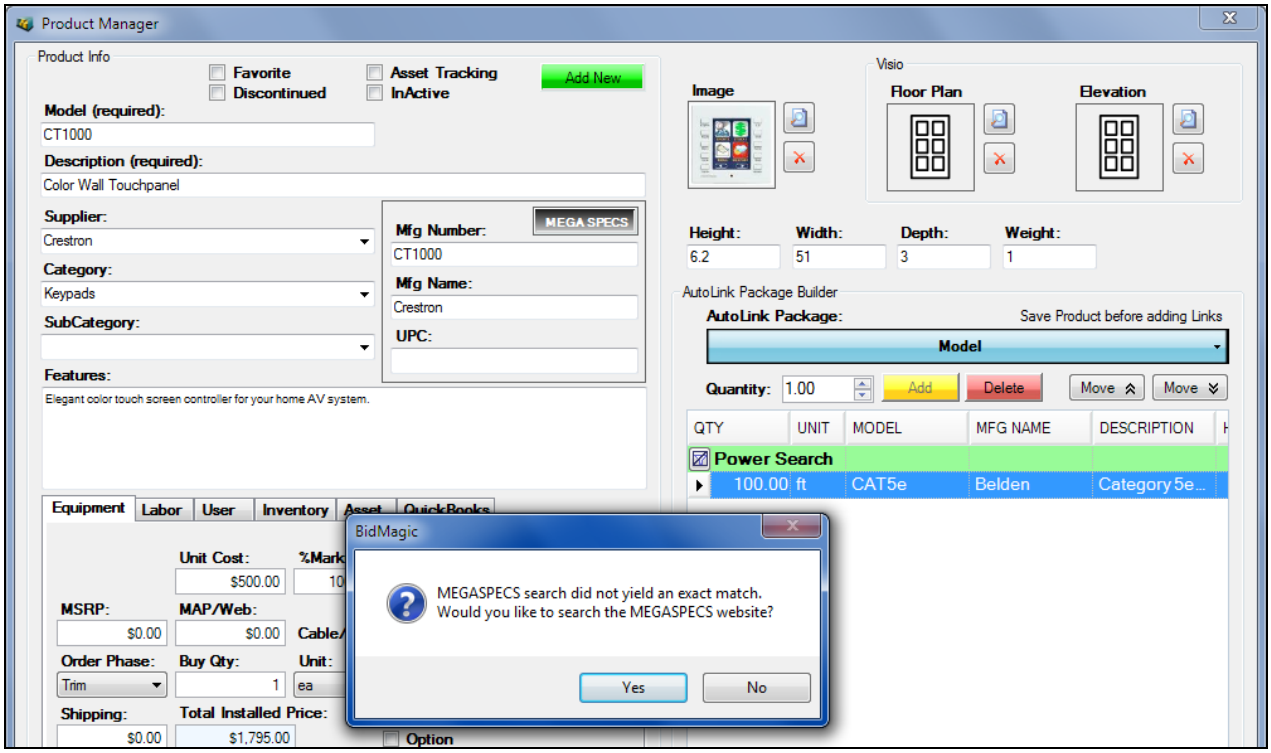
Update Product Data
Do you want to make sure your Product prices are current? Click on this menu item and BidMagic will update the information for your current Products without forcing you to browse through thousands of products you chose not to load. When Products have been discontinued, BidMagic will note this for you.

You have the option to subscribe to the BidMagic Product Library on a yearly basis. Please contact sales for more information or to purchase.

MEGASPECS (Included with Online Search Tools Subscription)
Do you want the most complete product info in our industry? MEGASPECS delivers the highest quality specifications, images and features for over 3 million products! This makes it easy to locate products and to instantly download the data into BidMagic for your proposals. Open or Add a new Product in the Product Manager. Then just click on MEGASPECS to pull down complete product specs and images. If BidMagic's Product Library has pricing information for the selected product, then users can choose to Users are strictly prohibited from sharing or posting this product data on the web.



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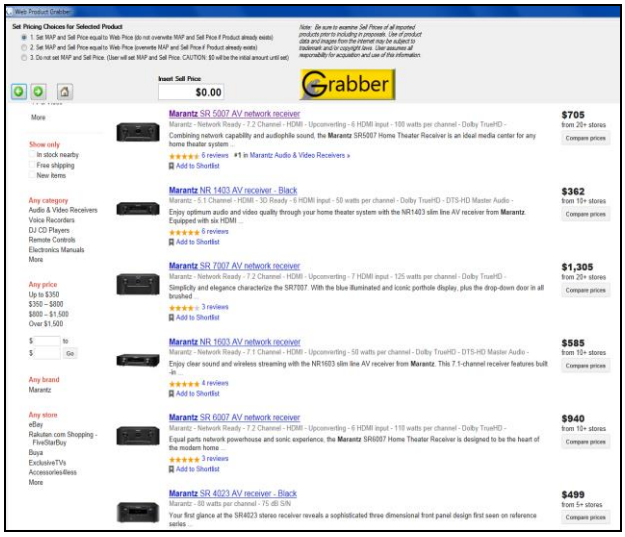
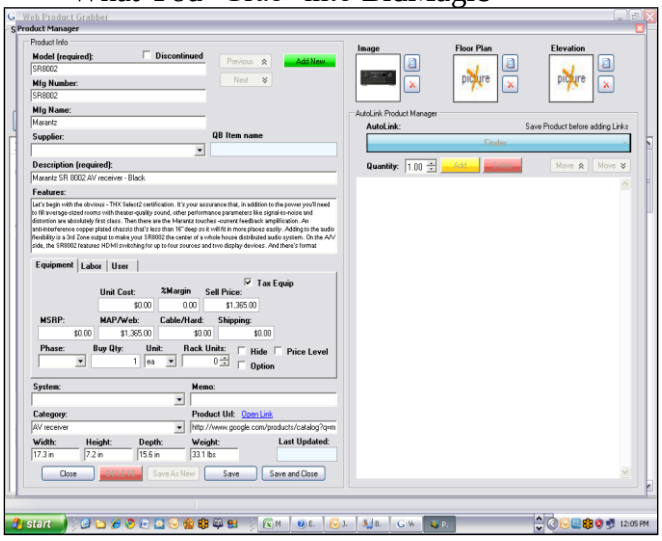
Web Product Grabber (Included with Online Product Search Tools Subscription)
Do you need to find products in a flash to add to your Product Tables? Our new Web Product Grabber might have just what you are looking for. Click on the Menu for Online Products/Web Product Grabber. This opens a web Product Search right inside BidMagic. Search for the Product you want. You will be able to perform powerful searches, compare prices, see tech specs, similar products and more.

Select the Product you are interested in, then insert the Sell Price you wish to assign. The Grabber button will turn green when it is ready to capture this product information for you. With one click you will capture all of the Product data that you need including descriptions, specifications, images and precise dimensions. Wow, that way easy!

What You See in the Web Grabber



What You 'Grab' into BidMagic



Because the architecture of webpages is not consistent, the Grabber does not work for products available from just one website. Look for products that are available from at least 2 stores for success. In some cases the Grabber can capture all of the information displayed on the current page but no more. If you choose to click on a choice to search beyond the Product Search, you will be asked if you wish to leave the Grabber Search area and navigate to other web pages.

AViQ Grabber (Included with Online Product Search Tools Subscription)
This is the top list of commercial AV products and is kept up to date by the leading manufacturers. Search here and use the Grabber to download the product info you need. Additional product data may be available if you login to your AViQ account.

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Import AVAD PriceBook (Included with Online Product Search Tools Subscription)
Do you want real time product info including your dealer cost? AVAD dealers can login to AVAD's website and pull the latest products and pricing right into BidMagic.
Go to the AVAD website then click dealer login
Click on Print Price Book
Select the Products you want to import. Limit your selection for faster results.
Click Make Price Book, choose XML file, export, save to desktop
Open BidMagic and click Import/Export, Import Other Suppliers, Import AVAD Price Book. Then select file to import.

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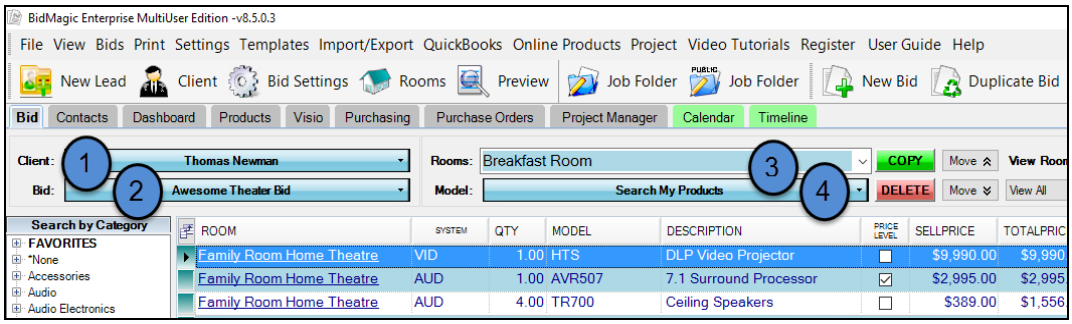
CREATING PROPOSALS ON THE BID PAGE – 4 STEPS

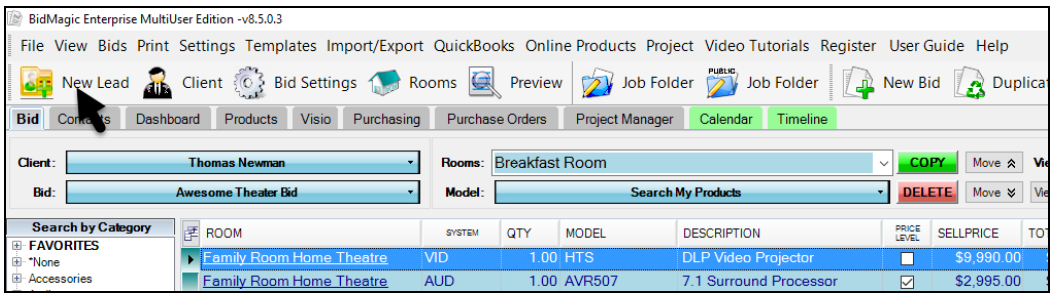
4 Steps to Creating a Bid

The top section of the Bid page has 4 blue bars, representing the 4 steps needed to create a Bid. Each of these 4 blue bars must be filled in with a selection before you can add to a Bid.



Step 1. Create a New Lead or Select an Existing Client

The first step to create a Bid is to create a new Lead or select an existing Client. Leads are contacts that do not yet have a Bid or Service call associated with them. Click on the New Lead Icon to create a new Lead.



Enter a unique name along with contact info in the boxes provided. A dialog box will appear for you to enter full contact info for this client. You can Save this Lead, or Click the New Bid icon to create a new bid and convert the Lead to a Client.

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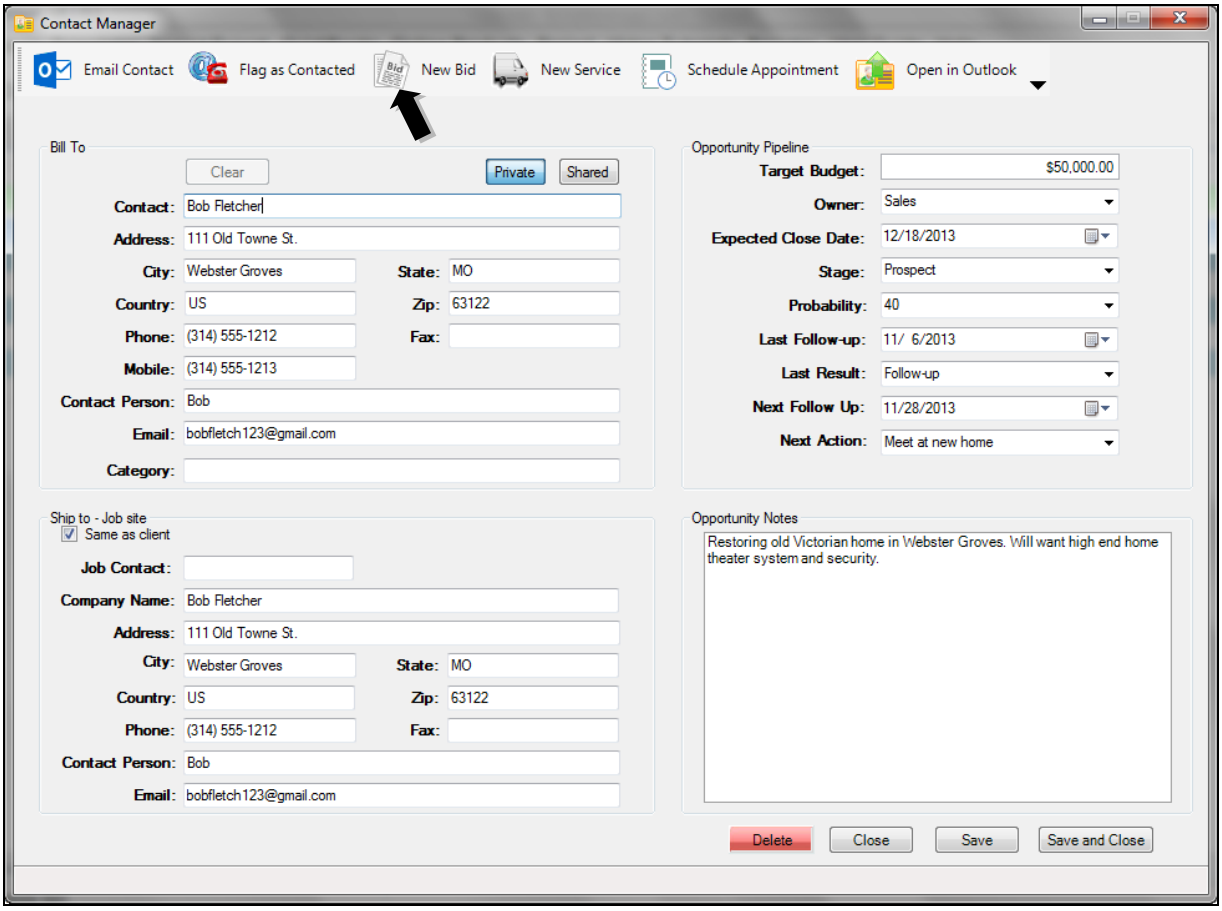
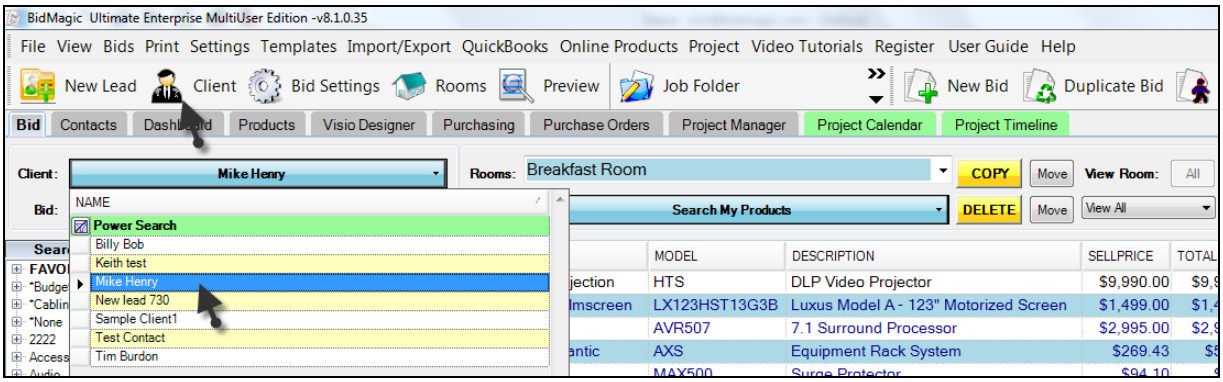


To select an existing Client, click on the Client Icon or the Blue Client Bar to select a client from the dropdown box.



Step 2. Create a New Bid

Click the New Bid icon to begin. You may also select and existing client in the Client Box and then select Add New Bid from the dropdown Bid box shown here. The New Bid form allows you to setup price and taxing choices, enter Jobsite/Ship to information, directions, target budget, notes and more. Pro version users have additional options to Set Pricing levels. They also can organize by both rooms and systems. Enterprise Users can also select Asset Tracking or Assign a Campus (Note: these choices cannot be changed later). Add a Description of Work and notes if you want them to appear on installer copies and on mobile devices (optional) Note: Create a New Service Call is similar to creating a Bid, but is designed to be tracked as a Service Call and does not need to be marked sold.

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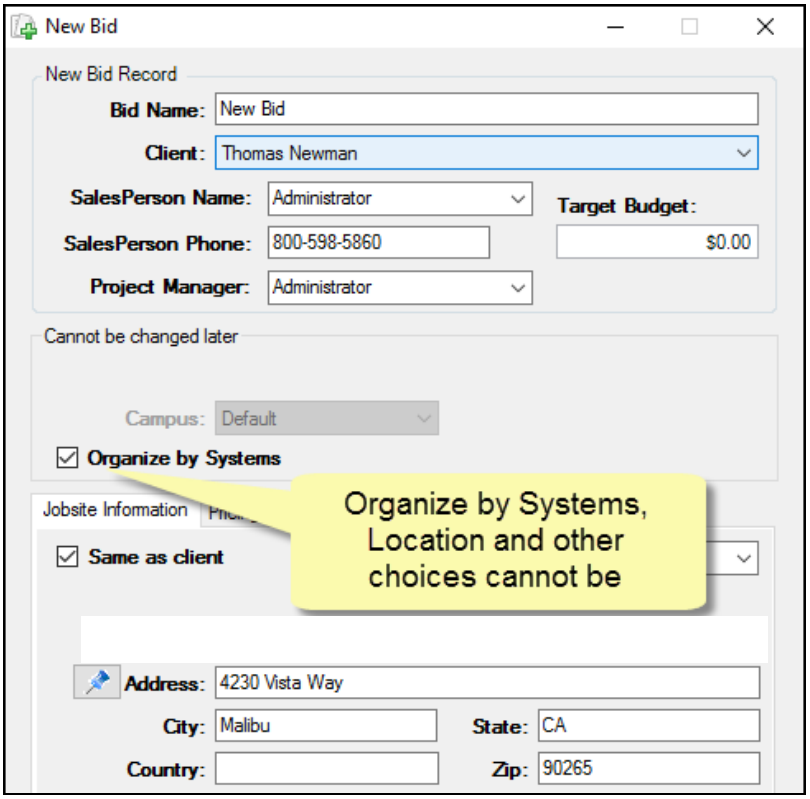
Enter a unique name for the proposal. This could be Jones Residence, or Robert Jones rev. 092205 or any unique job name. Do not include unusual symbols in the name like ~}/ % etc. Each new bid will create a Bid Number that can be searched and printed on reports. Click on Bid Name or Bid No. to sort on the desired column. Bid Names can be changed in Bid Settings.



Bid Settings

Once the Bid has been created, you can view and edit any information associated with that Bid. The Sales Pipeline info is stored on the tab by that name. Changes made here only affect this Bid.

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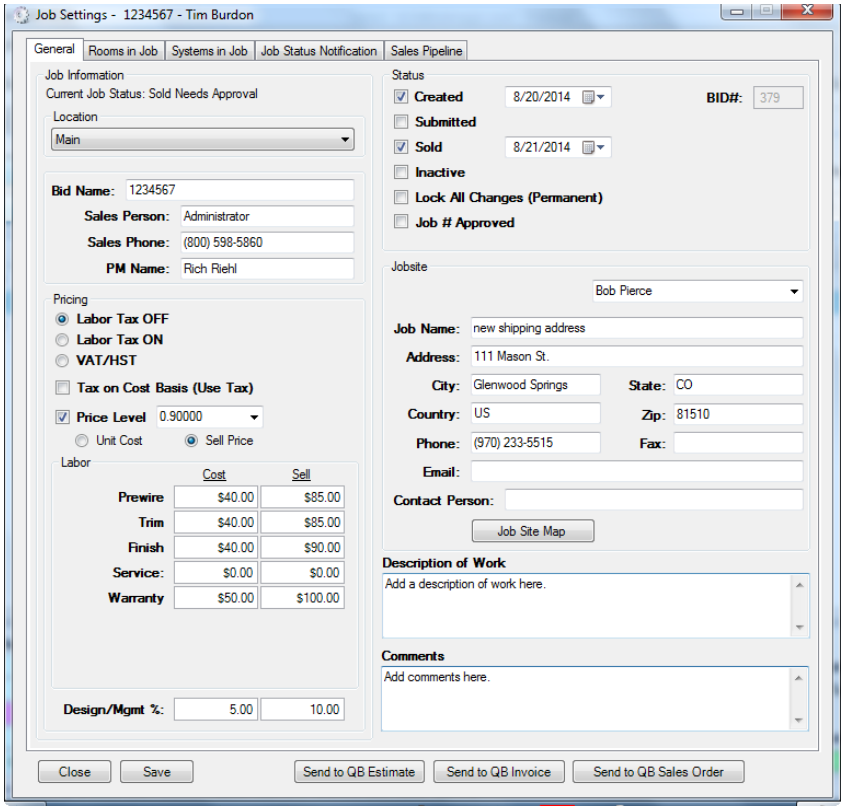

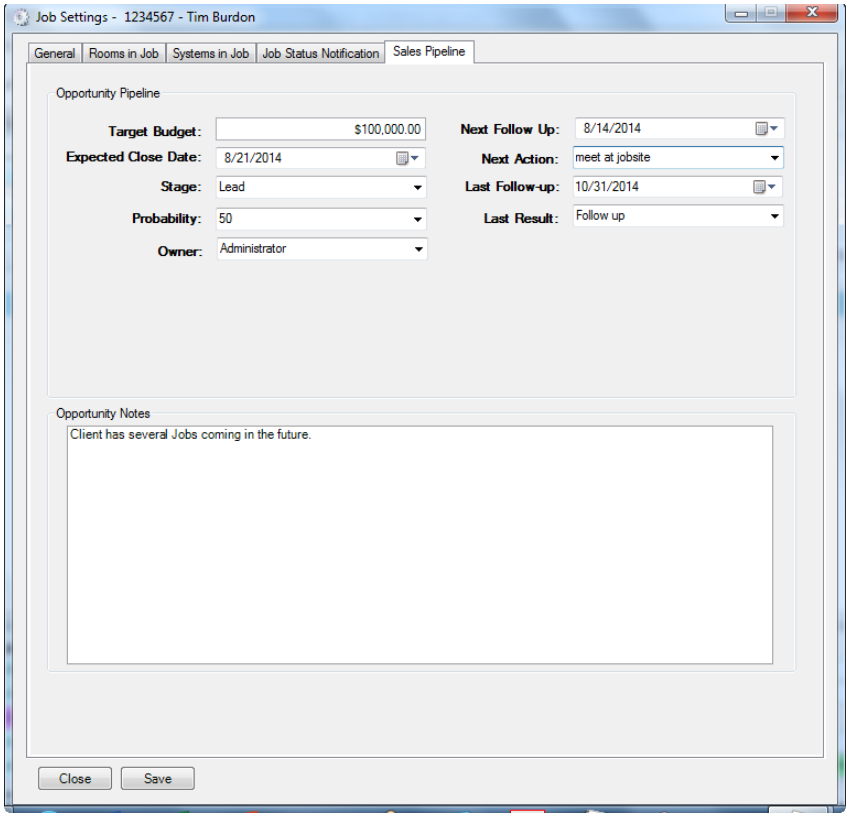

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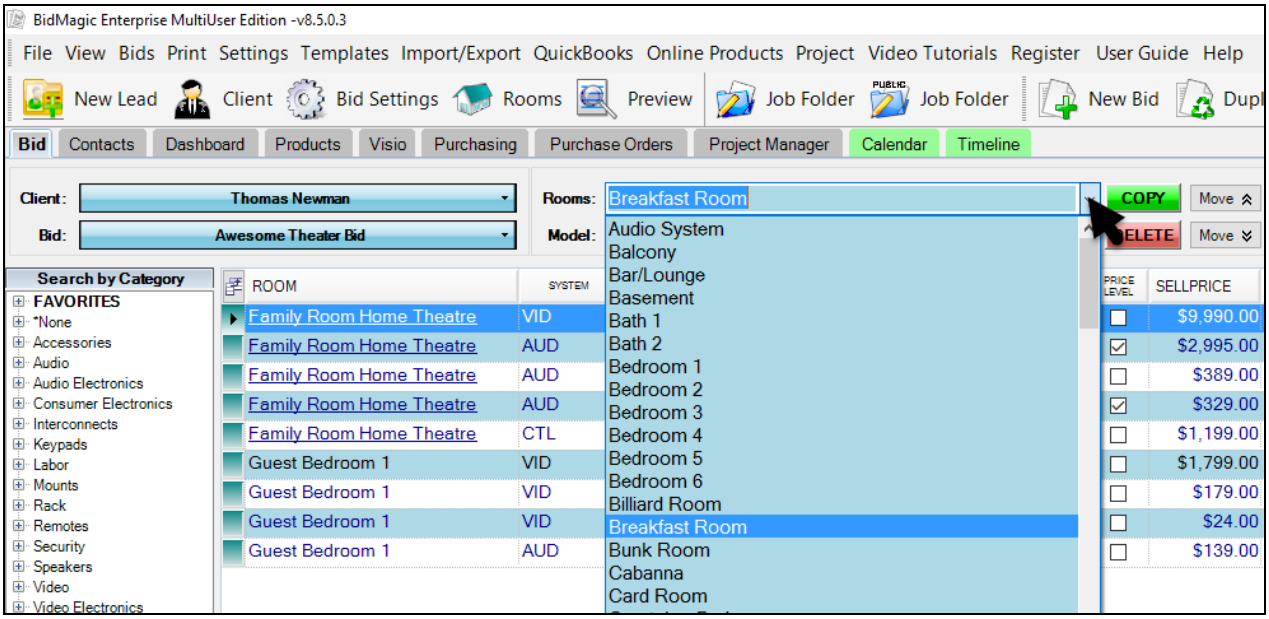
Step 3. Select a Room, Area or System (Section Header)
Select a Room from the dropdown list or type in a new name to create a new room (or section) where you want to add a product. If you begin typing the current choices appear. Hit tab or enter when you have selected the room.



Tip: These are the subheadings in the proposal and could easily be used to identify a system name or other header instead of a room. For example: AV System, Security System, Telephone System, Labor, Additional Charges, Monthly Charges, Optional Charges, etc. This is not the same as assigning both Rooms and Systems directly to Products in the Pro Version.

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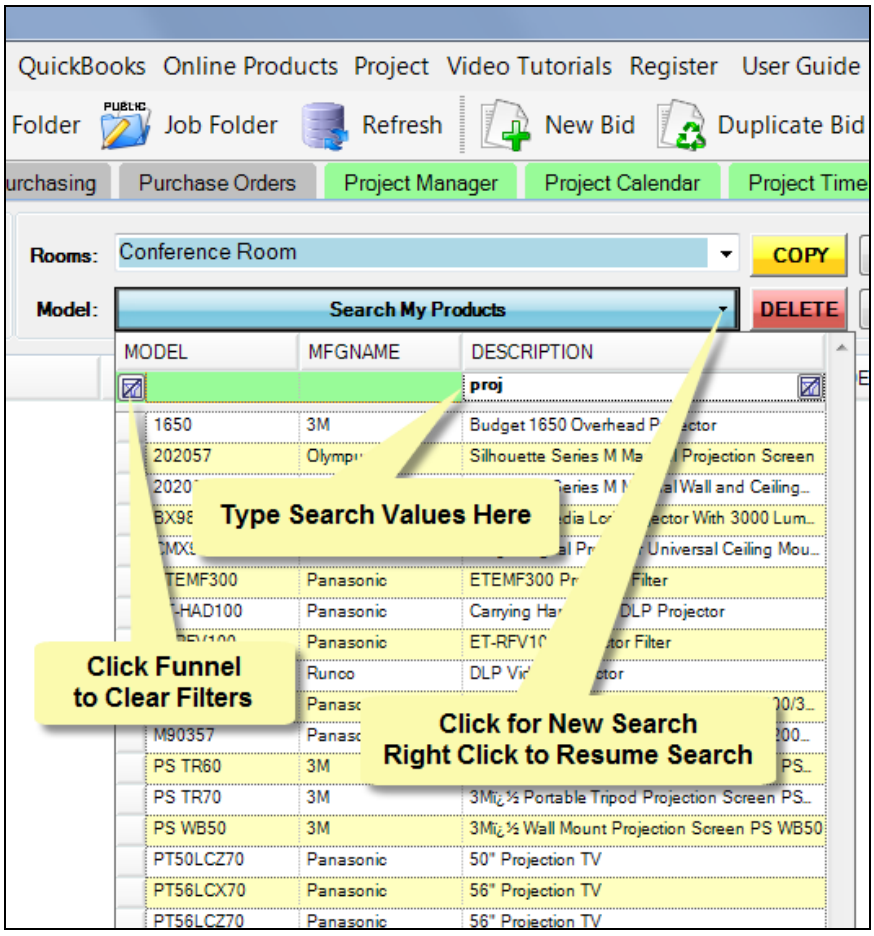
Step 4. Search Your Products

Select a Product by Model or Description in the Model Finder dropdown box. If you know the model number of the product, you can begin typing in the Search area under model or description and BidMagic will display the items matching your search. You can enter search values in any of the Power Search boxes. This will filter the results to quickly find products. For example, enter Cres in MFGName and only Crestron products will remain in the list. Small blue funnels indicate that the current search is filtered. Click on a blue funnel to end the filtering. Tip: Right Click to open Search My Products and recall the previous search results. This is very helpful when you want to easily locate several products in a related search. Standard Left Click starts a new search without recalling the filter settings.



To make selecting Products easy, the Product Preview windows appears when you click on a Product in the Finder or Category Finder.

The Category Finder allows users to visually search user defined categories, subcategories and manufacturer folders for the products in your database. This is helpful to locate a type of product when you do not know either the model number or description. Hold your mouse over the Product to see the Description. Click a Product to Select it.

Tip: You can keep the Product Preview window open by Right Clicking on Add or Target Add. You can position this window where you want it and select Products from the Category Finder or from Search My Products.

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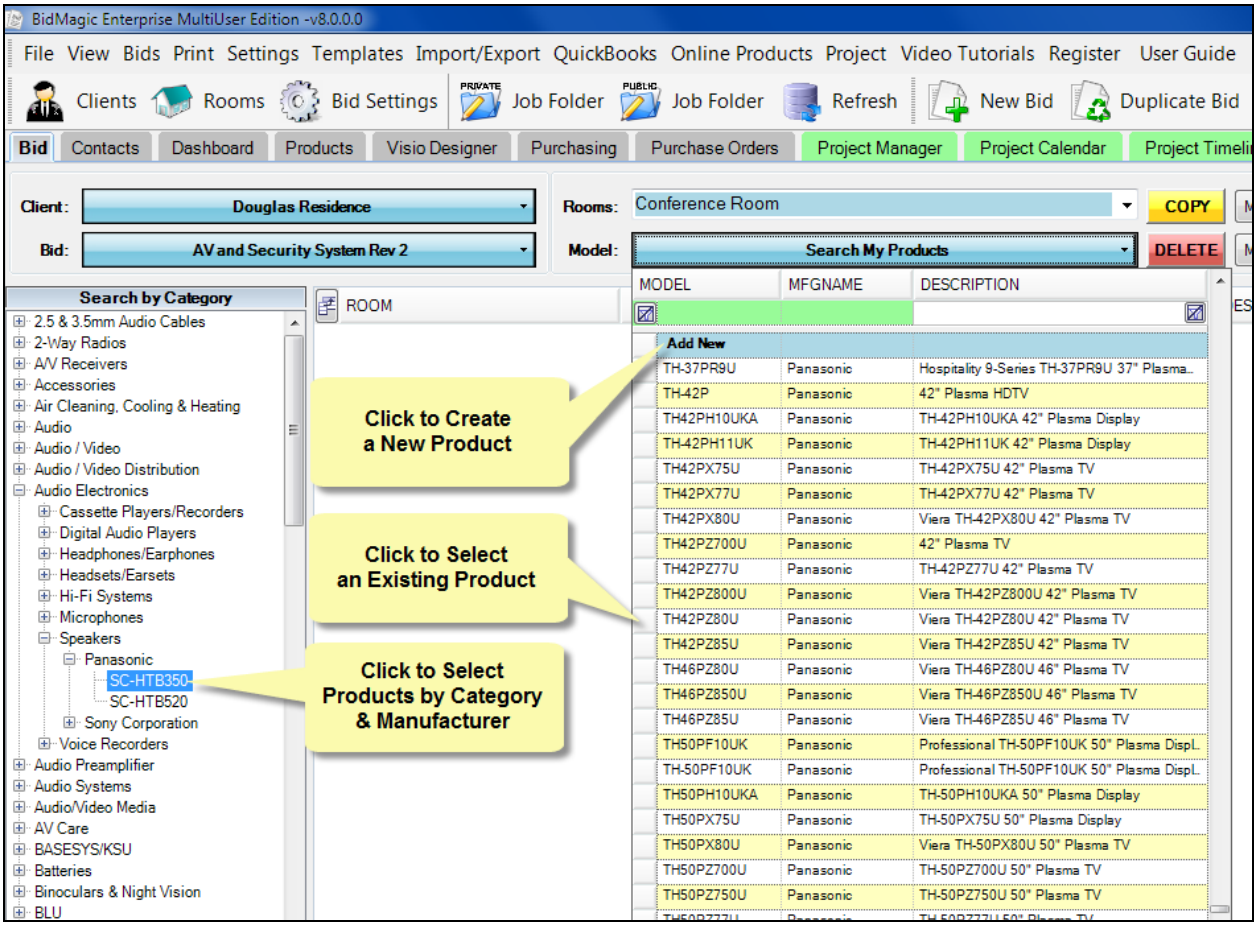

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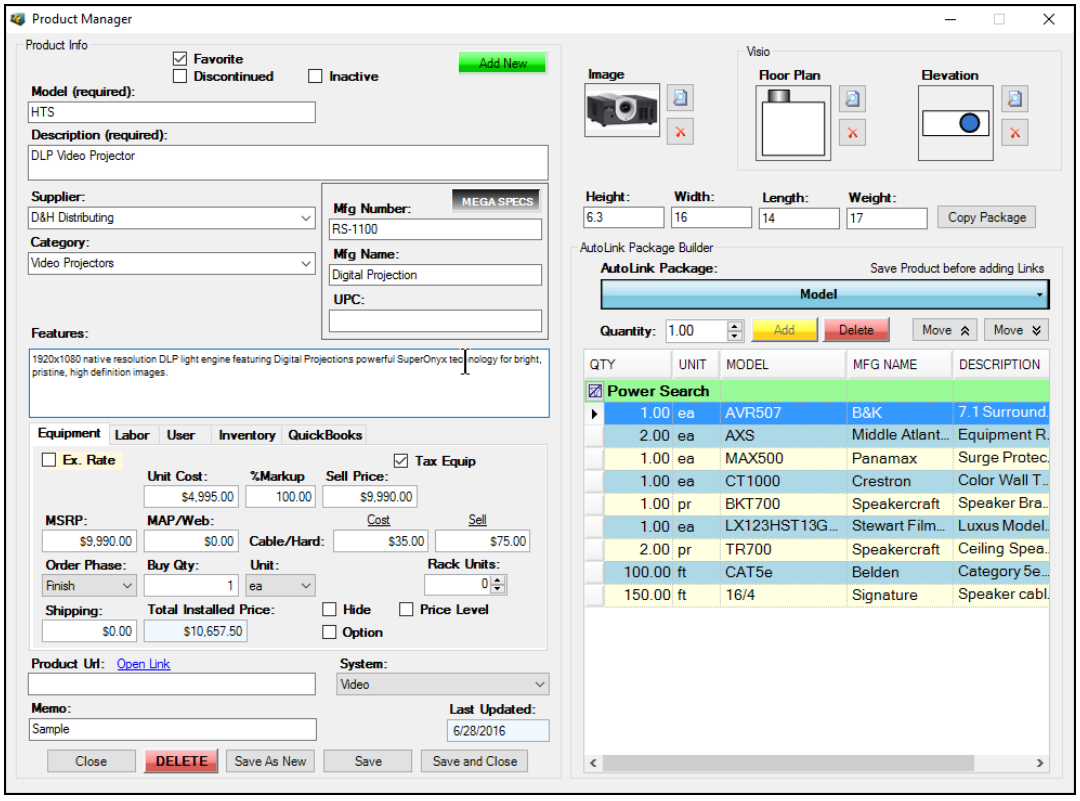
Preview and Edit a Product or a Package Before Adding to a Bid

After choosing a Product in the Model Finder dropdown box or Category Finder you will see the Product details open in the Add to Bid window. This lets you confirm your selection and pick a Quantity. If this productThe Bid Item Manager Preview Window can remain open for you to search additional Products in the Category Finder. You can select or edit Categories and Subcategories from this screen, which are automatically saved to the Master Product. This screen also and also allows you to edit the product prior to adding it to your proposal. You might want to edit the Sell Price, Labor charges, Description, System Assignment (Pro Feature) or more. You can choose to apply these changes to only that line item in the current bid or to all occurrences of that item in the Bid and you can even update the changes to the Master Product. (Admin only) The Product Manager Button opens all of the detail in the Product Table. Note: If you use this method to edit the Master Product and Save the changes, it will update all occurrences of this product in the current Bid.



Adding Products to a Room or Area (Bid Section)

Once you have selected the model number and the room, enter the quantity. The Add Box will turn green to show it is ready. If it is yellow, then you have not yet selected a Client, Bid, Room and Product to add. Click ADD item or hit F12 or enter to add the item(s) to the bottom of the selected room. If you are creating a Bid with System Organization turned ON, (Pro/Enterprise Versions) then BidMagic will automatically group the Products by System. The item(s) will appear in the proposal along with any linked products. Products that were automatically added by AutoLink Package will be highlighted in blue. Note: This Product information always pulls from the info currently in your Product Table. If you update that later, your existing Bids will not be changed.

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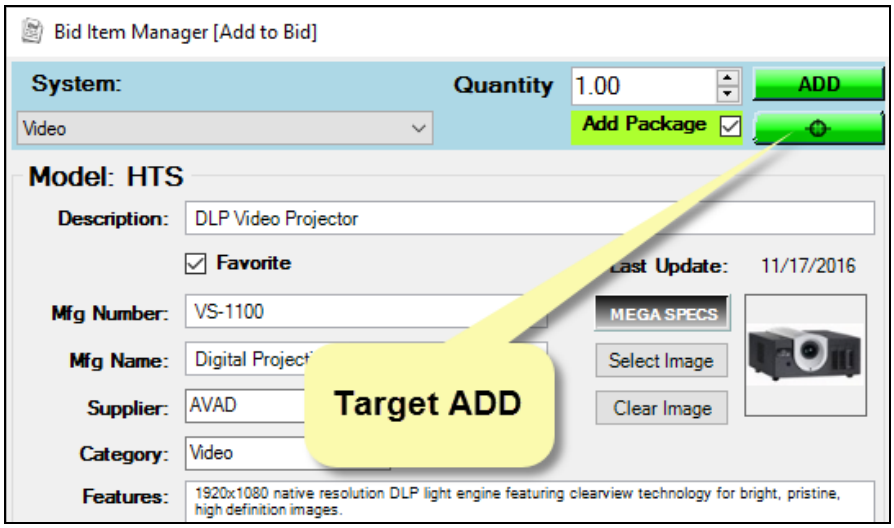
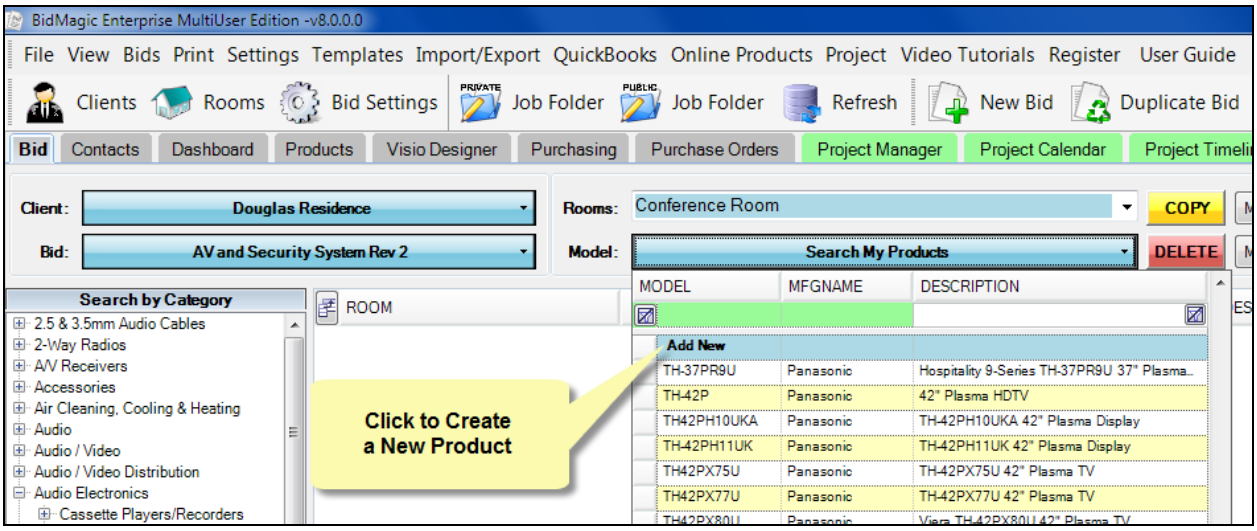
Adding Products to a Specific Line with the Target/Add Button

The bottom half of the Add Button allows you to target exactly where you add an item to a bid in progress. Select the green button to the left of the item position where you want to add the new item. Then click the Target/Add Button. This places the new item(s) directly below the selected line. Note, this will automatically add the new item to the room or area for the chosen position. You do not need to select the Room or Area from the dropdown box at the top. When adding items to an existing room, this is a great time saver. Note: Pro/Enterprise users: using Target Add with systems turned on may assign the system for the item based on the selected position in the Bid.



Quickly Create a New Product to Add to a Bid:

If the product you want to add to your proposal is not in your current list, you can click on the Products Tab and then click Add New there. However, there is a faster way to do this while working on a Bid. Under Search My Products, just click Add New to quickly create a new product.



To create the new product, enter a unique model number and a description. (these are required fields). Then fill in any additional product information, prices and labor you wish. Now you can instantly add it to the Bid and it will appear in the Products Table.

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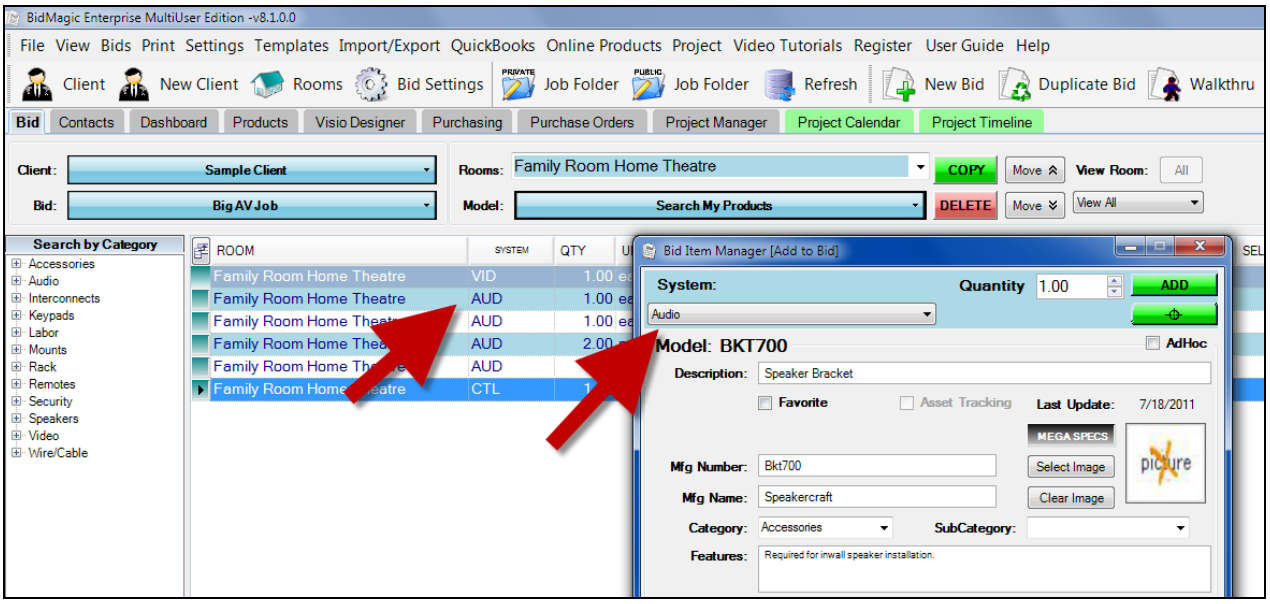
Assigning Products to Systems (Pro Feature)
Pro version users can now organize Bids into both Rooms and Systems. This second level of organization groups products by the systems in a room or area and can print System Totals at the bottom of the Client Copy. (Audio, Video, Security, Lighting, Control, Telephone, etc.) You can turn System Settings ON or OFF in your Default Settings and also when creating a new Bid.

Note: A Bid can be created with Systems On or OFF, but that setting can never be changed for that Bid. When Systems are ON, you **must** assign System designations to every product. Once you have selected the model you can view or change the System that this product is assigned to. If you attempt to add a Product that does not have a System assignment to a System Bid, BidMagic will assist you and will choose the System setting of the last Product added to the bid or prompt you to select a System assignment. These Systems will sort in the order you can manage in the System settings window found in Default Settings (global settings) or in Bid Settings (current bid settings). You can click on an item to change these settings in the Bid Item Manager window or right on the Bid Screen.



Copy or Move Existing Items in a Bid with the Copy Button
Click on the green button to the left of a line item in an existing bid (use CTL click or SHFT click to select more than one item) Select the Room (from the top blue bar) where you wish to Copy the selected items. Then click Copy. This makes it easy to put the same group of products in multiple rooms. It can also be used to move the products to a new Room. (Copy to a new Room first, then Delete the original items). In the example below clicking Copy would copy the Monster 400/1M (selected in the Master Bedroom) into the Pantry.

Touchscreen View
Because BidMagic can create proposals so quickly and easily we have added a touchscreen view for Windows 8 & 10 to make it convenient to build a proposal while visiting the site or when with a client. This can be done on a PC, or remotely with and iPad or other device connected with Parallels Access (in the Apple App Store.) For iPads, the screen design makes it easier to point and click to reduce the need for using keyboard operations. Click on the Touchscreen Icon to open it on your screen.

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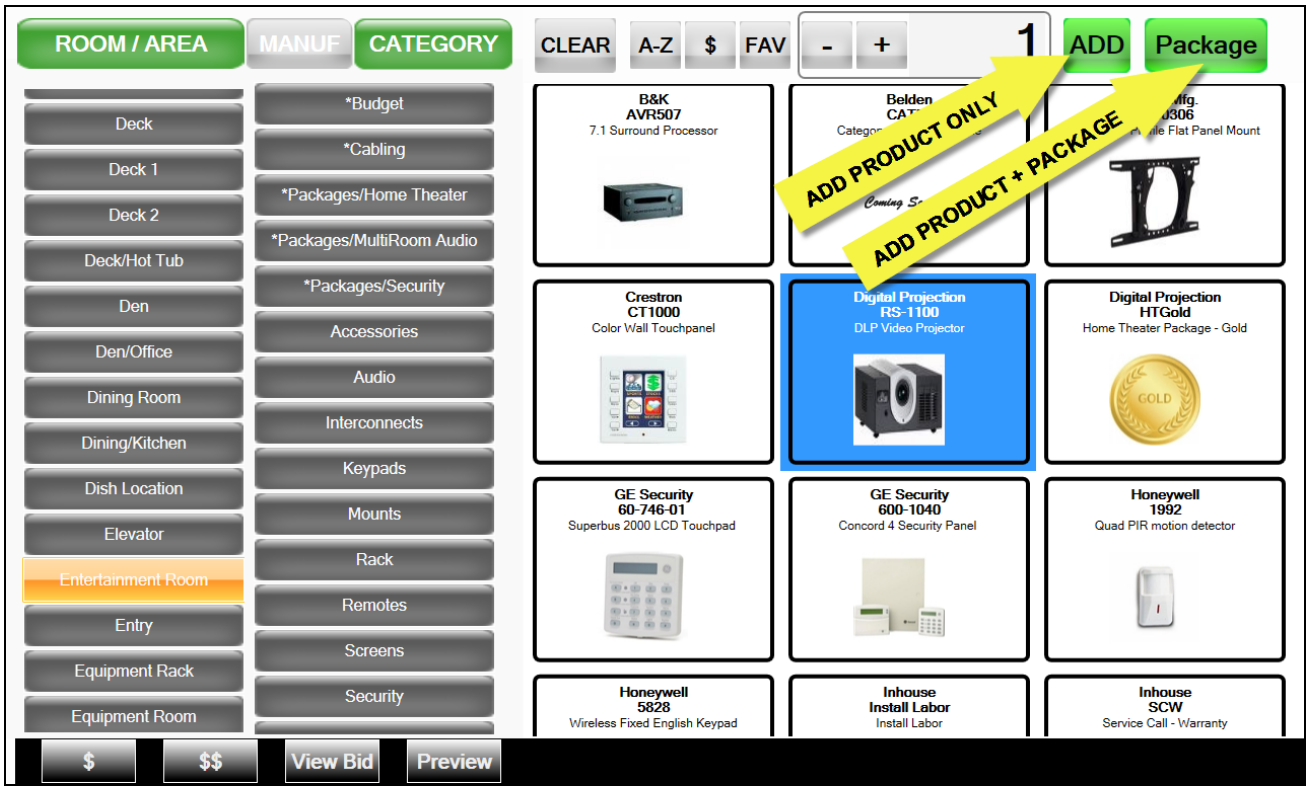
Touch Screen Bids
Open BidMagic and click on the Bid page and then on the Touchscreen Icon to switch to Touch Screen as shown below.



Step 1 - Touch or Click to Select the Room or Area to add to your Bid. Swipe with a finger to scroll.
Step 2 – Touch or Click the Top button Manuf or Category buttons to search products and packages.
Step 3 – Touch + or – to set the QTY desired. Touch Add to add the Product to your Bid. If a package is available for this product touch Package to add the Product Plus the Package to the Bid.

Touch or click Clear to remove filtering by Manufacturer and/or Category. Toggle A-Z to sort products ascending/descending. Toggle $ to sort by price ascending/descending. FAV filters your Favorite products. Clear removes the Manufacturer and Category filters. Note: Subcategories are not searchable on this form. If you create Categories like Audio/Amplifiers and Audio/Speakers. With both names imbedded into a single Category, you can search efficiently.

View Bid will show the traditional Bid screen where you can edit the bid and create new products if needed. Click on the Touch Screen Icon to navigate back to the Touch screen view. Preview opens the Bid in MS Word for previewing, editing, signature capture, printing, emailing, creating a PDF, etc. Bluetooth or remote printers may be setup to print copies of bids or other reports.

Click $ to show/hide product prices. Click $$ to show hide total price. Click View Bid to close this screen. The View Menu in BidMagic can also Show/Hide prices.

Hiding Line Items
Click this checkbox on any line item to hide the entire product in the Client Bid. Prices for hidden equipment will be added to the Cable/Hardware in the Bid Summary section. Cable/Hardware prices can also be included in Room/Area Subtotals in the Client Bid. Labor prices that appear in the Bid Summary are not affected by hiding them and can be an effective way of adding detailed labor to a

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section of a Bid while not showing these line items to the Client. This is not the same as the option in Print Preferences to hide line item prices. That option shows the products but hides the prices on each line. Hidden items will still appear on Purchase Orders and Field Copies.

Optional Items (Pro/Enterprise Feature)
Click this checkbox on any line item to make the product and associated labor optional. Note: Optional items are not included in any subtotal or total prices. Be sure to add a note explaining this is optional for the client. This feature can also be used for monthly charges like service contracts, alarm monitoring, etc. Although these may not be optional, this feature allows you to show these charges on a line item without them affecting the totals.

Assigning Price Levels (Pro/Enterprise Feature)
Click this checkbox on any line item to adjust the sell price by the selected factor. This will automatically update all item prices in the Bid. Checkboxes will appear to adjust this setting for each line item in the Bid. Levels can be applied to the Sell Price or to the Unit Cost for a Bid. This gives powerful flexibility to the pricing process. For example, if the normal sell price is $100.00, clicking Price Level will change this to $90.00 if the price level is 0.9. It would change it to $120.00 if the price level for this bid is 1.2. Apply 1.4 to a Product cost of $100 to achieve a $140.00 adjusted Sell Price. This allows consistent global margins for all Products in an entire bid.

Labor Difficulty Factor (Pro/Enterprise Feature)
You can set a labor difficulty factor, which adjusts the number of labor hours required. You can assign this adjustment to one or more labor phases.

Controlling the Sequence of Rooms and Products
In order to organize your proposal for the best presentation, you can easily change the order of the rooms or the order of the items from the order in which they were added to the proposal.

In BidMagic each item is assigned to a specific room (or area or system). These are just headers that create sections in the bid.

To move an item within a room: First select the box to the left of the product then click Move Up or Down buttons next to the Copy and Delete Buttons. You can also hold hit the Up or Down (arrow) keys on your keyboard or hold down the CTL key and drag the item to the new location in the room.

To move an entire room: Hold down the SHIFT key and select the first item in the room. Use the Move Up or Down buttons or keys. You can also hold down the CTL key to drag the room to a new location in the Bid.

To reassign an item to another room:
The right edge of the Room column in a Bid allow drops down to allow moving existing products to another room, area or system. This can also be done by right clicking on the line item in the Bid and changing the room assignment in the Bid Item Manager.

Room Description/Scope of Work (Pro/Enterprise Feature)
You can choose to add a description of a room/area/system/section with up to 1,000 characters. This can be added at the top or bottom of a room and typically clarifies the description of the equipment features or operations for the client that goes beyond a list of products. To add this right Click on the Room Name in a Bid or Click on the Room Icon. click on the Room Icon/Menu. You will see the Rooms that exist in the current bid. Click on a Room to add a description. You can choose from a list of favorite descriptions that you can easily recall and edit. After applying the description, the Room

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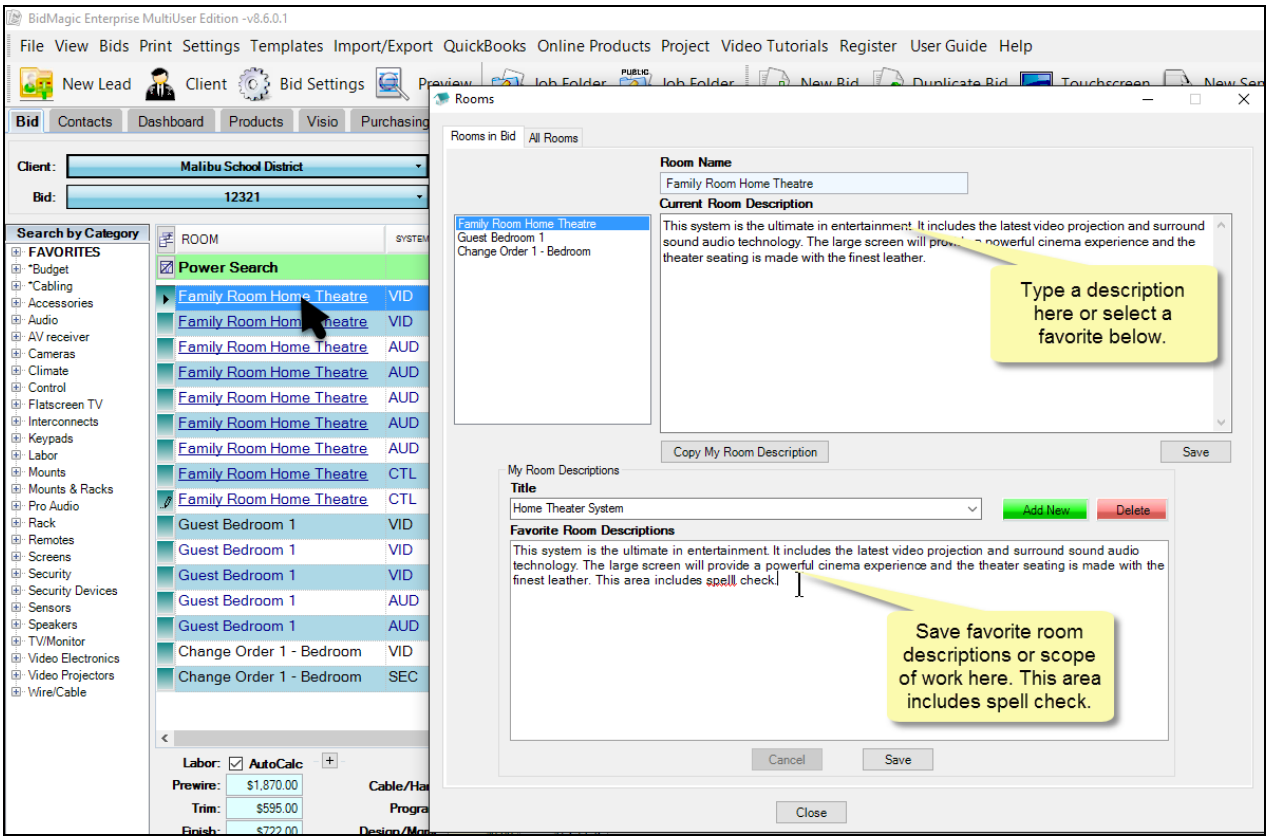
name will be underlined for those Bid Line Items. Note: The Favorite Descriptions include automatic spell checking.



Changing and Deleting Bid Line Items

You may make direct changes in line items within a proposal except for Model number and Total Price. To delete item(s) click on the gray, green box to the left of the line item(s) to select. Holding down the SHIFT key allows multiple selections. Then hit the Delete button (upper right on screen) or the Delete key on the keyboard. You can also delete a line item by right clicking on the item (which opens the Bid Line Item Manager) then Click Delete. Deleting a line item cannot be undone.

Right Clicking on any line item in the Bid opens the powerful Bid Item Manager window. In this window, you can edit the Product Description, Prices, Labor, etc. Click on the Blue Finder Bar at the top of this window to select a different Product for this line. If you check 'Apply to all Occurrences in this Bid' it will apply your changes or replace **every** entry of this item in the Bid. This is a powerful feature.

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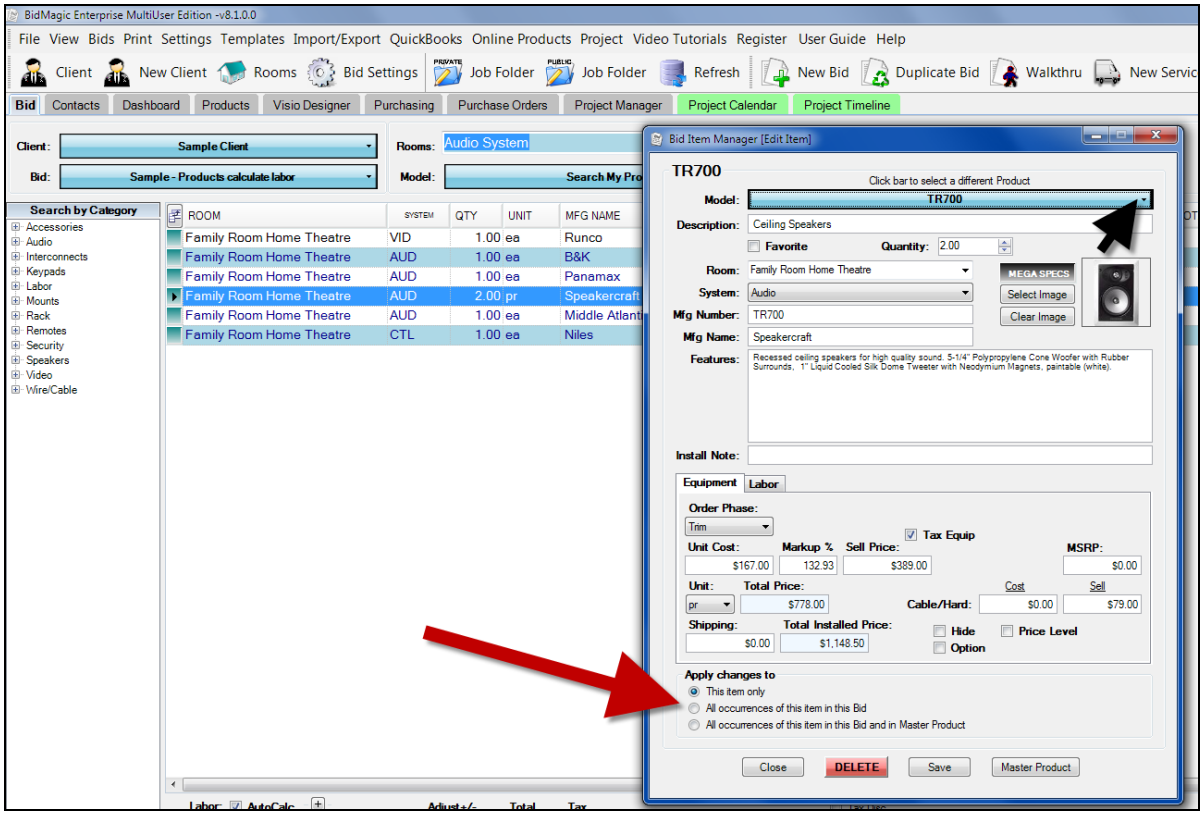

You can also make edits to the price, description, labor, etc. By default, these changes ONLY apply to the selected line item in this Bid and not change the values in the Product Tables. This provides powerful customization. Use the full length features description to add special details for this item in the Bid. If you are an administrator, you have the option to apply changes to both Bid Item and the Master Product at the same time.

Click on Master Product to open the full product detail and make changes there. Note: changes made to a Master Product do not make changes to any bids.

Adding Notes just for your Installers

You can include up to 250 characters of notes just for your installers. These notes appear only in the Installation copy of the bid and not in the client copy.

View Rooms

The View Rooms dropdown box shows a list of the rooms in the current Proposal. Click on a room to view only the contents of that room. Click View All to return to seeing all rooms in the entire Proposal. In large proposals, this filter feature is very helpful. When you choose to view a single room, Room Totals will appear and new products will automatically be added there. It makes it easy to view and edit the products in a single room or system and minimizes the need for scrolling.

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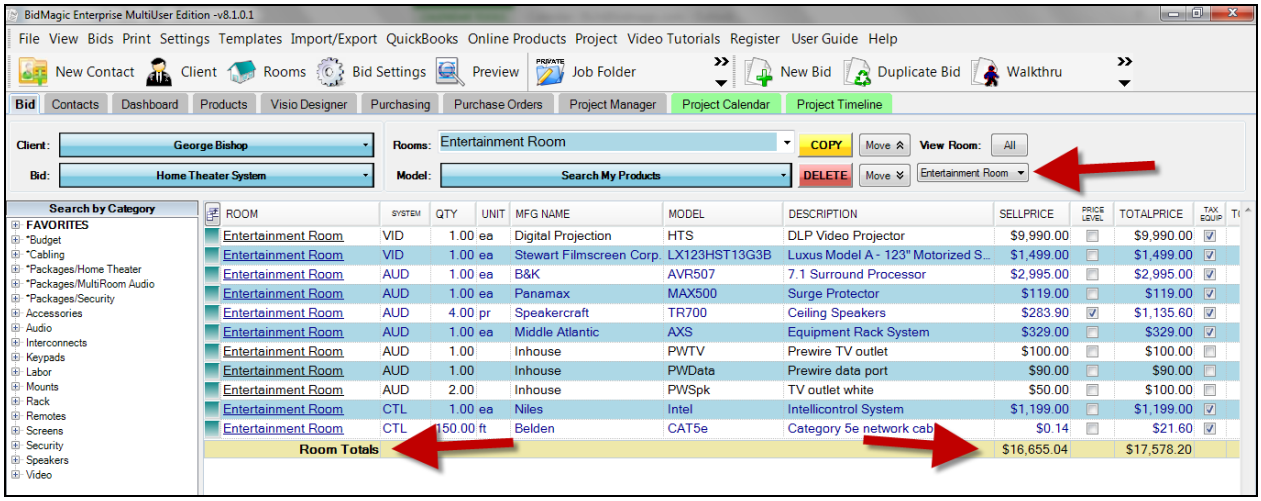
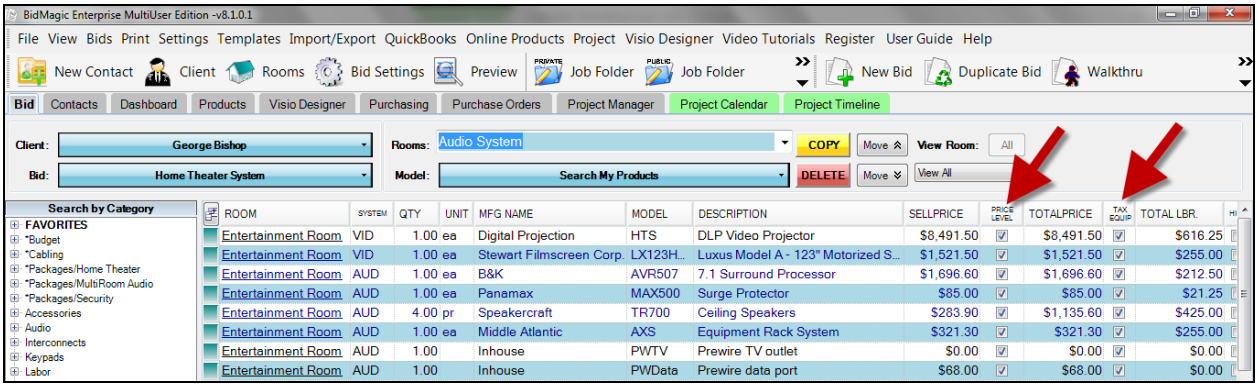


Select All/ Deselect All for Price Levels and Tax Check Boxes

Double Click on Column Headers to Select All or Deselect All for Price Levels or Tax Columns with Checkboxes. These are very handy shortcuts for global pricing and tax choices.



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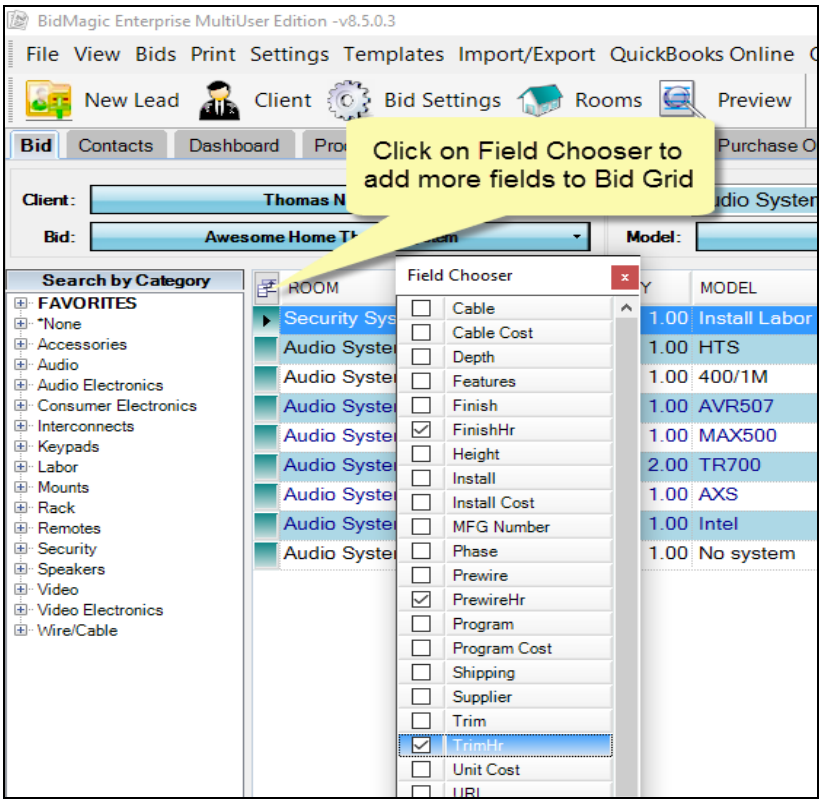
Customizing the Bid Screen

Click on the Field Chooser button to open a list of additional data fields that can be displayed on the Bid Page. Check a box to add it to the Bid grid. Set the column order by dragging the column headers to the desired order. Your choices will be saved.



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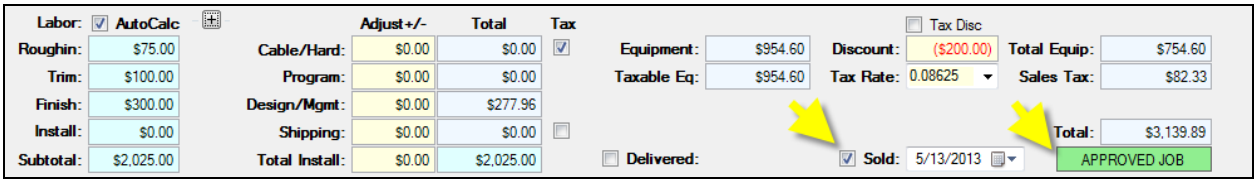
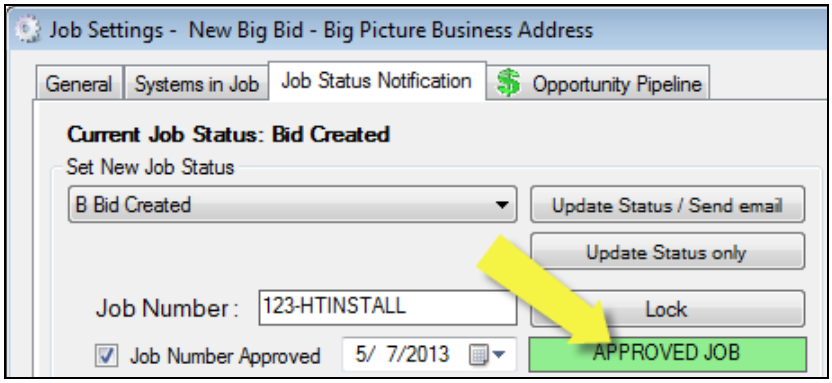
TURNING A BID INTO A JOB (WITH OR WITHOUT APPROVAL)

If a Bid is marked as sold and Job Number Approved, it then becomes a Job. This is an important step to manage the process of ordering products, managing installation and the tasks that occur after the sale. When a Bid is marked Sold, the expected close date will be set to the sold date and the probability will be set to 100%. The Dashboard can organize and provide filtered views of Jobs, Bids, Service Calls and Inactive Bids and search quickly through all of the Bids and Clients you have in BidMagic.



Enterprise users have an option to require approval when turning a bid into a job. If that option is turned on, users must also check the box to approve Job Number to complete the process of converting a Bid into a Job. Note: Users with permission can set a job number even before the job is sold or approved if desired. See Enterprise Features later in this guide.



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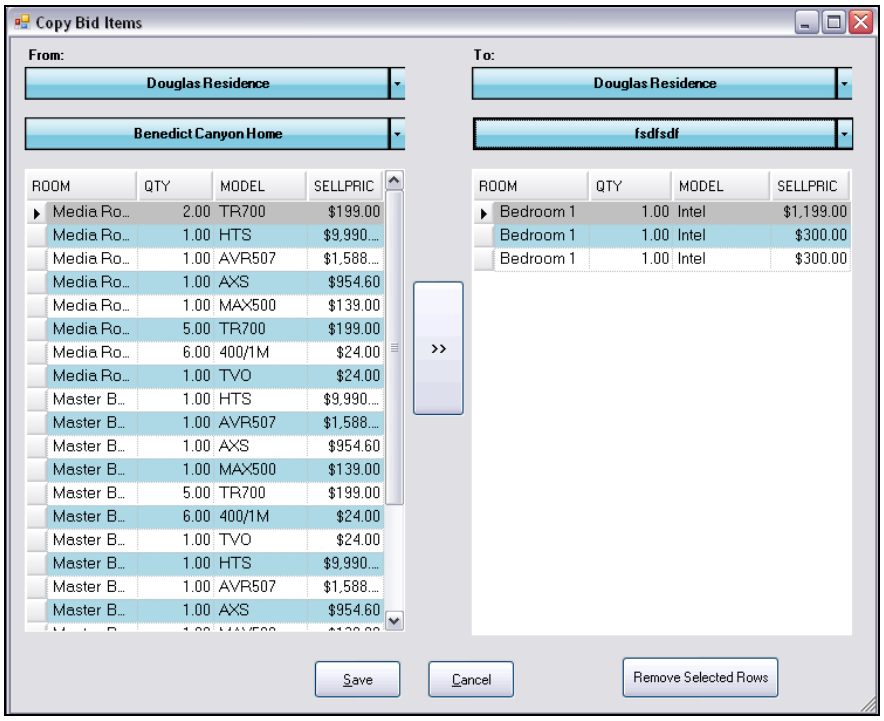
Copy Bid Items (from one Bid to another Bid)

This allows copying items from one bid to another. This is located under Bid Menu. Select products from an existing bid and copy them into another bid. Select entire rooms or systems to copy from one proposal into another. Simply choose the Bid you want to copy from on the left and the Bid you want to copy to on the right. Select the line or lines (SHFT click or CTRL click to select multiple lines) then click the >> button to copy the line items to the other bid. There are some limitations in copying to and from Bids with different System settings. (Pro Version)



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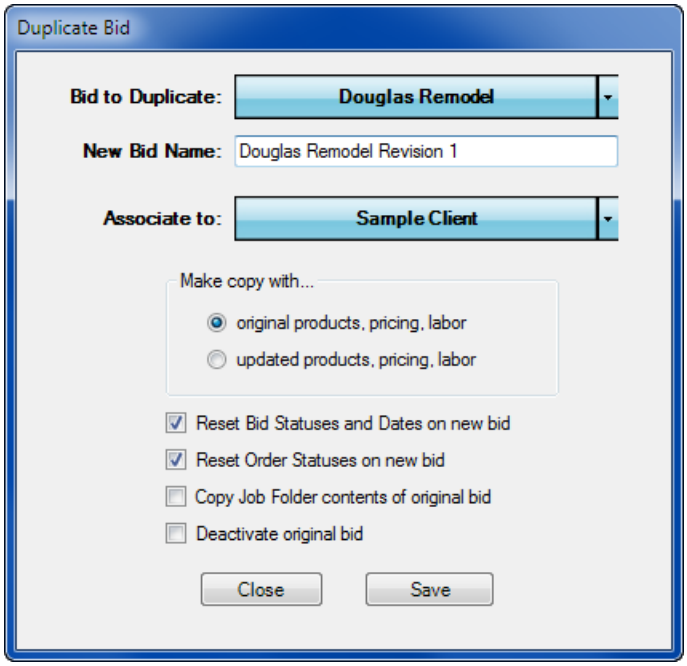
DUPLICATING & REVISING PROPOSALS

BidMagic makes it easy to create several versions of your proposals. After finishing a proposal, we highly recommend printing a hard copy for your client files. BidMagic will also store a copy in the Job Folder for you. Click on the top Menu item, Duplicate Bid. Select the proposal name to create a new cloned copy of the proposal which you should rename and then revise. Your original proposal will remain unchanged. You may want to incorporate the date of the revision or a revision number into the Bid name. You might want to create a special client named 'My Favorites' where you can store system designs to easily duplicate and revise again and again.

There are several scenarios where you would want to create a Duplicate Proposal.Sometimes you may need to update an old proposal after it has been presented to the client. If you have changed product numbers, pricing, labor etc. in your product table since that time always print out a Client copy first for your records. Then make a duplicate copy of the Proposal. Then make changes to the duplicate.

Making a line item change to an old proposal should be done on a duplicate – not the original, especially if you have already delivered a copy to your client. If a model number no longer exists in your Product table, then updating that line item will force you to choose a new model that is currently listed.



Copy Bid using Original Prices

You have the option of duplicating the proposal exactly as it was written. This uses all of the original products, prices and labor, even if the products no longer exist in your products page or if the prices or labor in the products table has been updated. Your existing bids are protected from unwanted changes whenever you update the product table.

Copy Bid using Current Updated Prices

You also have the option to duplicate the proposal and update it with current pricing. This is very important to ensure the latest prices when creating duplicates of template system designs. In this case, all products will be included with the current prices for equipment and labor. Any edits made within the Bid Item Manager will be updated to current values.

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Product(s) that were in the original proposal that have since been deleted from your product table will display a warning in red: PRODUCT DELETED! This shows the original products so that you can replace these with current models for current use.

Here is a power tip. Let's say you created a large proposal and you want to change all of the labor rates in the entire proposal. Instead of reentering each line item, just update your labor rates in Bid Settings. This will re-price the labor for every line item automatically.

Note: When you delete products in the Products table, they will not change your existing bids. Old proposals will always open with the prices effective at the time of their creation.

Reset Order Statuses on New Bid
After a Job is marked Sold, users can Order Products. If you create a Duplicate Bid, you can choose to keep the current Order Status in the revision if the job is in progress. If your goal is to create a new Bid you can reset the order status to start fresh.

Copy BidMagic Docs Folder Contents
BidMagic stores copies of Proposals, Purchase Orders and more in a Job Folder for easy access. When you revise a Bid, we recommend checking this box so that the new BidMagic Docs folder created with the revision will retain these important documents.

DeActivate Original Bid
To help organize and locate your bids, you can set a Bid to Inactive Status in Bid Settings. This is useful if you create multiple Bid revisions and want to clearly separate the current active bid from prior revisions. This is also helpful to store Bids that are not won in their own section to help focus on Bids that are current and active. Inactive Bids can still be located with the Inactive Status filter setting in the Dashboard when needed. In a rare situation when you wish to reactivate a Bid, locate it in the Dashboard under the Inactive Filter, Right click on the bid and select Bid Settings, then uncheck the Inactive checkbox and Save. The Bid will be reset to Active.

CHANGE ORDERS

Revising a Bid is easy in BidMagic. However, after a sale is made BidMagic also can help you manage change orders in four ways. Each method has pros and cons based on the type of change desired.

Note: when adding items to a proposal, only positive quantities show in the QTY selection scroll box. To add a negative number of products, type the negative quantity directly in the QTY. By entering this way it protects against inputting negative numbers by mistake. QTY can also be made negative in the Bid line item with a direct entry or right clicking to open the Bid Item Manager. To remove a sold item in a change order enter a negative QTY but do **not** enter a negative sell price.

Create a New Stand Alone Change Order
Create a new Bid for the Client and Name it Bid Name Change Order 1. Then add new items in the normal way, and remove items by typing in a negative QTY when adding them. This is a preferred solution when billing, ordering or job labor is already in progress. This creates a new Change Order that can be sent to accounting, ordering and installation.

Revise an Existing Bid with the Changes
Open the Approved Bid and create a new room named Change Order 1. Then add your new products in this room at the bottom of the Bid with a positive QTY and remove products with a negative QTY.

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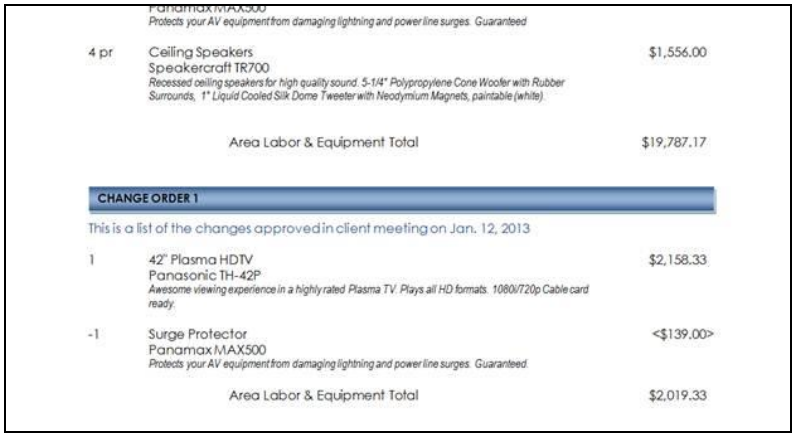
If you have additional changes, create a new Room named Change Order 2. This method is great because it retains the approved bid, summarizes all changes and updates the totals in the Bid summary. If you show Room totals, the total for the changes will show nicely. This consolidates all changes into a single document that minimizes confusion that can occur when separate change orders must be reconciled for accounting, ordering and installation. This method will also provide the correct combined quantities for purchasing. This method works well to replace any invoices or purchase orders that have been created.



Panamax MAX500
Protects your AV equipment from damaging lightning and power line surges. Guaranteed

4 pr	Ceiling Speakers Speakercraft TR700 *Recessed ceiling speakers for high quality sound. 5-1/4" Polypropylene Cone Woofer with Rubber Surrounds, 1" Liquid Cooled Silk Dome Tweeter with Neodymium Magnets, paintable (white)*	$1,556.00
	Area Labor & Equipment Total	$19,787.17

CHANGE ORDER 1

This is a list of the changes approved in client meeting on Jan. 12, 2013

1	42" Plasma HDTV Panasonic TH-42P *Awesome viewing experience in a highly rated Plasma TV. Plays all HD formats. 1080i/720p Cable card ready.*	$2,158.33
-1	Surge Protector Panamax MAX500 *Protects your AV equipment from damaging lightning and power line surges. Guaranteed.*	<$139.00>
	Area Labor & Equipment Total	$2,019.33

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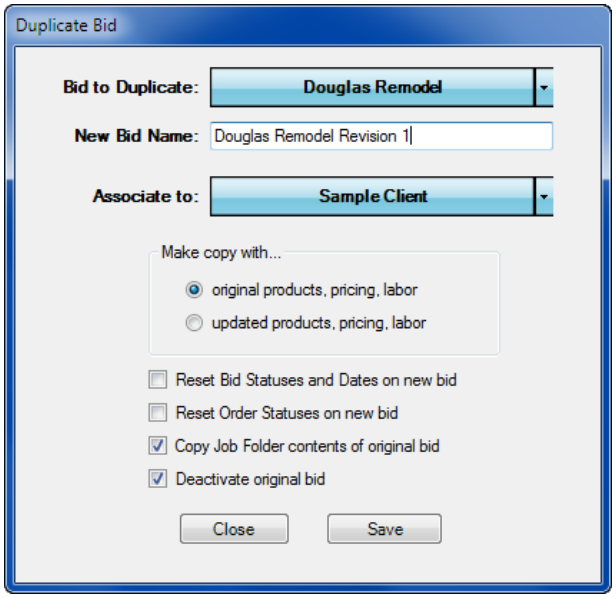
Create a New Revision of the Bid with the Changes
This is a variation of changing the original bid which keeps the original intact. Click the Duplicate Bid Icon and choose "make copy with original products, pricing, labor." Since purchasing and Job Status are already in progress, do not reset the Bid and Order Statuses. Check Copy Job Folder Contents of original bid and Deactivate original bid. These choices are recommended when you desire to replace an original bid and retain all Job Statuses and related documents. Adding a room named Change Order 1 is recommended.



Create New Change Orders Plus Merge All Changes into a Single Bid
Here is a tip for those who want the very best in Change Order management.

Step 1. Create a new Bid with Bid Name/Change Order 1 as explained above, with Change Order 1 at the Room Name.

Step 2. Click on the Bid Menu/Copy Bid Items. Select Copy From the Change Order (as shown on left) and Copy To the Original Bid (as shown on the right). Use Shift/Click or CTL/Click to select/ highlight all of the items on the left. Then click the >> button to copy the all of the contents of the Change Order into the Original Bid.

Now you will have separate Change Orders PLUS an up to date revised copy incorporating all changes into a single current document! The combined bid is perfect for installation and ordering.

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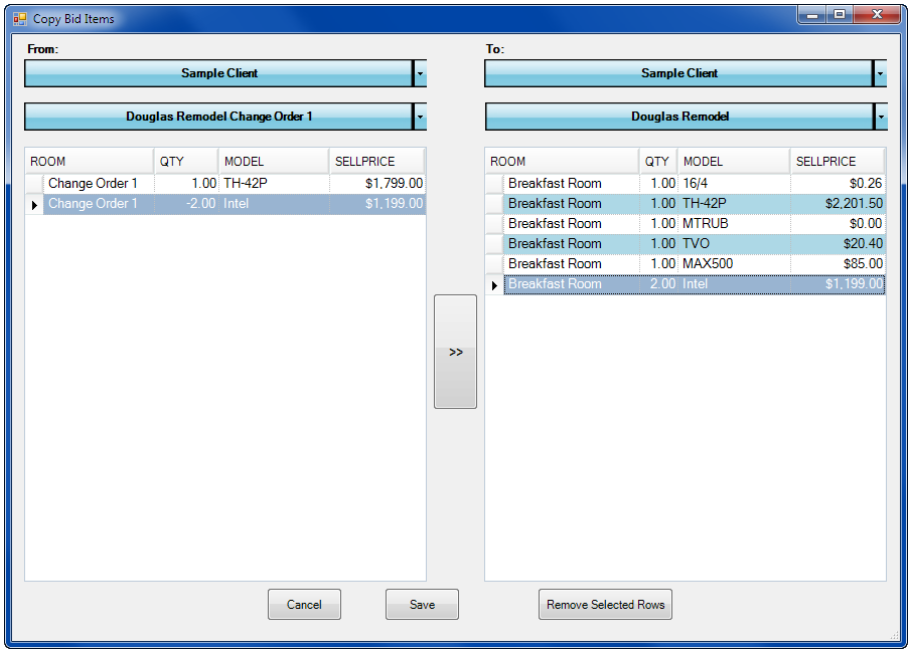

Equipment Sales Tax
Most states charge sales tax on equipment only. This is easily done by selecting the sales tax rate in the yellow box. You can select an existing rate (created in Settings/Tax Table) or type in any rate desired.

Optional Labor Tax
The program is shipped with a default of no tax for labor. Some states require sales tax on labor also. To turn this feature on, check the checkbox “Labor Tax” in the defaults. This adds additional sales tax checkboxes in the summary section to select functions where you sell installation items that are taxed. Check or uncheck these for each applicable job.

Optional Use Tax (Based on Cost)
Some states charge separate Use (Usage) tax based on the cost of a product rather than the selling price. This does not mean you want to ‘use’ the tax feature and in most states, you should set this choice to OFF. In the Default Settings or Bid Settings Menu click Activate Tax Basis to turn this feature on. You will see additional choices in the Product and Bid Pages. Check Tax Sell Price to charge tax for the full retail sales amount. Uncheck this box to calculate sales tax based on the Cost you have listed in the Products Table. BidMagic colors the SellPrice or UnitCost green to indicate your choice of which you normally tax in the Product Manager.

Optional GST (HST) or VAT Tax
Canada and other countries charge tax on both equipment and labor, known as VAT, GST or HST. To turn this feature on, check the checkbox “GST” in the defaults. This adds additional sales tax checkboxes in the summary section to select functions where you sell installation items that are taxed. Check or uncheck these for each applicable job.

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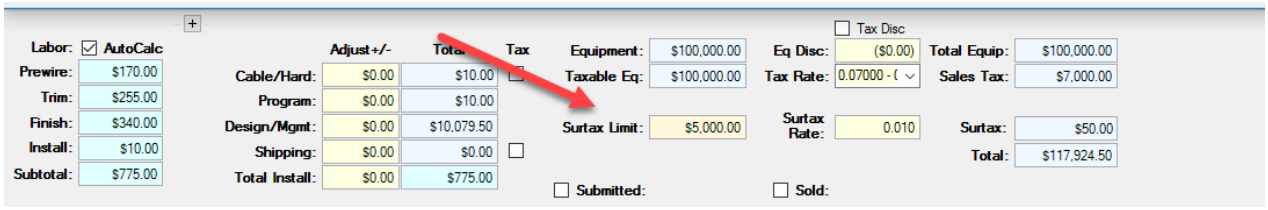
Surtax – with Rate and Limit

Some states charge surtax, which has a rate and a limit (threshold). For example, in some areas in Florida, you must collect a 1% additional surtax on equipment, but only for the first $5,000.00 sold. Turn on Surtax in default settings. You can set the rate and limit in the bid summary or in bid settings. This requires new templates to print the surtax value. Contact support if you need new templates.



When a line item is hidden, the equipment price is moved to Cable/Hardware in the Summary section. Each line item has a checkbox to tax the equipment or not. When hidden, a taxed line item will correctly include sales tax within the Cable/Hardware section, regardless of whether the Tax checkbox for Cable/Hardware in the Summary section is checked.

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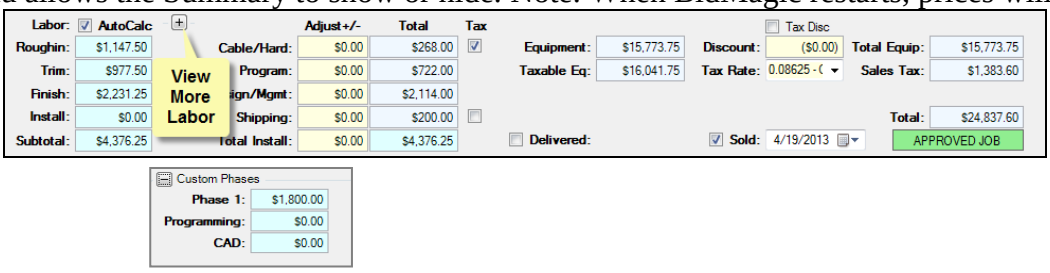
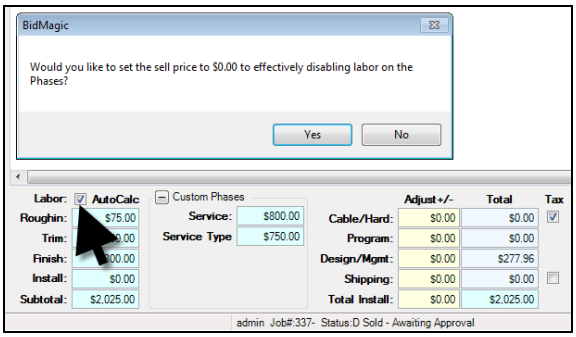
THE BID SUMMARY SECTION

Your standard pricing is automatically calculated in the summary section at the bottom of the proposal. BidMagic also makes it easy to make adjustments to your standard prices.
Totals for Prewire, Trim and Finish labor Phases are shown in the first column. Pro and Enterprise users can create additional labor Phases. Click on the + sign to view additional Labor Phases. The View Menu allows the Summary to show or hide. Note: When BidMagic restarts, prices will show.

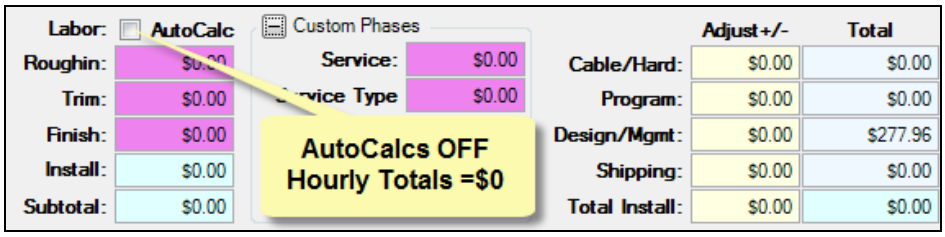


Labor AutoCalc

This is a new and powerful option that toggles automatic hourly labor calculations on and off with a single click. The AutoCalc checkbox is normally checked so that the Prewire, Trim, Finish and other hourly labor phases contained within the products will multiply by the hourly rates in the Bid Settings for this Bid and display the totals here.



Unchecking the Labor AutoCalc checkbox overrides calculations for hourly labor phases, setting both sell price and cost to $0 per hour and highlighting them in purple as shown here. Caution: Unchecking this box in error will not include hourly labor charges in this Bid. The labor hours included in the products can still be tracked, but do not affect the prices.



We recommend turning Labor AutoCalc off when:

1. Your standard labor hours do not apply. Example: Your standard hours are based on requirements for new construction and this is a retrofit job where none of those standard hourly requirements apply.

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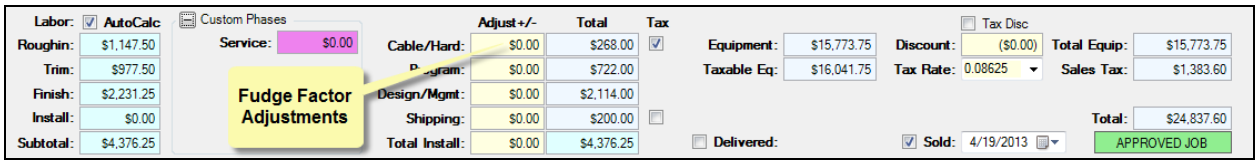
2. You have added hourly labor values to some of your products, but not all. When some products include labor hours and others do not, the resulting partial labor calculations are not always desired.

Note: Checking this box again will turn labor calculations for this Bid back on, based on the hourly rates in Default Settings. Bid Settings allow additional changes for each labor phase.

Adjust +/- Fudge Factor

There are special yellow ADJUST +/- boxes that that allow you to override or 'fudge' your standard pricing for cable, programming, installation and design/mgmt. Enter positive or negative adjustments as needed. This is a fast, easy way to make “bottom line” adjustments. Fudge factor adjustments have no affect on Room/Area totals in the body of the Bid. (If you wish to show changes within Room/Area, make line item changes there instead.)



Note that Labor Hours for Prewire, Trim and Finish (plus any flat rate Installation amounts assigned to the products) are calculated together to form this Installation total. Any price adjustments you make to ADJUST +/- for installation acts on the final total.

The Design/Management field pulls a percentage from the Default Settings (global) or Bid Settings (current Bid). If you want to charge a 10% fee, enter 10.

The yellow Discount Box allows you to enter a System Discount. This is a discount on equipment. Check the box Tax Disct. (Tax Discount) if you choose to give a Sales tax reduction calculated on the 'Discount' amount. (ie. discount applied to taxable equipment)

Choose the percentage of Sales Tax from the dropdown box.
The Default Settings Menu allows you to set Default amounts for Sales Tax, Design/Project Mgmt. These can be viewed and changed in the Bid Settings.

Note: For you convenience there are several summary items that will not appear if their value = $0.00. For example: if Discount = $0.00 then the lines Discount and Discounted Total will not appear. Who would want to print out Discount $0.00 and make their client wonder if he should have received a discount? Also Programming and Design/Mgmt work this way. If you leave them at $0.00, they will not show in the client copies. All other summary lines show by default. If you wish, you can edit these lines once they are in a Word document.

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Created Date, Submitted Date, Sold Date, Inactive Status & Lock Bid
This shows when a bid was created, submitted to the client and date sold and can be viewed or edited in Bid Settings. This is helpful to create sales reports for selected time periods. When a Bid is marked sold, the estimated close date will automatically be updated to the sold date. The probability to close will also be set to 100% and the Target Budget will be updated to the amount sold. This helps by automatically updating this info for the Sales Pipeline graphs. Bids can be locked to prevent changes.

View Profit Estimate
Double Click on the word '**Total**' to see your Estimated Profit and Gross Margin at the bottom of the Bid. (admin. only). Note: Enter your labor costs in Default Settings, Bid Settings and Product Labor details for accurate estimates of labor profits. If you have not entered any labor costs, this estimate will calculate profits based on 100% markup of labor. Note: Profit Markup is not the same as Margin. Profit Margin = Income/Revenue x 100. For more details, view Profit Report.

USING THE SUMMARY FOR BILLING AND ACCOUNTING

If you do not use QuickBooks, here is a tip on how to enter Bid information into your accounting software. After a proposal is accepted, present the proposal to accounting to enter these summary amounts: Equipment, Cable, Design/Mgmt, Programming, Installation and Sales Tax directly into your accounting program. Then it is a simple matter to generate invoices or statements for your clients from these programs based on these bottom line amounts. This can save additional time while providing what is needed for billing, accounting and tax records.

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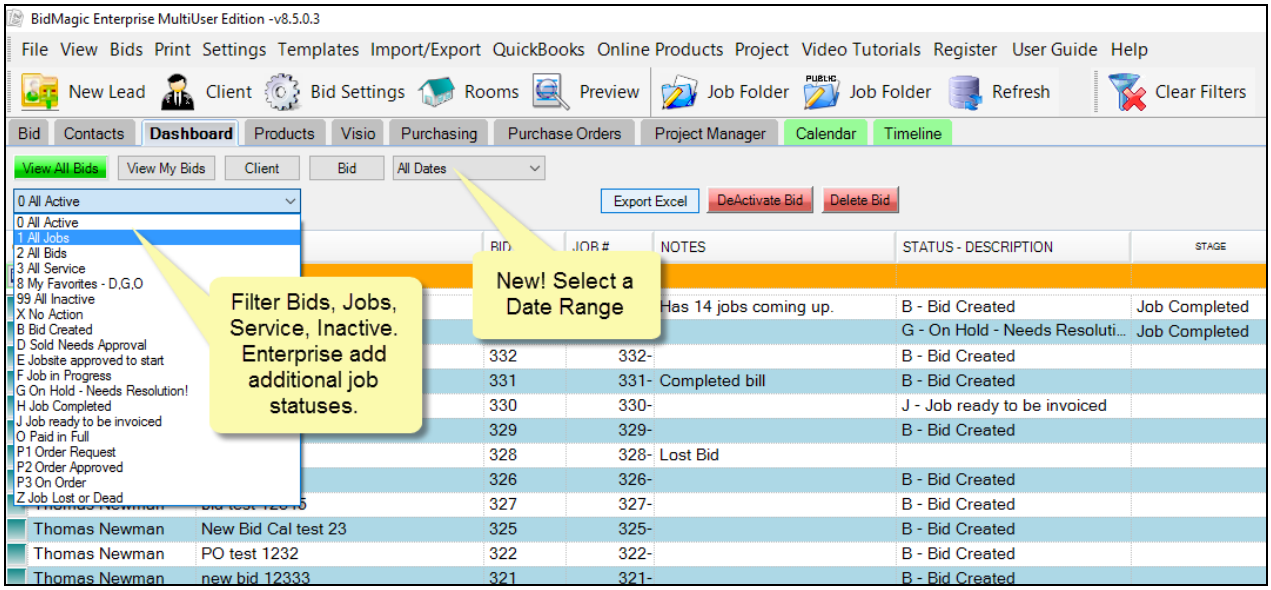
THE DASHBOARD – CLIENT/BID NAVIGATION CENTER

This screen allows easy selection and navigation of Clients and their associated Proposals. This is a powerful dashboard to pull up bids and jobs, add notes and instantly navigate to needed information. Contacts do not appear on the dashboard. The dashboard only shows Clients that have a Bid or Service Ticket. To convert a Lead to a Client, open the Lead in the Contact Page, select the Lead and click New Bid or New Service.

Click on any column header to sort ascending or descending. Enter a value in the Search window to filter by any value in the dropdown box to find Bids, Jobs, Service Calls and Inactive Bids. Click on the green box at the left to select a Client. Then click Client or Bid to open the Client or Bid to view or edit. Double click anywhere on a Client row to open the Bid. Right click anywhere on a Client Row to open the shortcut menu with additional options. (Clients will not show on this table until a Bid has been started for them.) Additional features are available here for Enterprise users, including searching by Job Status and setting up Status Favorites to create a personal To Do List. Clients appear here. Lead contacts do not appear in the Dashboard until they are elevated to a Client. (Bid Started)

Dashboard Notes

Beyond viewing when bids were created, submitted and sold, you can directly type notes on the Dashboard for each Bid, Job or Service call. The notes can be used for a variety of purposes, but are very useful to keep track of work that has been scheduled, completed, etc.



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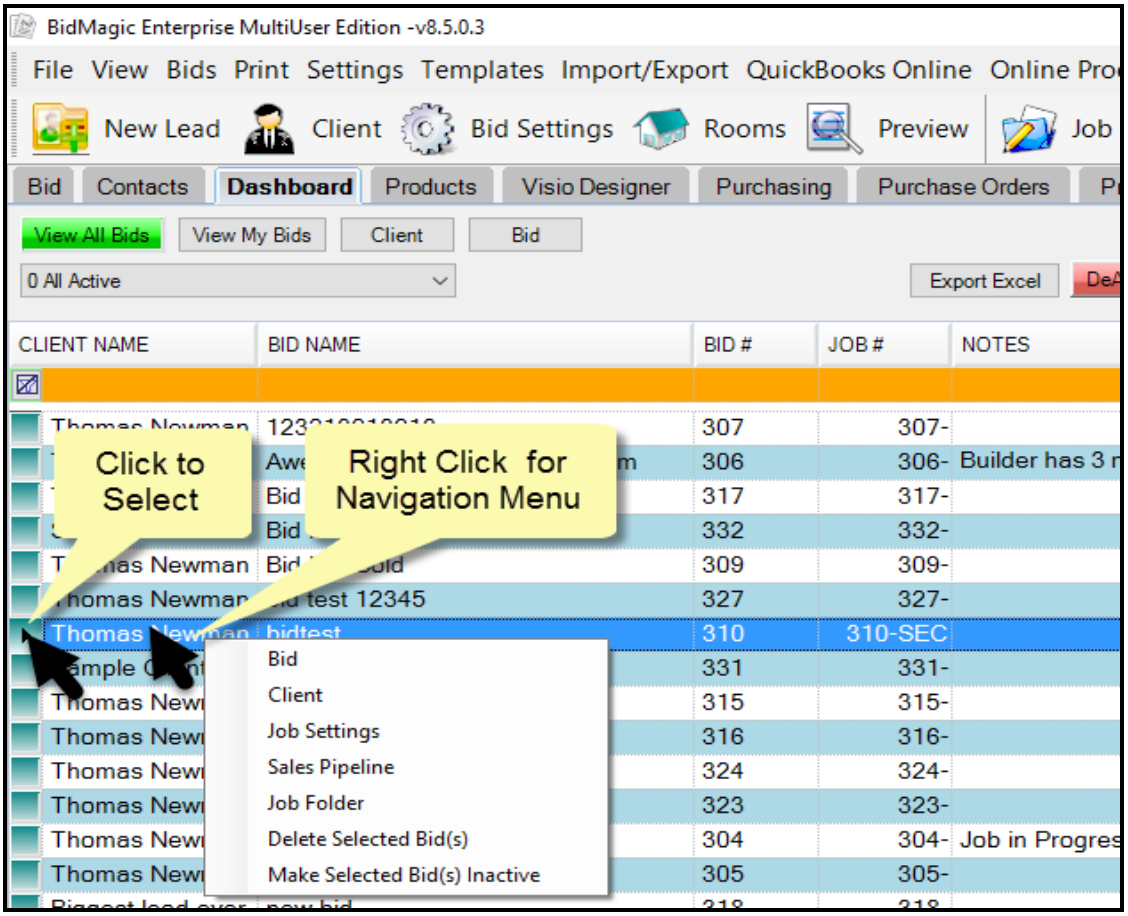

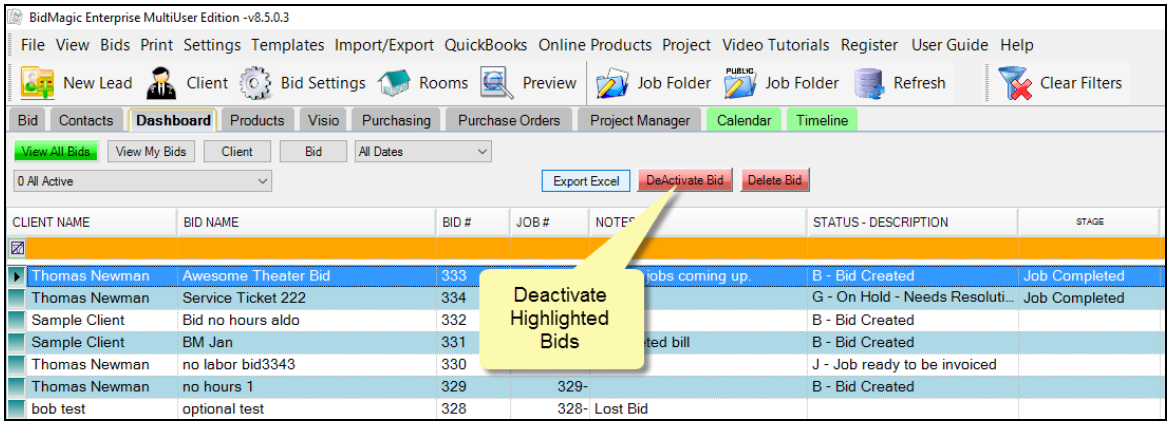

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BIDMAGIC MENU TREE (FEATURES VARY BY VERSION)

(Coming soon)

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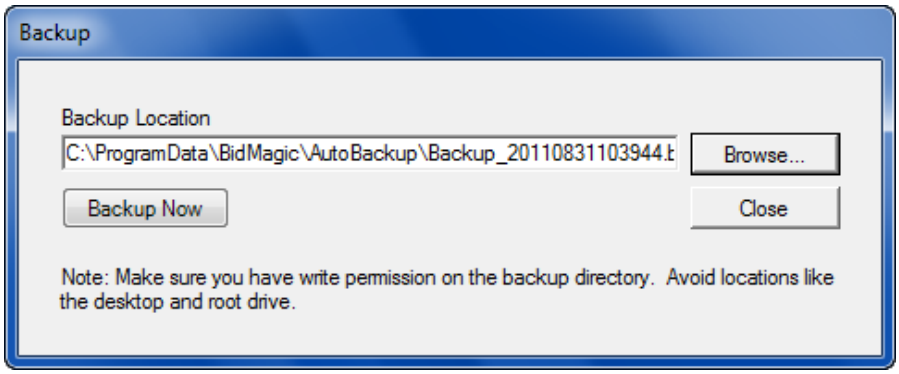
FILE MENU

Open Portable Bid (Pro/Enterprise Feature)
This new feature allows Opening a Portable Sent from another BidMagic user. (Designed to allow non-connected users to send and receive Bids)

Save As Portable Bid
This creates a special version of a Bid that can be sent to another BidMagic user. This allows mobile users to work on proposals without requiring them to be connected to a network or server. All users can create portable bids. Only Pro and Enterprise users running the same version of BidMagic can open them. We recommend that disconnected users share the same Product Tables, which can be kept up to date via Excel Import/Export.

Backup Database (Admin only)
Use this feature to create backups and to assign where you want the backups to be stored. Store backups on a different drive if available. Be sure you have permission to write to the selected path and do not select the desktop or root drive as the path. BidMagic makes automatic backups prior to performing some procedures. The backup location is shown when a backup is created. This will close BidMagic while creating a SQL backup. **After backing up your database, please make additional copies of your backup files for offline or offsite storage.**



Restore Database (Admin only)
To restore from a backup copy, select Backup then click restore and locate the file you wish to reinstate. Warning: Restoring your Database will fully overwrite all data. Each backup file name includes a date stamp within it.

Moving BidMagic to a new system (with the Backup / Restore Utility)

Moving BidMagic information from one machine to another is easy; it can be done in a few steps.
First backup the “old” system
Copy the backed up data onto a USB stick or suitable drive.
Go to the “new” system and then restore the information.

This will transfer both Client and Product information to the new PC.

Backup Utility
There are two methods for backup and restore your BidMagic data, Basic and Advanced. The Basic method will work on 95% of the systems out there; the other 5% is designated for more complex systems.
To initiate a backup, the simplest method is from inside BidMagic.
Go to the File tab and select Backup (version 8 depicted).

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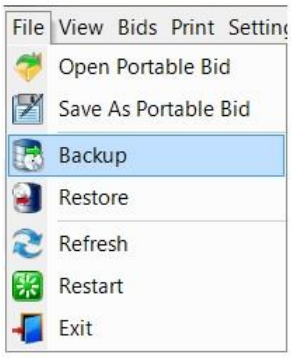
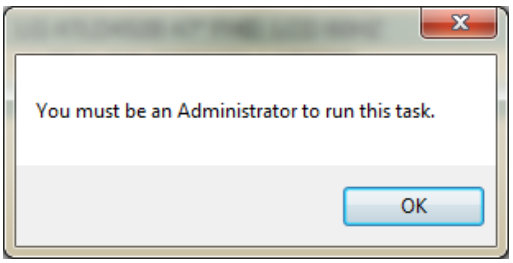
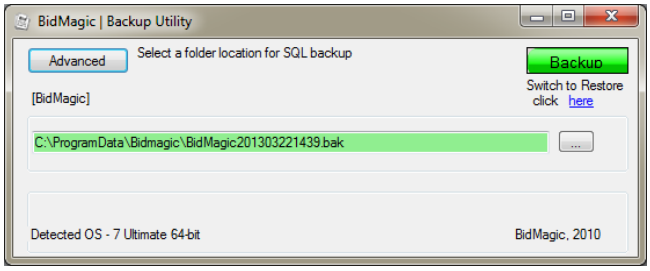
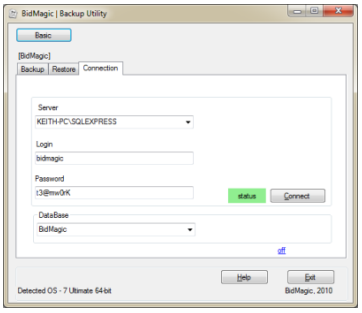
It will inform you that you must be an Administrator on the computer to perform the Backup task. Press OK.





It will now open up the Backup utility, either in Basic or Advanced mode.

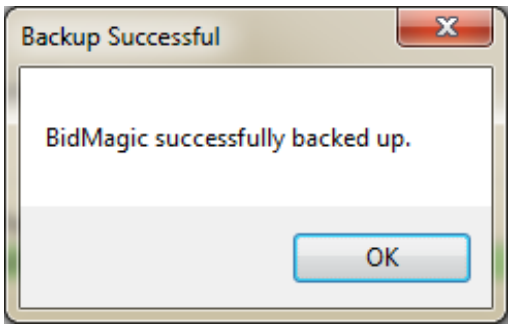




Basic Method
The fields should auto-populate, Server name, Login, Password and Database name.
The server name should reflect the name of the system where SQL Server is install and running.
In this example, it is running on a system called KEITH-PC.

The SQL Server instance is: KEITH-PC\SQLEXPRESS.

The Backup Utility using the Basic method was designed for ease of use.
The default backup file path is indicated; here it is:
C:\ProgramData\BidMagic\ ***[the BidMagic file and date inserted here]***.bak
Press **Backup** and the BidMagic data (customer & product) will be backed up.
The Backup utility will inform you of a successful backup. Program Data is a hidden folder, so you may need to adjust your folder settings to view it.



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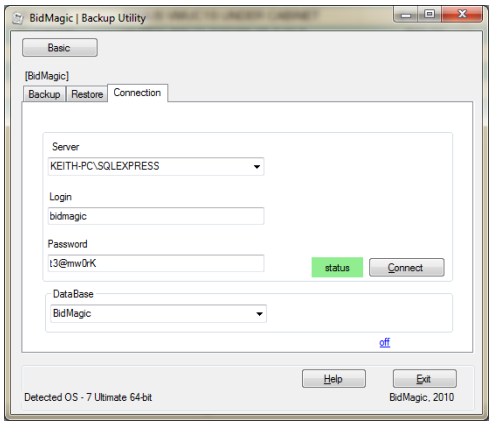
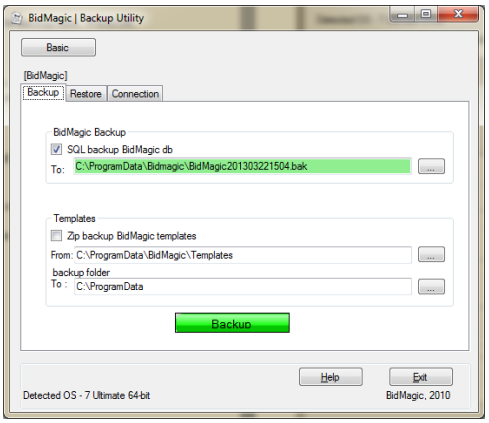
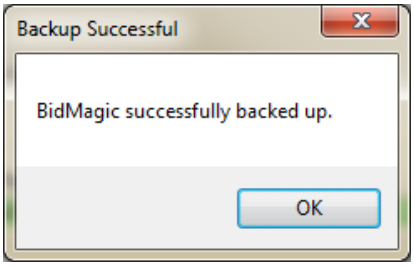
Advanced Method
The Advanced method will require some more steps, but it allows for more options as well.
The advanced method lists the server name it connects to and it allows you to back-up your templates.
Assuming the Server name is correct press the Connect button.
If the database name to SQL Server is correct, the status will be highlighted in green, if not correct, it will be yellow.

Then go to the Backup tab.
As in the previous method, it will back-up the data to a default location, please do not change this.





As in the other method, the utility will inform you of a successful backup.



Refresh
Click Refresh to refresh any changes made on the active screen. (F5 is the keyboard shortcut)

Restart
Click Restart to quit and restart BidMagic. This is faster than closing and re-launching BidMagic.

Exit
Closes the BidMagic application.

VIEW MENU

Bid
The Main Bid Creation Page

Products
The Products Page shown in Table View

Project Manager

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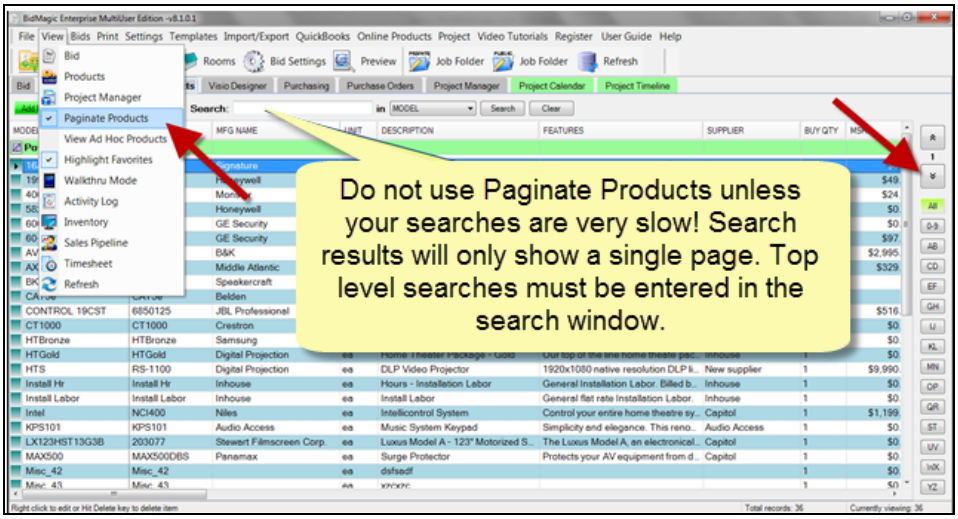
This is a super simple Project Manager for companies who want to order just in time and track everything on a per job basis. Use this screen to order products and track installation completion. You can also export from this screen to Excel. Inventory and Asset tracking also appear on this screen when active.

Show Line Item Prices
Choose to display line item prices on Bid Page or hide them. This setting controls normal Bid view and Touchscreen view. When BidMagic restarts, prices will show.

Show Price Summary
Choose to display the Price Summary section on the Bid Page or hide it. This setting controls normal Bid view and Touchscreen view. When BidMagic restarts, prices will show.

Paginate Products (Optional)
Do not check the Pagination box unless you have over 10,000 products and experience slow response on the Products Page. This feature may help speed up Product filter searches if you have loaded more than 10,000 products in your Products page. If Pagination is turned ON, you will see a limited view of only 5,000 products on the page at a time. This is similar to searching in a web browser where you see only limited search results on a single page and then your must select the next page to see more results. Leave this selection off for best filter results unless you verify faster operations. Filtering will only be incomplete and display results from the first 5,000 products. Note: The top search box searches all products even when Pagination is on. So, if you use Pagination, we recommend that you enter a search criteria in the top search box first before applying filters.



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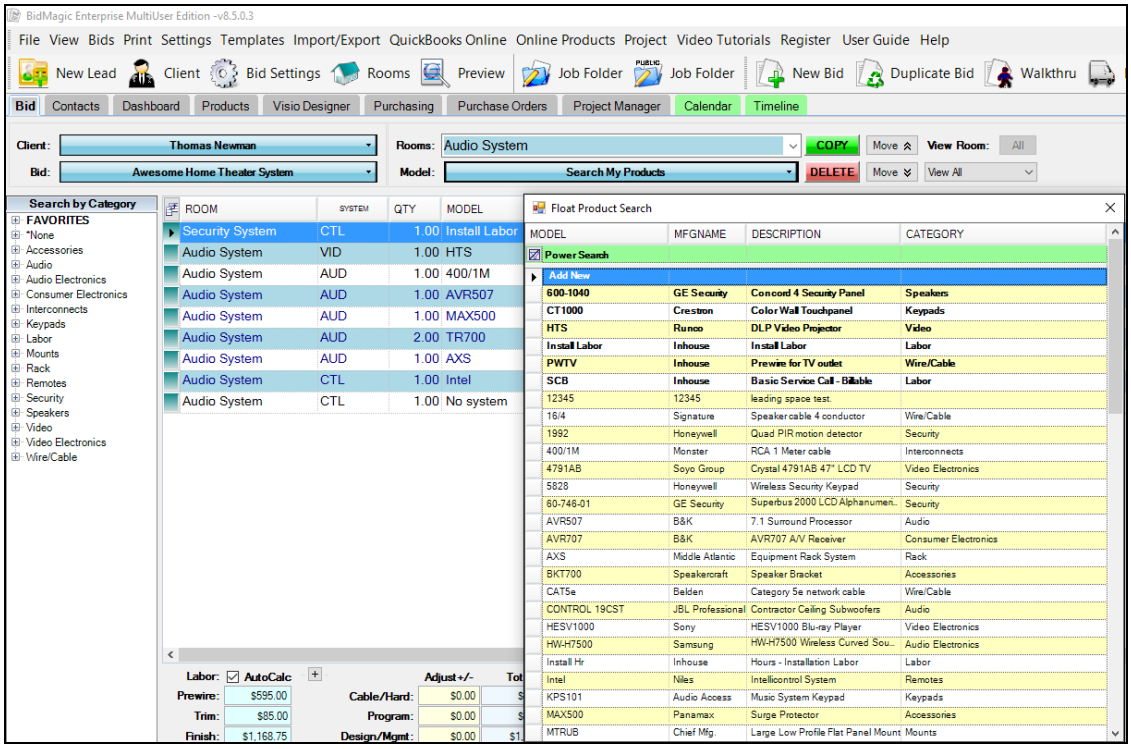

Float Product Search
Checking this box allows the Product Search Window to remain open after a search. This is a superfast way to add products to your bids. If you have 2 monitors, you can position the Product Search Window on the second monitor for awesome results.

View Ad Hoc Products (Enterprise Version)
This refers to a special feature that allows users to create temporary, miscellaneous products for a bid that are not seen in the Product Table. If you check the box to enable this feature, you will see ONLY the Ad Hoc products in the Product Table. Uncheck this box to resume viewing the standard products. More info is found under Enterprise features.

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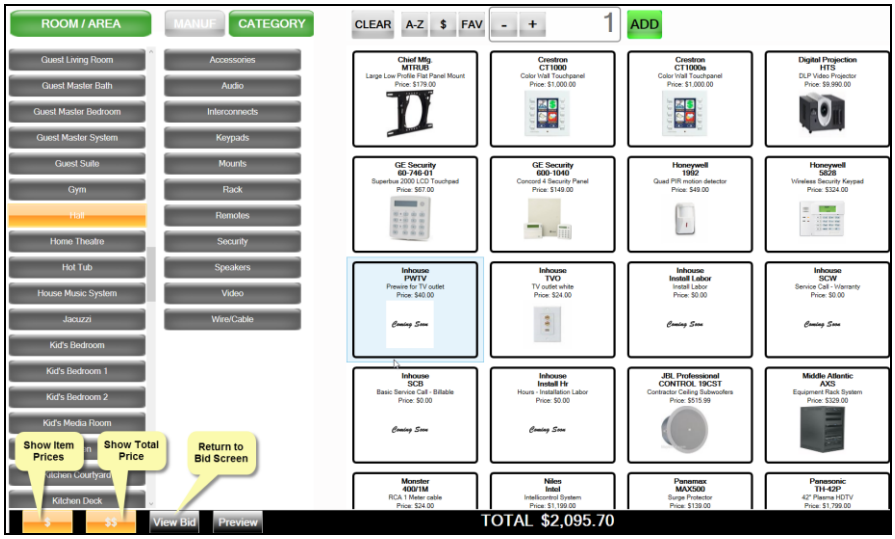
View All Bids (Multiusers Only) (Pro/Ent Feature)
Multiusers with Permission to Select All Bids have the option to View All Bids or just view their own Bids. Check the View All Bids to view all available Bids. (subject to your assigned multiuser privileges) Uncheck it to view only your Bids. If multiple locations or departments are partitioned in the Enterprise version, users may also be restricted from viewing/editing bids from other locations or departments. The View All Bids command is found in the View Menu on the Bid page and the top of the Dashboard shows View All Bids vs View My Bids. Sharing a Bid allows other users to view and/or edit Bids with a set of specific permissions.

Category Finder
The Category Finder on the left side of the screen can be turned on or off. Since Search My Products also includes a Category search. The left panel can be closed to provide more screen space and may speed up your search results.

Touchscreen
This new touchscreen design makes it easy to select and add items to your proposals. The touchscreen functions are available with Windows 8 & 10 laptops PC's and tablets which can run BidMagic natively. Other pads and tablets can use LogMeIn or other remote applications to connect to BidMagic over the internet to write bids with the Client or from the field using this touchscreen interface. This makes it easy to create proposals or build preliminary budgets from the field. Select a Room or Area, filter by manufacturer, category or favorites. The clear button clears the filtered selections. The $ button shows or hides product prices. The $$ button shows or hides the total price. The View Bid button minimizes this touchscreen and displays the Bid page. Hit the Touchscreen icon to return to this screen. Default settings let users show or hide pricing on the Bid page. The Preview button displays the finished proposal in MS Word. **CTL-W** is a keyboard shortcut that toggles the view from touch screen to Bid screen. Click View Bid to exit this view.



Activity Log
View and search the log of time/date stamped activities for Jobs and Inventory by job, date range, user, etc.

Inventory (Enterprise or Optional Pro Feature)
View by location, manufacturer and more. Send filtered selections to Excel for editing or printing.

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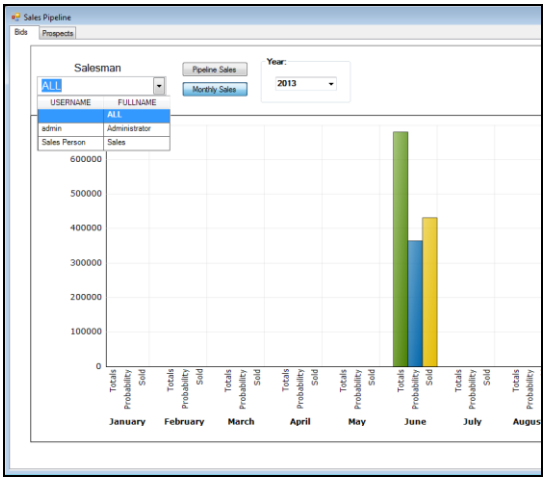
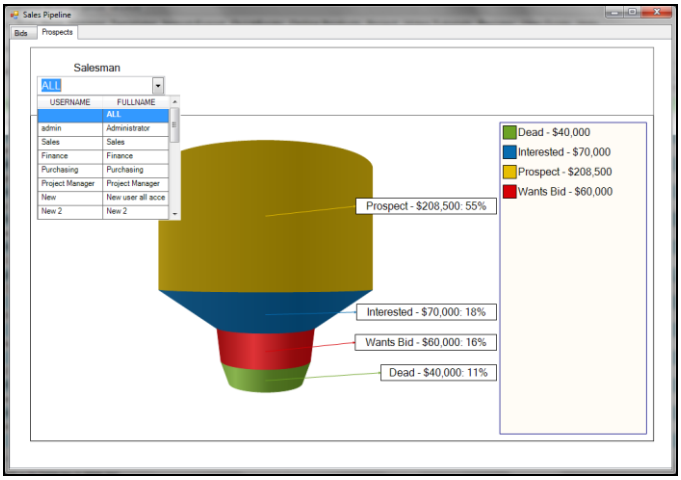
Sales Pipeline (Pro/Enterprise Feature)
BidMagic provides graphs for your sales pipeline for Contacts and Clients. The Contacts Sales graph tracks the pipeline for Sales Contacts before Bids have been created in a funnel graph.

The Clients bar graphs track current bids. The Client monthly sales bar graph has 3 bars. The first bar shows the total of all Bids expected to close during each month. The second bar shows the total of all bids expected to close and factors in the probability to close. The third bar shows the total of all bids closed during each month.

Select all sales people or a single sales person to include in the graph. Be sure to mark old revisions of Bids as inactive or delete them to avoid duplications from being included in these graphs. Right click on a chart to save it as a printable jpeg gif or similar image. Bids that are marked sold automatically update the close date, probability to close and target budget to the sold values.

Multiusers should setup each sales person as a BidMagic user to graph their pipelines. Note that when a Bid is marked Sold, it automatically adjusts the expected close date to the sold date and the probability to 100%. Keep in mind that Contacts graph shows the pre-bid pipeline as a funnel and the Clients show actual bids and sales results.





For accurate results, it is important to keep your Bid tracking up to date, including marking bids sold, inactive, etc. If you create multiple revisions of Bids without deactivating duplicates, the graphs will not be accurate.

Timesheet (Calendar Only)
Click Refresh to refresh any changes made on the active screen. (F5 is the keyboard shortcut)

Refresh
Click Refresh to refresh any changes made on the active screen that do not update as desired. (F5 is the keyboard shortcut)

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BID MENU

New Bid

Select an exiting Client first, then Click New Bid. If this is a new Client, click the Create Contact Icon first and click New Bid in the Contact form.

Copy Bid Items

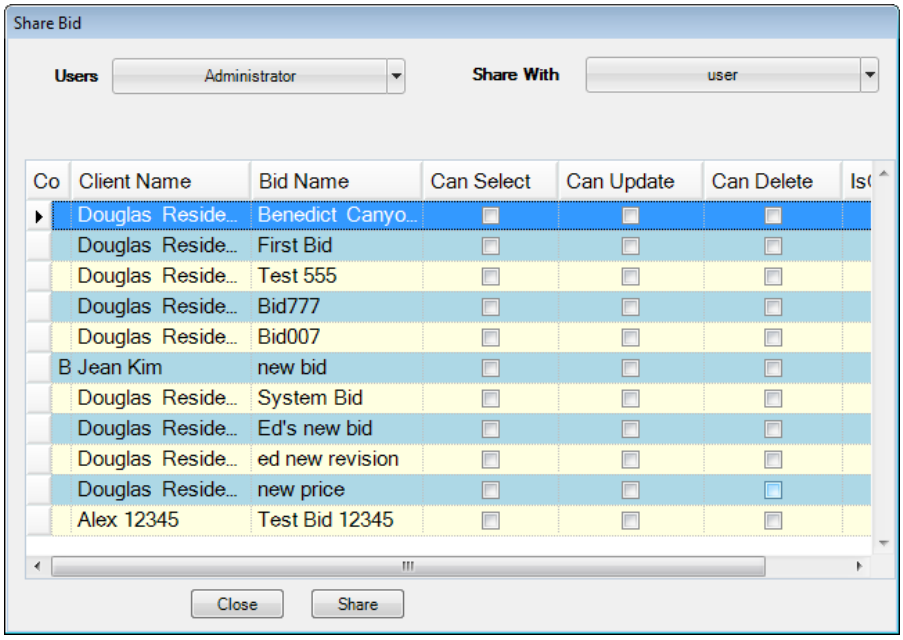
Select products from an existing bid and copy them into another bid. Select entire rooms or systems to copy from one proposal into another. Simply choose the Bid you want to copy from on the left and the Bid you want to copy to on the right. Select the line or lines (SHFT click or CTRL click to select multiple lines) then click the >> button to copy the line items.

Duplicate Bid

Create a new duplicate Bid or Service Call. Choose to duplicate exactly, or choose to create a copy with updated Products, Prices and Labor. You can also choose to copy Job Folder contents for the new Bid and/or make the original Inactive. Inactive Bids can be found in the Dashboard with the Inactive filter setting.

Share Bid (Pro/Enterprise Multiuser only)

This feature allows users to share a Bid with other users in a multiuser installation. For each Bid, you can select other users to share with and assign their privileges. Some users have view, edit or delete to all Bids (set in the User Manager) and do not require permission. Note Enterprise users can also be assigned access to only their Location/Department for further control. Sharing Bids can be done without restrictions to Locations/Departments.



Delete Bid

We recommend making Bids inactive, which keeps a copy that can be retrieved if needed. Caution: deleting a bid cannot be undone. The Dashboard provides easy access to deleting more than one Bid at a time. Multiusers can set permissions for which users can delete bids. Note: Deleting all bids for a Client reverts them back to a Contact.

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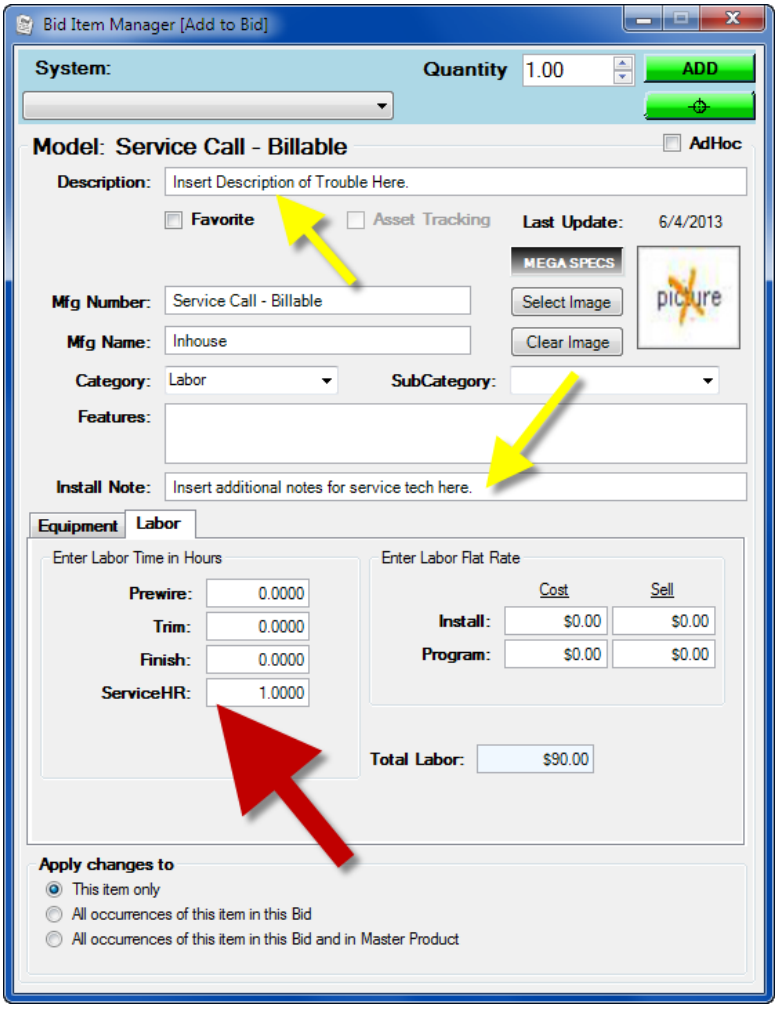
New Service (Pro/Enterprise Feature)
This is similar to creating a Bid but will be found as a Service Ticket in the Dashboard. To setup for service calls, we recommend creating a labor phase named Service. Then create a few service call products, such as "Service Call Billable" with $0 for equipment and 1 hour of ServiceHR for labor. This type of 'labor only' product is a very helpful item for certain Bids.

To create a Service Ticket, click on the New Service Icon. Select the Client and jobsite. Then open the Service Call (Bid), select a Room or Area where service is needed. Then add a Service Call to the Bid. Edit the Description to provide detail about the service needed. Each Service Ticket or Bid should contain at least one line item. If parts are needed for the service call, you can add them here also. Service Tickets are limited to 12 line items. When finished, click Print/Service Ticket. It is easy to Print or email service tickets directly to your techs in the field. Once open in Excel, you can print or email it as PDF or Excel attachment.

Calendar user can then click Project > Send BidMagic Bid to Calendar where it can be dragged onto the Calendar for scheduling and tracking. Service Calls are automatically marked sold to simplify the steps needed to send to the optional Calendar for scheduling. Note: Limited license users can create and edit service tickets, but not bids.



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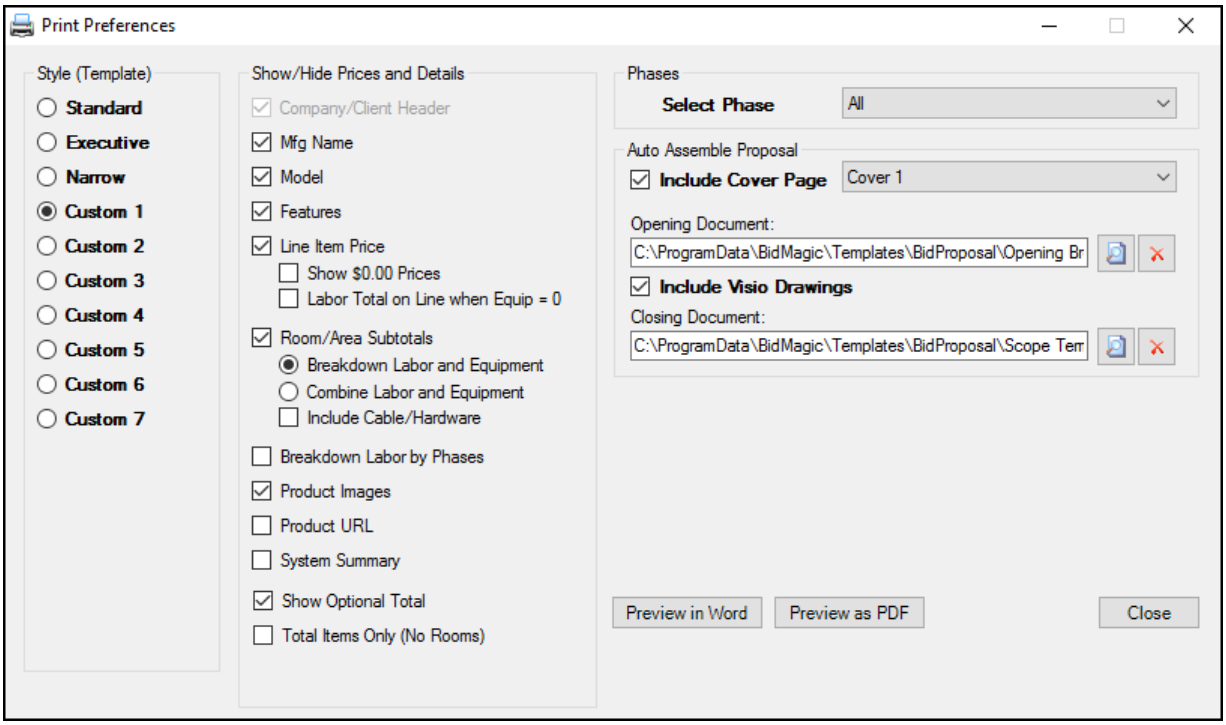
PRINT MENU

This is found on the main Bid page and is where you select which reports you want to print and how you want them to appear.

CLIENT BID

Print Styles set the style of fonts and layout for your proposal These include Standard, Executive, Narrow, Custom 1 - Custom 7, which provide many choices. If you need a different look, output a proposal to MS Word to edit the report. Note, service tickets must be printed using the print service ticket menu.



Print Preferences

Print Preferences provide powerful choices as to the look and style of the Client copy. You can show or hide prices and details and assemble a complete finished proposal.

Style (Template)

Check the Proposal Style you desire. This chooses the Word Template you want to work with. We recommend using a quality color printer for the best results.

Standard, Executive and Narrow include option to include your company name and address plus the Client's Address in the top section.
Standard: Blue Bars, MFGName and Model Shown on second line
Executive: No Bars, MFGName and Model Shown on second line
Narrow: No Bars, Labor & Equipment show on each line item. MFGName and Model Shown on second line.

Custom Templates have the top section blank so you can add your logo, etc.
Custom 1: Blue Bars, MFGName and Model Shown on second line
Custom 2: Blue Bars, Product Images included within Rooms instead of end section
Custom 3: Gold Bars, MFGName and Model Shown on second line. Price each and extended price.

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Custom 4: Page Framed, Marble Bars, MFGName and Model Shown on second line
Custom 5: No Bars MFGName and Model Shown on second line
Custom 6: Blue Bars, QTY, Model and Description on single line Client Info at top right.
Custom 7: Blue Bars, Installed Price on each line item. Model and Description on single line Client Info at top right. Total installed price.

Show/Hide Prices & Details info for Client Bid
Check or uncheck these menu choices to show your company info and client info in the Header. To print on your letterhead, then do not check Company/Client Header. If you are printing on plain paper, or preparing the client bid for emailing, you will want to include that header. You can show or hide full length product descriptions, line item prices, area subtotals and Breakout Labor in the Summary. (Prewire, Trim and Finish detailed totals) Add MFGName prints the manufacturer's name at the beginning of the description so it does not need to be contained in the description. When Model is selected, the Model number will be shown in the Client's copy. Product URL includes a hyperlink to the product information. The Pro Version includes additional custom templates.

Showing Equipment Prices or Labor Prices on Line Items
In a standard line item the Total Price of equipment is shown. The labor is not shown here, but is shown in the room/area totals and in the proposal summary.

If you wish to create Model numbers for Labor only items set the Equipment Sell Price =$0.00. For these labor only items, you can choose to have the clients copy show prices for the labor instead of $0.00 or blank for equipment. Check Show Labor Total when $0 Equipment to show the labor instead. (This is not allowed when printing a single phase of a bid.) If you wish, you can use AutoLink Package to attach labor to Equipment above it. Here is a Labor Item Example:

1	PWTV	Prewire TV Outlet	$125.00

To obtain this result, be sure that 'Show Labor Total when $0' and 'Show Line Item Prices' are both checked.

If 'Show Labor Total when $0' is not checked, no price will display on the line item, but will still appear in Room/Area Subtotals and Bottom Line calculations.

1	PWTV	Prewire TV Outlet	$0.00

Show Room/Area Subtotals
Check this option to display the subtotals in each room or area. You can choose to show detail of Equipment and Labor values or combine them into one amount. Keep in mind that Labor, Programming, Design/Mgmt, Shipping, Discount, Sales Tax, etc. are shown in the Summary Section of the Proposal and are NOT included in Room/Area Subtotals. If you Hide products with the Hide feature (which reassigns them to Cable/Hardware) and show Room/Area Subtotals, we suggest that you check the box to include these hidden Cable/Hardware items in the area totals. If you Hide Items and show Line Item Prices and Room Area Subtotals together, we suggest you do not check this box, because the result adding the Cable/Hardware prices here may confuse the client.

Breakdown Labor Phases
Check this option to display the subtotal of Prewire, Trim, Finish Labor and Installation in the Summary section of the Client Bid. If unchecked then a single total named Installation will appear.

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Show Product URL
Check this box to include hyperlinks to product info on the web. These links can be clicked in Word docs or PDF's. They links can be viewed but are not active in printed copies.

Show Product Images
Check this box to add pages after the Project Summary to your proposal with product images and details. If you include JPEG, Tiff, GIF or Bitmap images in the Product Manager, they will appear on these pages for your client reports. Images stored in the database will be resampled for appropriate sizes. Custom 2 automatically adds images directly on line items in the Bid. (Pro Feature)

System Summary (Pro/Enterprise Feature)
Show Totals of each system at the bottom of the Proposal. The System equipment and labor totals can be show separately or combined into a single amount.

Show Optional Totals
Check this box to see optional totals in rooms and in the bid summary.

Total Items Only (No Rooms) - (Pro/Enterprise Feature)
Checking this box removes references to rooms or headers in the Client Copy and only shows the total for all products. This is of use for extremely large bids that need a consolidated total without room details.

Print All or select a Phase for Client Bid (Pro/Enterprise Feature)
The complete Bid is printed by selecting ALL. You can choose to print the equipment and labor needed for just a single phase, such as prewire. BidMagic will add the name of the phase to the name of the Bid.

Sample results for prewire: If your bid includes a TV that is installed in the finish phase but you sold labor for that TV that is done during the prewire phase, the TV will appear on the line item and show just the prewire labor associated with it. Note: the TV shows to display the labor for it occurring in prewire phase. However, the TV itself is not being installed during that phase.

Please note the following details: Cable/Hardware is assigned to the Prewire Equipment Phase. Programming is assigned to the Finish Labor Phase. Design/Mgmt is split evenly across all 3 Phases. (This does not change if you add additional user labor phases.) Sales tax is calculated on the Products and Labor included in the selected phase.

If you plan to use this Print by Phase feature, be sure to assign equipment phases to all Products.

AUTO ASSEMBLE PROPOSALS

BidMagic allows you to include a Cover Page (Pro/Ent Versions include 6 Cover Page choices), Visio Drawings (Optional Feature) and opening and closing pages to be automatically assembled with your proposal. Each Bid can include the unique documents that are assigned to it on this screen.

Adding Opening and Closing Documents
You can use our sample documents found in the Opening_Closing Docs folder or create your own with Word 2007-2016 to print and assemble as part of your client proposal. Before printing, browse to Word documents you wish to add at the beginning of the proposal and at the end. If you make it a practice to customize the opening and closing docs for each proposal, we recommend saving a copy of

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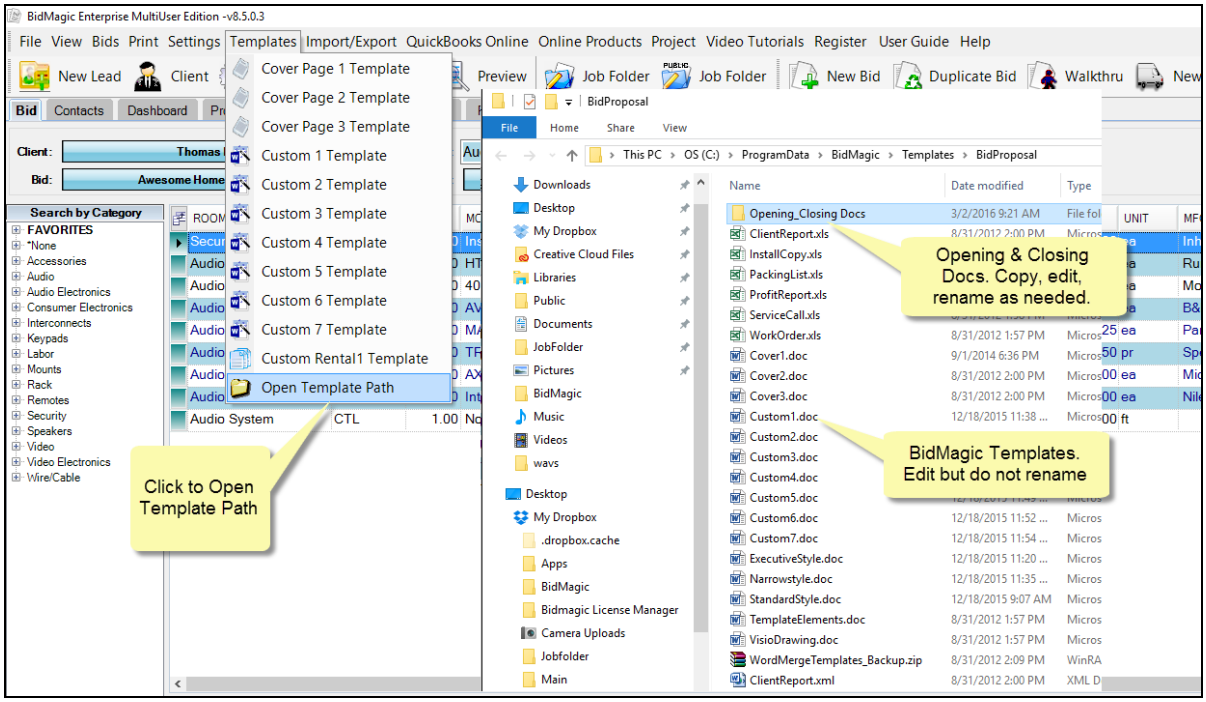
the document with the bid number appended to associate it with that one specific proposal. For Bid 352 for example: ScopeTerms-352.

Use Word to create these additional pages and save them for adding into the finished proposal. When multiple pages are assembled together, the best results are achieved by keeping the formatting consistent. We recommend keeping page margins and paragraph line spacing consistent. Any footers you add may override the footers in BidMagic. See Customizing Templates for more info.

Users can add Merge Fields from TemplateElements.doc to automatically populate the opening and closing documents. For example, the client name, job name, salesperson name, etc. can automatically fill from the selected Proposal. Click on Templates/Open Template Path to view the path to your templates. This provides direct access to your templates and opening/closing documents that you can use and edit.

If you include a payment plan in Bid Settings, be sure to select a closing document that includes payment plan features.



If you have formatting trouble when auto-assembling documents, we have provided a copy of the Word Normal.dotm Template (Word default template) in the Templates/BidProposal Folder. You can copy it into your Word templates folder for your use. Follow these instructions from Microsoft to adjust the normal (default) templates in Word.

Preview in Word

This option assembles all of the selected elements and opens as a document in Microsoft Word. This output is very easy to edit, print, email or convert to a PDF. After viewing the bid in Word, you will have the option to save a copy in the BidMagic Docs Job Folder. You can SaveAs a PDF in MS Office or use other PDF creation software.

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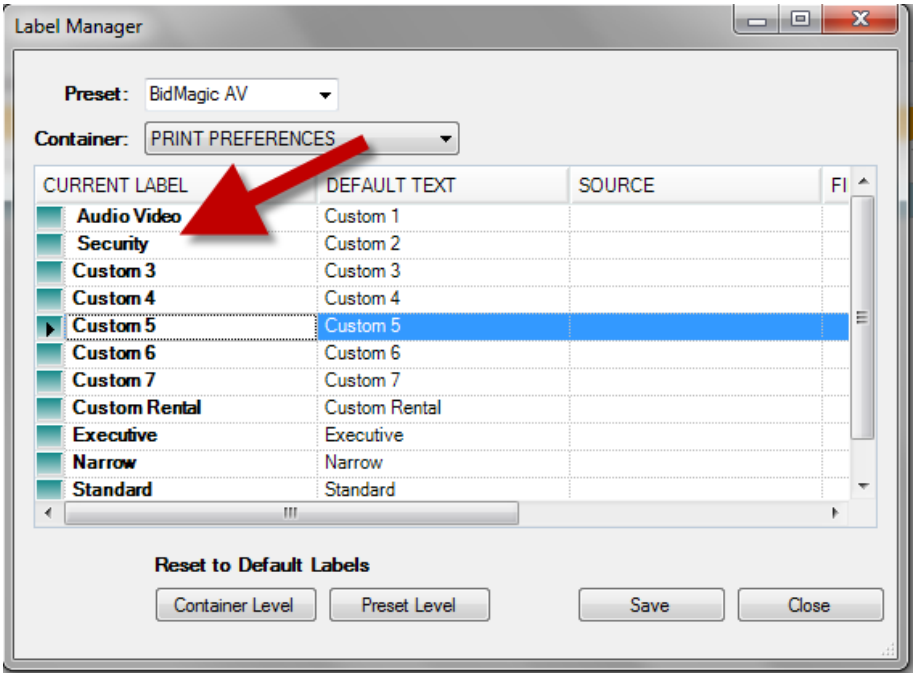
Preview as PDF (Enterprise Only)
We recommend that you first print to a Word document and review the formatting and then save it from Word as a PDF. If you choose to print a PDF directly from BidMagic, you will not be able to make formatting changes. A copy will be saved in the BidMagic Docs Job folder. PDF's are the preferred method when emailing proposals for two reasons. First, they can be viewed by many devices using Adobe Reader and do not require Microsoft Word. Second, they cannot be changed. (Certain exceptions apply)

Changing Custom Template & Cover Names Shown in Print Preferences
BidMagic will only print the default template name assigned. For example, if you rename Custom1.doc to another name, it will not print the Client Bid. However, you can use the label manager (which can change labels for most BidMagic screens) to change the names that appear in Print Preferences. Click Settings/Label Manager, then select the Print Preferences container as shown below. Note that the current label Audio Video will be shown instead of Custom 1. You can also change the name for Cover Pages here.



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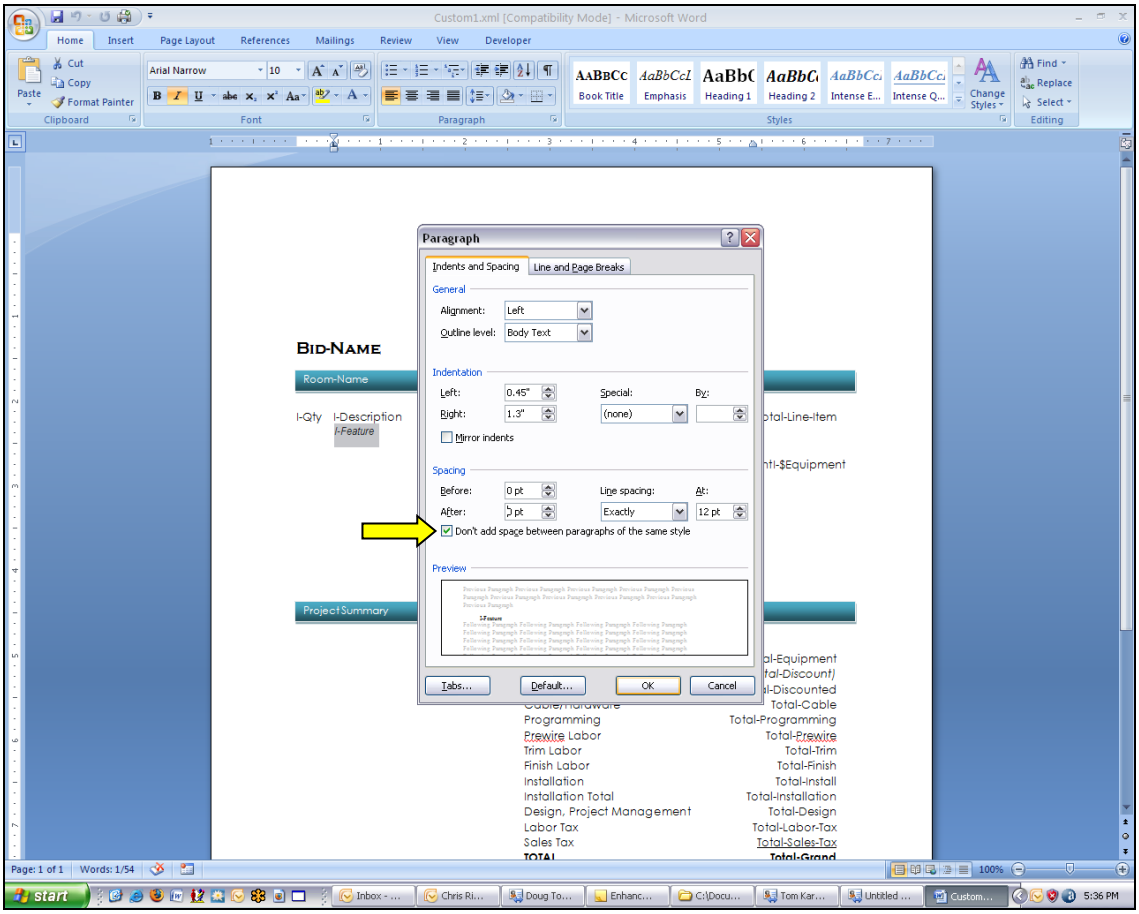

Word can automatically add additional line spacing to documents assembled by BidMagic. You can resolve this by correctly formatting the paragraph settings for those templates. Highlight the paragraph in a template that adds extra spacing and in the dialog box, set the Spacing/After setting to “0” points. Also check the box “Don’t add space between paragraphs of the same style.” Then save the template.

You can easily create multipage documents for the opening that include a graphic cover page and cover letter. For closing documents, you might create a single document including project scope, terms, acceptance and references. This assembled document can be printed or converted to PDF’s for easy attachment to email. If you are emailing the proposal BidMagic can assemble the entire Word doc or PDF for you. Be sure to close all required documents before attempting to include them in a Bid using Auto Assemble. Assembly of opening documents may alter the line spacing of the Bid pages. Please test formatting of documents before assembling to beginning.

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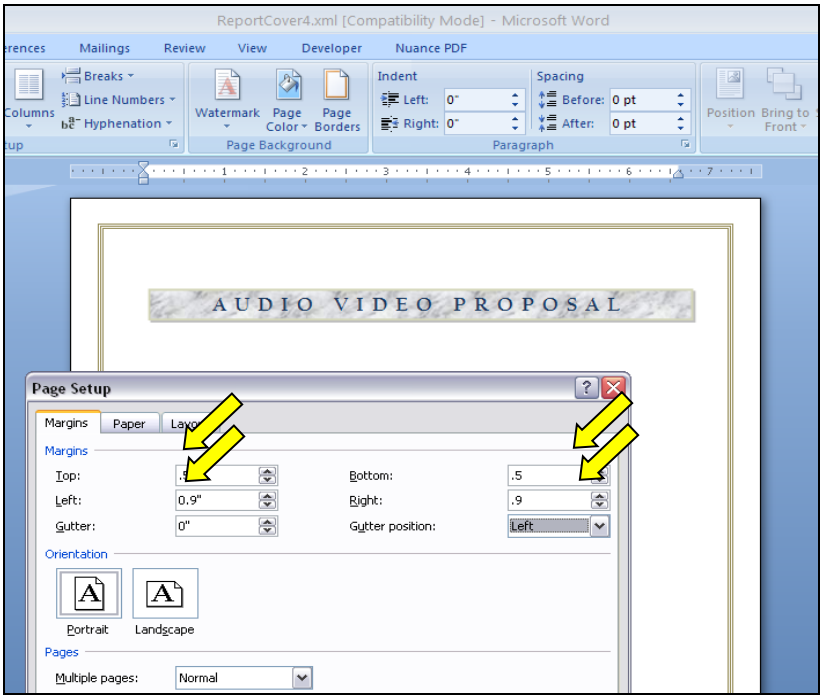

Important Standard Margins, Headers and Footers for Word Documents
Best results are obtained for assembling documents when all documents have the same margins. See the Page Setup for above for BidMagic settings. On the Layout Tab, Headers are set at 0.5" and Footers at 0.3". Footers from the first page usually dictate the rest of the footers in the other pages. The Cover pages suppress the footers, but that can be changed by unchecking 'Different First Page' in the Layout settings. Set Margins as shown. Click Default to make these your default margins.

Client Bid Templates Provide Presentation Options
Standard, Executive and Narrow Styles add your company info and clients name and address at the top. Custom 1-7 contain space at the top for you to customize and add your logo. Narrow Style shows Equipment & Labor for each line item. Custom 5 can show Product Images on each line item instead of within a separate section in the Bid.

Opening and Closing Document Samples
We have included some sample Word documents designed to be used for auto-assembling complete Proposals. Feel free to use them or edit for your needs. Users agree to hold BidMagic corp. harmless for use of these sample documents.

These can be found by clicking Templates/Open Template Terms, Scope and Acceptance1-4.doc samples match the formatting of Custom1-4.doc templates. These sample documents can be used or edited and renamed as you desire. We recommend having an attorney in your state review contractual language in your proposals.

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PRINT MENU (CONTINUED)

This is found on the main Bid page and is where you select which reports you want to print and how you want them to appear.

Install Copy
Hides all prices, shows complete information for installers. Jobsite/Ship to address and contact name are shown. Directions, Line items with Installation Notes and Salespersons notes are included. You can create this report in either Word or Excel and there are options to include notes from installers.

Sales Report
Select a date range and BidMagic provides a breakdown of sales by each salesperson. Track bids created, submitted, sold, abandoned and the total for each type. Note that View Sales Pipeline provides graphic views of sales activity.

Service Ticket
Creates service tickets with client and jobsite info, line item details, install notes, Description of Work, notes and optional form for Field Notes. Service Tickets can only be printed from this menu and cannot be printed as a Client Bid.

Client Report
Sends Client Contact info to Excel Spreadsheet for Printing or importing into other programs, such as Outlook or other email programs.

Profit Report - Excel Worksheet
This is a basic report, which calculates your gross profit on all the equipment in the proposal. Please be sure to enter your labor costs into Default Settings, Bid Settings and Product Labor details to increase the accuracy of this report. If you have not entered any labor costs, this report will default to calculating labor profits based on 100% markup of your labor. This report shows the total number of hours sold for all labor phases and other totals.

This is very helpful in tracking whether a job was completed on schedule. If it took 4 hours to install a TV and you only sold 2 hours, it is important to review that info and determine if a future price adjustment is needed. Available in Word or Excel format.

This software is not an accounting package and is not designed for a complete breakdown of all possible expenses. Print a job report in QuickBooks and compare your actual hours used with those sold. This is important feedback to continually stay on top of your performance and profits.

Dimension Report
This report includes all products with their dimensions and weights. This is helpful for cabinet makers and installers. When adding Products in the Product Table, we suggest that you only include dimensions and weights on those products where this info is helpful. For example, the full dimensions and weight specs on a TV going into a cabinet are very important. On the other hand, the dimensions of an in-wall speaker preconstruction bracket will probably never be needed on a field copy.

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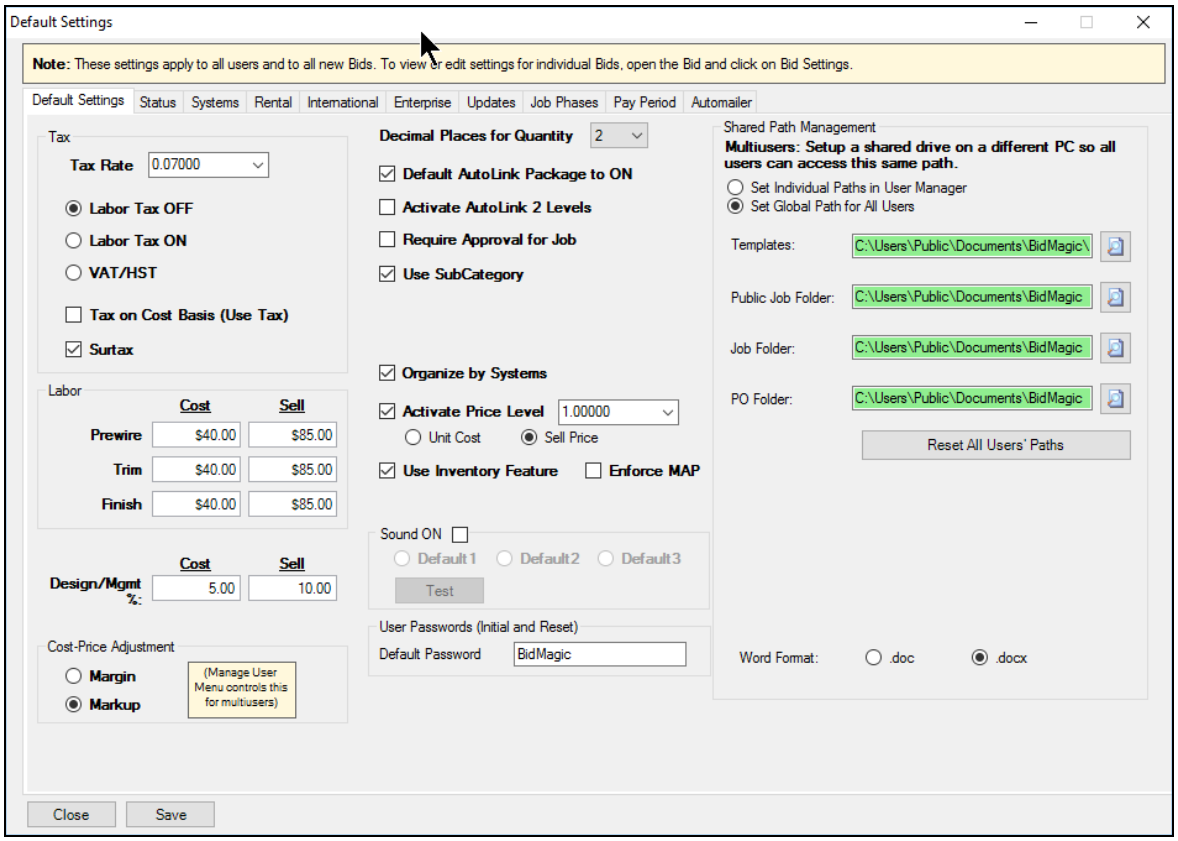
SETTINGS MENU

Default Settings (Global Settings for New Bids)

Before writing proposals, set your hourly rates for Prewire, Trim and Finish labor. (Pro/Enterprise users can edit labor phases or add more in the Phases Tab.) Set your default Design/Management rate and Sales tax rate. Set these values before creating proposals. If you wish to change rates for a bid in progress, do so in the Bid Settings. The Bid Settings displays the Design/Mgmt percentage for a bid and allows updating. If you want to charge a 10% fee for Design/Mgmt, enter 10 into the Sell box and be sure to also include a value for you cost. (Needed for accurate profit reports.) You can also add a percentage for sales commission to the Design/Mgmt Cost to include that in profit reports.



Profit Markup vs Profit Margin

BidMagic allows users to display either Markup or Margin. If you purchase an item for $100 and sell it for $300, the Markup would be 200%. Here is the formula: ((Sell Price - Unit Cost)/Unit Cost x 100). Plugging in our example $300 sell price - $100 cost = $200 Profit. Then 200/100 = 2 x 100 = 200% Markup. If you are not sure which one to use, choose Markup for simplicity.

The formula for Profit Margin is: (Sell Price – Unit Cost)/Sell Price. So, plugging in the values used above, ($300 sell price - $100 cost) = $200 profit /$300 sell price = 66% or 66 points Margin. BidMagic displays Margin in Profit Reports. You might want to use a calculator for this method.

Categories and Subcategories

Add, edit or delete the Categories and Subcategories of Products in your system. Default Settings let you decide if you wish to use Subcategories also. You must create Categories before you can assign products to them. You can create Audio/Speakers as a Sub Category if you desire to build 3 levels of product organization.

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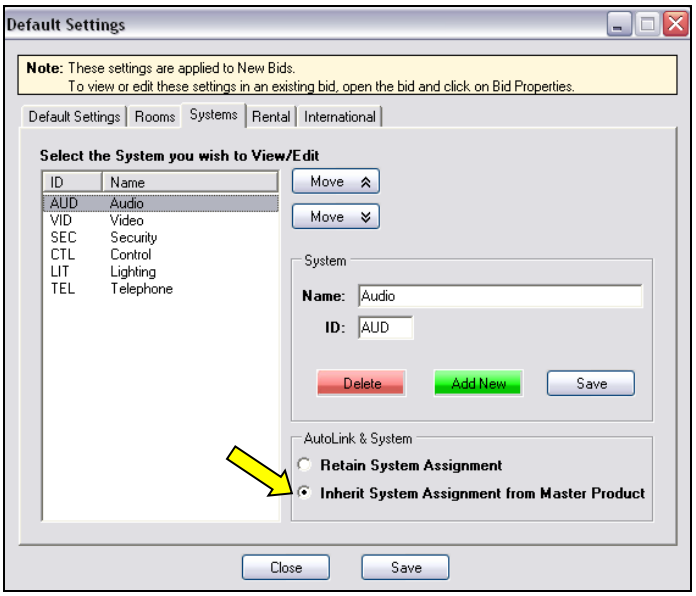
Organize by Systems (Pro/Enterprise Feature)
You can activate System features here for all new bids. When System features are active, you can add, edit and delete your systems list and set the order they appear in bids. If you use Systems, you will need to assign a system to all products in the bid. When using Systems with Autolinked Packages, choose whether the linked Products are added to the Bid with their preset System assignments or whether they inherit the System assignment from the Master Product they are Linked to.



Activate Price Level (Pro/Enterprise Feature)
Click this checkbox on any line item to adjust the sell price by the selected factor. Price Levels can be applied to the Sell Price or to the Unit Cost for a Bid. This gives powerful flexibility to the pricing process. For example, if the normal sell price is $100.00, clicking Price Level will change this to $90.00 if the price level is 0.9. It would change it to $120.00 if the price level for this bid is 1.2. Apply 1.4 to a Product cost of $100 to achieve a $140.00 adjusted Sell Price. This allows consistent global margins for all Products in a bid.

Enforce MAP
It is common for AV brands to have policies setting the minimum advertised price dealers set for their products. Checking this box will prohibit users from setting the sell price below the MAP when adding a product to a bid. Of course, users with permission can set the MAP in the Products page.

Shared Path Management
This is a very important area where you can set the paths to the folders containing the Templates, Job Folder and Purchase Order Folder. For sharing folders, we recommend assigning a shared Path, visible to all users. If you customize your paths, when you run a BidMagic software update, you will need to manually copy any new or edited templates into your chosen template folder. Note: The profit report will be saved to the users Windows temp file for privacy. If you wish, you always open the profit reports and use SaveAs to keep a copy in any location you choose. Enterprise users have the option to save profit reports into the private job folder.

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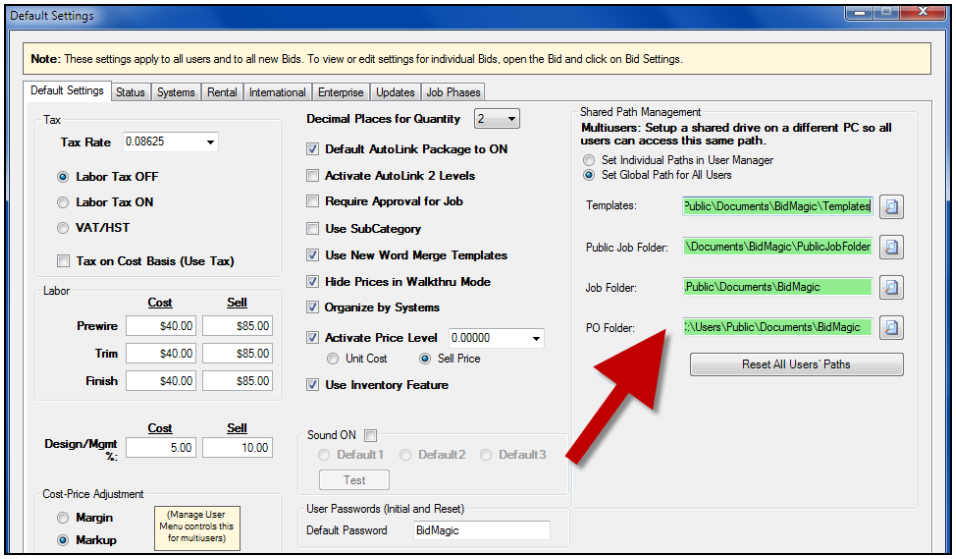

Here are the default paths with the subfolder structure. The Templates folder will automatically add a BidProposal subfolder where the templates are found.

Path Name	Path in Default or User Settings
Templates	C:\Users\Public\Documents\BidMagic\Templates
Job Folder (Private in Enterprise)	C:\Users\Public\Documents\BidMagic\JobFolder
Public Job Folder (Enterprise Only)	C:\Users\Public\Documents\BidMagic\PublicJobFolder
Purchase Order Folder	C:\Users\Public\Documents\BidMagic\PurchaseOrders

The paths can be set to a shared drive, network drive or IP address. This special method allows users to deploy reports to non-BidMagic users and use standard folder permissions to control user access to this information. Set the path to a network drive or a drive on a PC that does not run BidMagic so that the path is consistent.

We recommend that multiusers set up a separate drive in your office that is accessible to all multiusers via the same path. The reason for this is that the path to C:\Users\Public\Public Documents\BidMagic on one of the PC's running BidMagic, the path from another PC would connect to their own internal C: drive, not the desired location. If you reset your Job Folder or PO Folder path at any time, we recommend you copy the contents of the old folder into the new folder location, as BidMagic cannot do that automatically.

Set Template Path

We recommend setting the template path as C:\ Users\Public\Public Documents\BidMagic\Templates. BidMagic will add the BidProposal subfolder so the resulting path will be C:\Users\Public\Public Documents\BidMagic\Templates\BidProposal. If you customize your paths, when you run a BidMagic software update, you will need to manually copy any new or edited templates into your chosen template folder.

Please see additional info under Default Settings.
You can view and/or set the desired folder path to your templates. You can open this folder to see additional Templates that can be edited. For multi-users who wish to share templates we recommend setting the Template folder path to a shared folder that can be accessed by all users.

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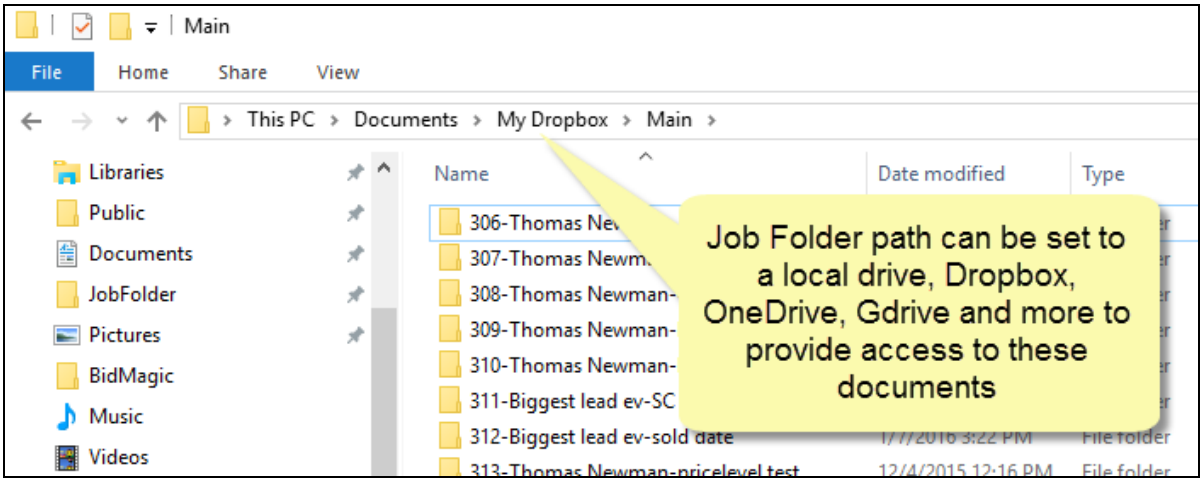
Set BidMagic Job Folder Path
Whenever you preview Client Bids, Installation copies and other reports, BidMagic saves copies into special Job folders in Word, Excel and PDF formats that can be shared with others who have access to the file path. The default root folder is C:\Users\Public\Public Documents\BidMagic. See Default settings and shared path management for more information on setting paths.



This folder path can be set to DropBox, OneDrive, Gdrive or other cloud locations for shared access by additional users. These folder path can also be edited to save documents on a network, shared drive or IP address. This special method allows users to deploy reports to non-BidMagic users and use folder security permissions to control user access to this information. Adjust the path to the location you want and provide access to the Job Folder to other users by managing their folder permissions on your network. Note: If you change your Job Folder path settings it will affect only new Bids and Service Tickets. Existing Bids and Service Tickets will continue to be found in path that was set and locked in at the time it was created. The Job Folder icon will always point to the current active path.

Enterprise users can also set a Public Job Folder path that receives PDF copies of these same documents (except the Profit Report) for additional personnel who need to view documents, but not edit them. Enterprise users will need to setup special network paths and apply rules for sharing and security permission settings to allow or deny users who need access to these folders. This is done outside of BidMagic.

Purchase Order Folder Path
Copies of Purchase Orders are automatically saved into the Purchase Order Folder when they are printed. The default folder location is C:\Users\Public\Public Documents\BidMagic\PurchaseOrders. Click on the PO Folder Icon to view your Purchase Orders. The paths for PO's are editable.

Shared Path Management
This is a very important area in Default Settings where you can set the paths to the folders containing the Templates, Job Folders and Purchase Orders. Multiusers can choose to set a global path for all users and manage the paths from this page. Click reset all user paths to update all users to the current paths. If set individual paths in User Manager is selected, the path choices will be made in the User Manager screen and cannot be changed in Default Settings. The paths can be set to a network, server or an IP address. This special method allows users to deploy reports to non-BidMagic users and use standard folder permissions to control user access to this information. Set the path to a network drive or a drive on a PC that does not run BidMagic so that the path is consistent.

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We recommend setting up a separate drive in your office that is accessible to all multiusers via the same path. The reason for this is that the path to C:\Users\Public\Public Documents\BidMagic\Templates on one of the PC's running BidMagic is not the same as thee path from another PC which would connect to its own internal C: drive, instead of the shared location.

Disclaimer: BidMagic accepts no responsibility for client network and security setup choices. Adjusting security settings can make computers more vulnerable to security breaches. We recommend that you utilize the services of an IT professional to setup firewalls, security settings, passwords and other technical requirements appropriate for your needs. Make security adjustments at your own risk.

Rental Features (Pro/Enterprise Feature)
You can activate rental features here in Default Settings for all new bids, or within the Bid Settings window for individual bids. Setup default multipliers for day, week, month, year terms. When rental features are active, additional boxes will appear for the rental duration. Custom1 rental is a special template for printing rental proposals that appears in Print Preferences when rental features are active.

International Features
You can turn activate Exchange Rate features. This allows you to automatically adjust for transactions involving foreign currencies. Checkboxes in Products allow you to choose which Products can have this adjustment added.

Enterprise Features (see the section on Enterprise Features below)

BID SETTINGS (FOR INDIVIDUAL BIDS)

This is a very important window containing the client info, the jobsite info and proposal status info for the current Bid. While Default Settings establish global choices for new bids, Bid Settings lets you view and edit these settings for each individual bid. Labor Cost and Sell Prices, Price Levels, Tax choices and Design/Mgmt percentage can be viewed and adjusted here for the current Bid. Design/Mgmt is entered as a percentage, so 10.0 would equal 10%. Be sure to enter a percentage for your cost. This can also be useful for overhead or for including the cost of sales commission in your profit reports. This value can be set up to 50%. These changes affect ONLY the Bid you have open. Also use this form to keep track of all the information regarding this proposal. By inputting the current status and date, sales reports can be created to see how many proposals are at what stage, which need follow up and give breakdowns by salesperson. Pro/Enterprise Features include tabs for General, Rooms in Bid (manages Room Descriptions), Systems in Bid (manages System order).

Set the Status to keep track of Bids that have been created, submitted, sold, Inactive, etc. Fill in this info for accurate tracking and Sales Reports. The Bid Name can also be edited here if needed.

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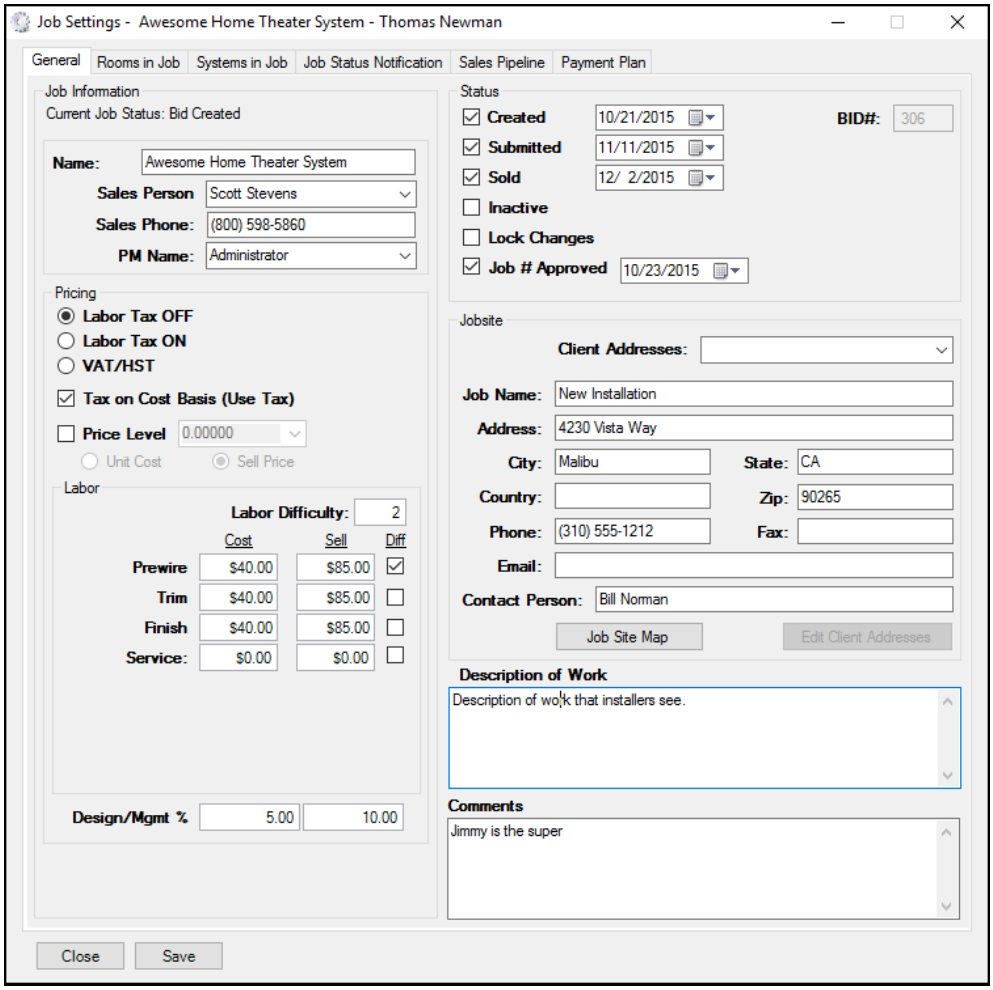

Bid Settings/General

This form keeps track of the taxes, price level, labor difficulty and Design Management for each Bid. This form also keeps track of when this bid was created, submitted and sold. Select a client address and fill in Description of Work which will be included in installation copies and appear on mobile devices. (optional) Comments appear in installer copies.

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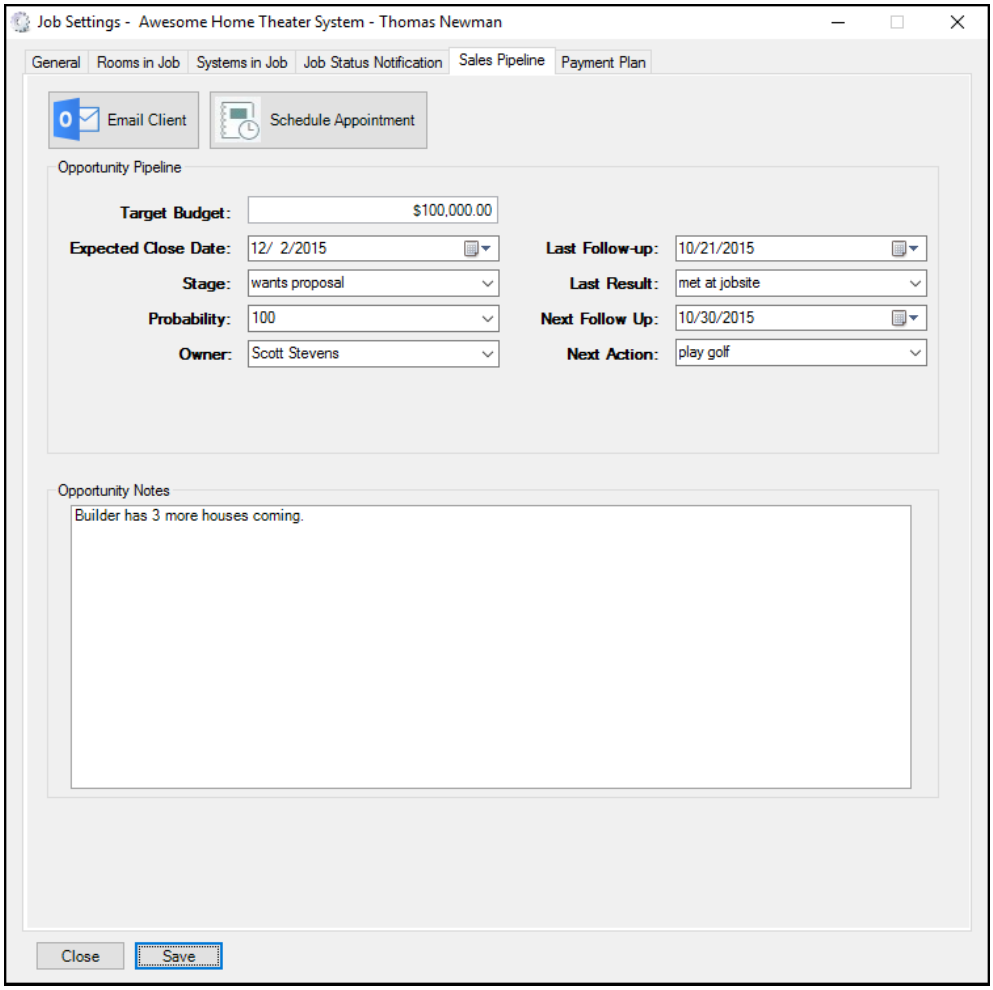
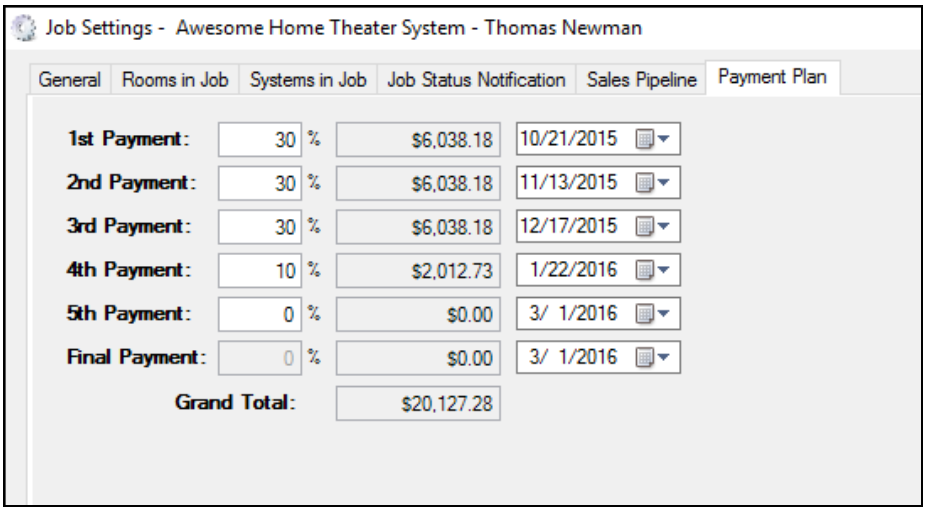


Sales Pipeline

This form tracks your sales pipeline and opportunity notes. You can select a date to call the contact back and include notes about what occurred on the calls. Pro/Enterprise users can also email the contact or schedule an appointment directly onto your Outlook calendar. Be sure to enter a target budget, expected close date and probability to close so that your pipeline can be graphed.



Payment Plan (Pro/Enterprise Feature)

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You can setup a payment plan with up to 6 payments and the due dates in Bid Settings/Payment Plan tab. If you enter a payment here, the form will require that all payments add up to 100% before leaving the form. You will need to choose a closing document that includes payment plan features in print preferences for the Client Bid.

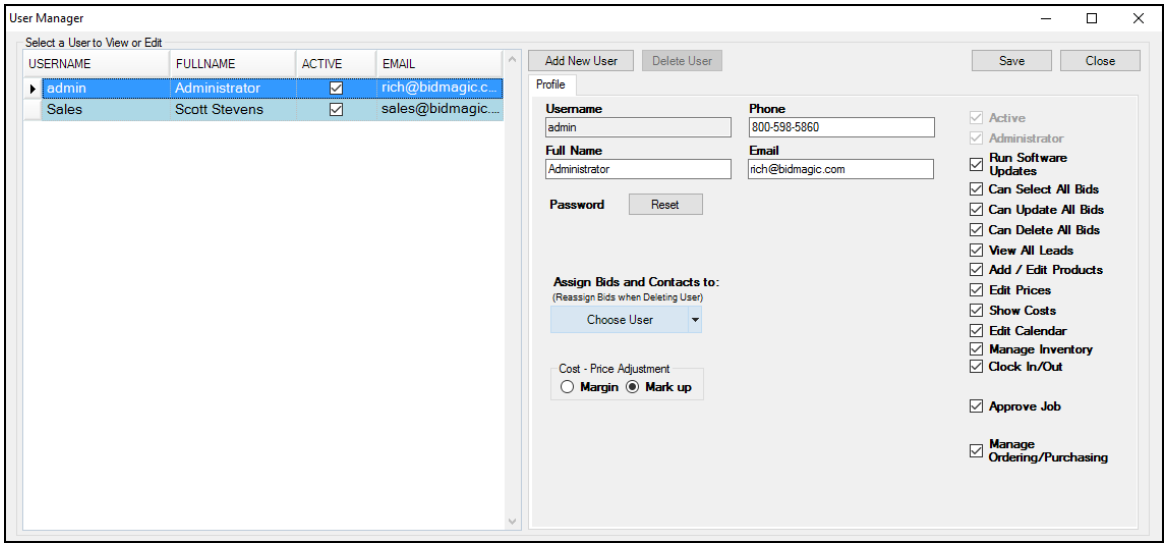
USER MANAGER (PRO/ENTERPRISE-MULTIUSER ADMINISTRATORS ONLY)

Pro and Enterprise version users generally are setup in Multiuser mode. Multiuser mode can be turned on or off by calling BidMagic support. This allows Administrators to setup additional users and set permissions to control which users can access which features. Each PC that has BidMagic installed requires a seat license. Terminal services and other multi-users installations require one license per user. Note: Remote desktop connections like LogMeIn or Parallels Access that take control of the screen of your PC do not require additional licenses when connected to a PC. Additional licenses are required for remote desktop connections to a server. If you wish to use the Admin login as your primary login, insert your name into the Full Name field to identify your bids and activities.

Add New User

The User Manager Screen is only visible to Administrators who can add new users and set access to features for each user. Users can also be deactivated here or have their passwords reset when needed.

The first time a new user logs in, they will need to enter the case sensitive default password: BidMagic, then input their own password. Administrators can change this default password in Default Settings. This allows assignment of passwords, logons and permission levels for each user. Administrators can manage these permissions to allow or disallow access to features listed here and on the additional Tabs. We recommend that only one or two users are designated as Administrators and are also given permission to run software updates. Note: Even on a single shared PC, you can add as many users and logins as desired in the User Manager, regardless of the number of active BidMagic licenses you have.



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USER PERMISSIONS (SET BY ADMINISTRATOR)

BidMagic provides the ability for an administrator to set up user permissions to allow or deny access to features. This gives management control over what users can do and see in BidMagic.

Run Software Updates
Allows a user to run software updates when they are available. Keep in mind that software updates will require all users to log off before beginning an update. Reserve this permission to one or two trusted managers.

Can Select All Bids
Allows a user to view all Bids in the system. View All Bids must be selected.

Can Update All Bids
Allows a view and edit all Bids in the system. View All Bids must be selected.

Can Delete All Bids
Allows a view and delete all Bids in the system. View All Bids must be selected.

View All Leads
Some organizations like to work with a pool of shared leads. Other organizations want their leads to be assigned to individual sales people. These choices are managed here. Administrators can allow or deny permission for each user to view all Leads in the system. Each user can manage their own contacts and import Contacts from MS Outlook. Leads are private by default but users with rights to View All Leads can also see them. Marking a lead shared will share the lead with all users, even those without permission to View All Leads. Note: Once converted to a Client, those users with rights to see a bid can also see and edit the Client associated with the bid.

Add/Edit Products
This allows a user to add or edit products in the master product list on the Products Tab. Enterprise users have additional features to create Adhoc or temporary products.

Edit Prices
This allows users to edit line item sell prices in a Bid.

Show Costs
This allows users to view the cost for products and labor and also view Profit Reports.

Edit Calendar
This allows users to make changes on the Calendar Tab.

Manage Inventory
Allows users to make adjustments to inventory.

Clock In/Out
This allows users to clock users in and out and make changes to the times reported. Reserve this for trusted managers.

Company Info
Enter information about your company as you want it to appear in BidMagic reports. Client proposals will contain this info, but the name and phone for multi-users will be based on the selected user.

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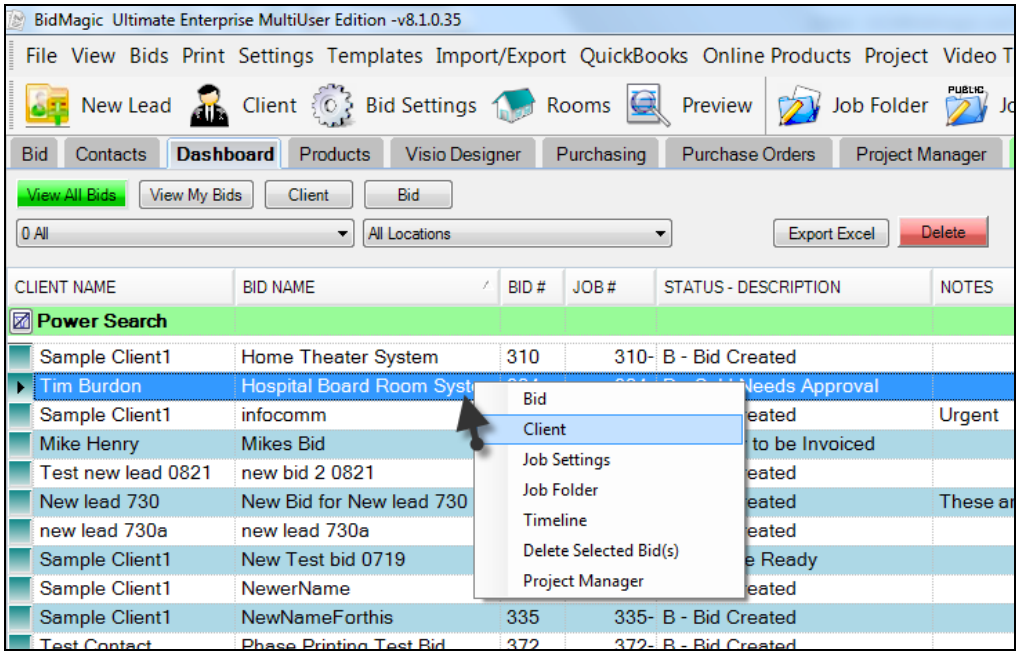
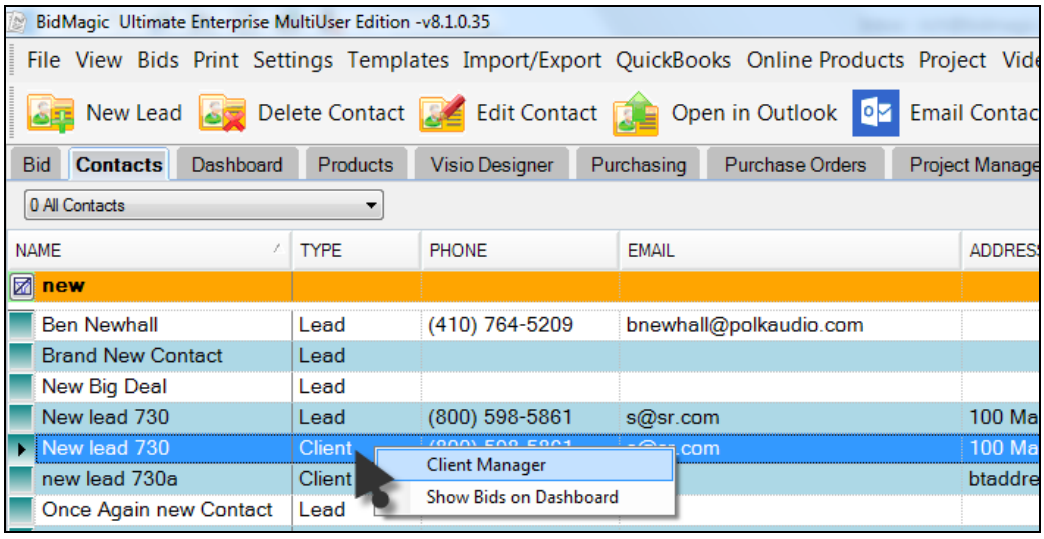
Enterprise users can setup multiple companies, departments or similar partitions that create multiple inventories in Default Settings. If you want to add your contractor license number, We suggest including the word “License:” in the entry box before your number. Example: License: 123456789.

Client

Client information is entered and maintained in the Client Manager. There is only one record per Client, so changes made to a Client record will appear across all Bids. There are three ways to open the Client Manager. 1. Open and Bid on the Bid screen and click on the Client icon at the top.
2. Right click on any line in the Dashboard and select Client from the dropdown menu. Enterprise users can keep track of multiple shipping addresses per Client.



3. Right click on a Client in the Contacts screen and select Client Manager from the dropdown menu.



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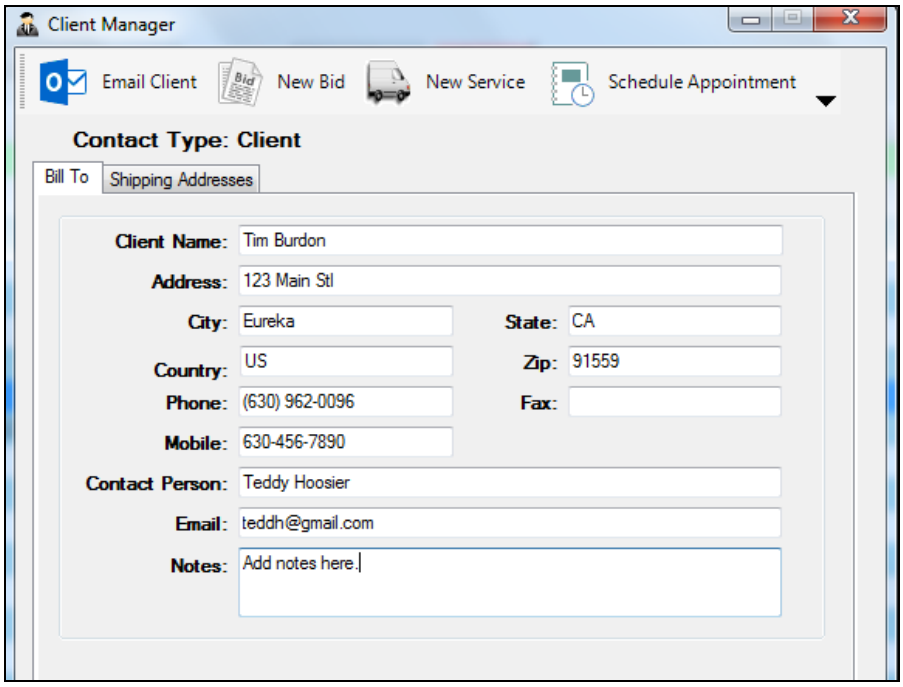
Opening the Print menu/Client Report allows you to export BidMagic contacts to Excel. You can also store sales Opportunity Pipeline data here to help you follow up with your Clients and set callback appointments. Contacts and are found on the Contacts screen.



Rooms
Add, edit or delete the list of Rooms in your system. These are used as headers in the printouts and can describe area, system, or other miscellaneous headers you wish. You can also type the name of a new Room in the Room box on top of the Bid Page for fast entry. Pro & Enterprise Versions list the Rooms in each Bid and allow Room Descriptions (scope of work, sales description) to be assigned to any room. Note: Select Rooms used in Bids to view or edit room descriptions. You can also right click on any room in a bid to open up the Rooms form.

Supplier
Enter and maintain contact information for your suppliers. This is used in Purchase Orders. You must create a supplier before you can assign products to it. Your account number for each vendor can be stored here. The email address is important if you want to email Purchase Orders directly to your suppliers, so enter the appropriate email here. When you add Products to BidMagic, you should select the preferred supplier for each product. When creating Purchase Orders, you can select an alternate supplier if needed. If a product does not need to be ordered from an outside supplier, list the supplier as 'None' and checkboxes to order these products in the Project Manager and Purchasing Screens will not appear.

Tax Rate
You can manage different tax rates you charge and add tax descriptions to identify the rates. Example: 0.085 - County Sales Tax. 0.00 – No Tax.

Sales Stage
Users can setup various sales stages such as qualified, interested, wants proposal, etc. Each stage can automatically set the probability to close to help graph sales pipelines.

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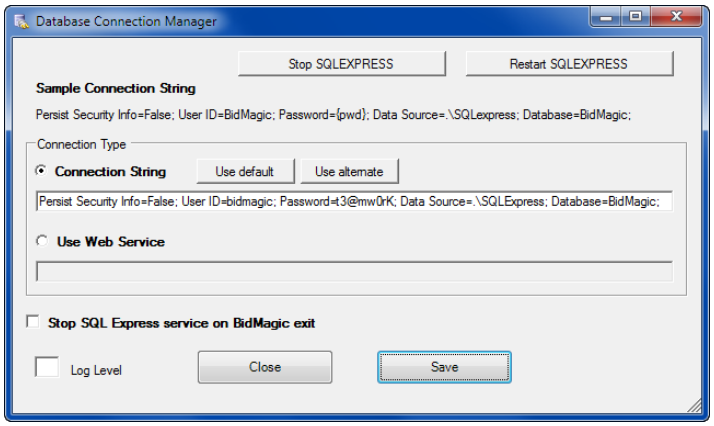
Price Level (Pro/Enterprise Feature)
You can manage different Price Levels that can be assigned to Bids. This can be used to make global adjustments to standard sell prices or be used to consistently set pricing above your cost. Set sell price and 0.9 price level for 10% off your normal sell price. Set cost and 1.7 to markup 70%. Each product in a bid can be chosen to be included or excluded from this price change. Be sure to check the price level checkbox for those products in the Products table that you want to automatically respond to price level adjustments when added to a bid.

Label Mapping – Customize BidMagic Screens and Reports
This powerful new feature allows user customization of all labels in BidMagic screens and reports. Now, users can easily rename PrewireHR to another name like Engineering, Labor1, Preparation, etc. This allows BidMagic to be used by all construction trades, including HVAC, landscaping, plumbing, windows, siding, etc. Users can relabel screen labels as needed by simply typing in a suitable replacement name (limited by available screen space). When rental features are active, labels for that mode appear on screen. Label Mapping also gives users the power to customize the labels in any of the reports.

Database Connection
BidMagic connects to SQL Server for database operations. We recommend installing BidMagic on a single PC that is always turned on and then creating a desktop shortcut for other PC's to connect instead of managing that connection here. Existing multiusers can share this database on a server or network location. This feature allows users to view or change the database connection. Do not change this setting unless you are instructed to do so by our support team. The SQL database connection must always be active to use BidMagic. Remote users can setup a VPN (virtual private network) to establish a connection to the SQL database. This is a robust connection even over a 3G cellular connection. Because BidMagic is running on the laptop, the user experience is better than in a remote desktop session like LogMeIn or GoToMyPC. Additional licenses are required for remote connections to a server.



Change Password
Administrators cannot see passwords for other users, but can reset a user's password when needed. The Default Setting screen shows the default password: BidMagic. When a user is added, or if their password is reset, this will be their initial password, which users must change when they first login to BidMagic.

TEMPLATES MENU

This opens the Microsoft Word templates so that you can customize them with your company name, logo, letterhead, fonts, colors, etc. Default Settings lets users choose to use the older XML template system (works with Word 2007) or the new and improved Merge Template system. (BidMagic version

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7.7 or newer - works with Word 2007 – 2016) and provides added customization features as detailed in the section named Customizing Merge Templates. Custom 2 places product images next to line items. Custom 3 and higher are included for pro version users. Do not change the template names, however, you can use the Label Mapping feature to relabel the names of Cover pages and Templates to change how they are displayed in the Print Preferences screen.

Default Settings let users choose to continue to work with the older XML templates or to switch to the new Merge Templates. Plan to edit the new customized templates. Note: you can choose to switch back if needed. Backup Templates are included. Please keep backup copies of any templates that you edit. Additional Backup Templates are available on our website, support page.

Cover 1-6
These Cover Page templates can be customized to choose for different types of Proposals. The Standard version includes one cover page. Pro/Ent versions include 6 cover pages to choose from. These feature stock images as a sample. Please replace these with images of your work or images you have rights to.

Custom 1
The most commonly used format, with blue bar headers, customizable.

Custom 2
This style places Product images on each line of the Proposal instead of grouping them at the bottom of the Proposal. Gold bar headers.

Custom 3 (Pro/Enterprise Feature)
Shows Price Each and Extended Prices. Headers are gold bars, customizable.

Custom 4 (Pro/Enterprise Feature)
Gold frame around page. White granite headers, customizable.

Custom 5 (Pro/Enterprise Feature)
Text only headers (without bars), customizable.

Custom 6 (Pro/Enterprise Feature)
Blue Bars, QTY, Model and Description on single line Client Info at top right. Custom 7:

Custom 7 (Pro/Enterprise Feature)
Blue Bars, Installed Price on each line item. Model and Description on single line Client Info at top right.

Custom Rental 1 (Pro/Enterprise Feature)
This style includes rental period (day, week, etc.) This option appears only when Rental Features are activated in the Default Settings/Rental Tab

Open Template Path (Access to All Templates)
Users can open the Template folder to view and edit the complete group of Templates used in the template system in BidMagic. These templates can be customized, but should not be deleted or renamed. There is a set of backup templates included named WordMergeTemplates_Backup.zip if you ever need a fresh template.

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Within the Template folder, there is an additional folder named Opening_Closing_Docs that includes a group of Word documents that you can use or customize to be part of your bids. You can copy and/or rename these documents to have multiple versions for different types of proposals and add them to the beginning or end of your proposals.

CUSTOMIZING TEMPLATES

Creating your own customized template is helpful because these documents contain your logo, fonts and style every time they are printed. Users can choose to use the older XML Templates or the current Merge Templates. Microsoft Word is required to view and edit Templates. Excel Templates are not user modifiable. These include Work Order, Client Report, Install Copy, Packing List, Profit Report and Sales Report.

BidMagic templates are fully compatible with Microsoft Word 2007-2016 and provide more editing flexibility. This system utilizes Word Merge fields to create Word documents ending in .DOC. This allows users to add or delete the data fields within the templates. Different instructions are listed later for older version templates.

From the Templates Menu you can directly open the following templates: Cover 1, 2, 3 and Custom 1 through Custom 7. Do not change the template names, however, you can use the Label Mapping feature to relabel the names of Cover pages and Templates to change how they are displayed in the Print Preferences screen.

Opening Templates for editing (Custom Templates)
Users can click the menu Templates to select and open Templates for editing with Word 2007-2016. This menu directly opens the Cover Pages, Custom Templates and more documents for editing.

Setting the Template Path
From Default Setting, click Set Template Path to view or change the path to the Template Folder. Templates are general found in C:\Users\Users\Public\Public Documents\BidMagic\Templates\BidProposal. Program Data is a hidden folder so you may need to set view hidden folders in your Windows control panel Folder settings. You may need to set security settings for your selected folders for BidMagic files. Users can change the location of this templates folder, but we advise using caution if you move them. Multiusers can choose to access the same shared templates by setting the shared path in Default Settings. (Admin only) See Shared Paths under Default Settings, above. Profit reports are not saved to these folders.

Open Template Path (Access to All Templates and Opening/Closing Documents)
Users can open the Template folder to view and edit the complete group of Templates used in the original and new template system in BidMagic.

Additional Merge Templates can be user modified and are stored in the Templates folder:
This folder contains all templates from both the original and new template systems. In this location you will find opening and closing documents, purchase orders, sales reports and templates from all other reports.

This folder also contains backup copies of the original templates in a zip file. This backup is named WordMergeTemplates_Backup.zip. We also recommend that you keep backup copies of any templates that you edit.

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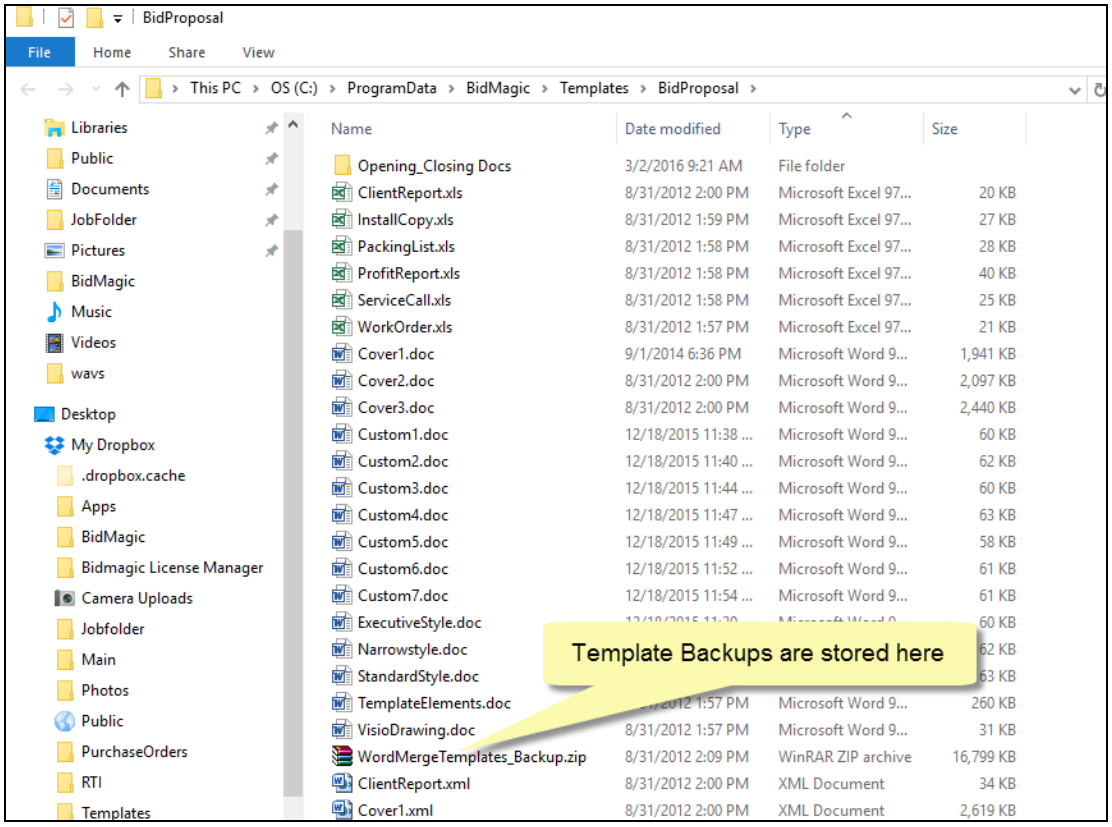

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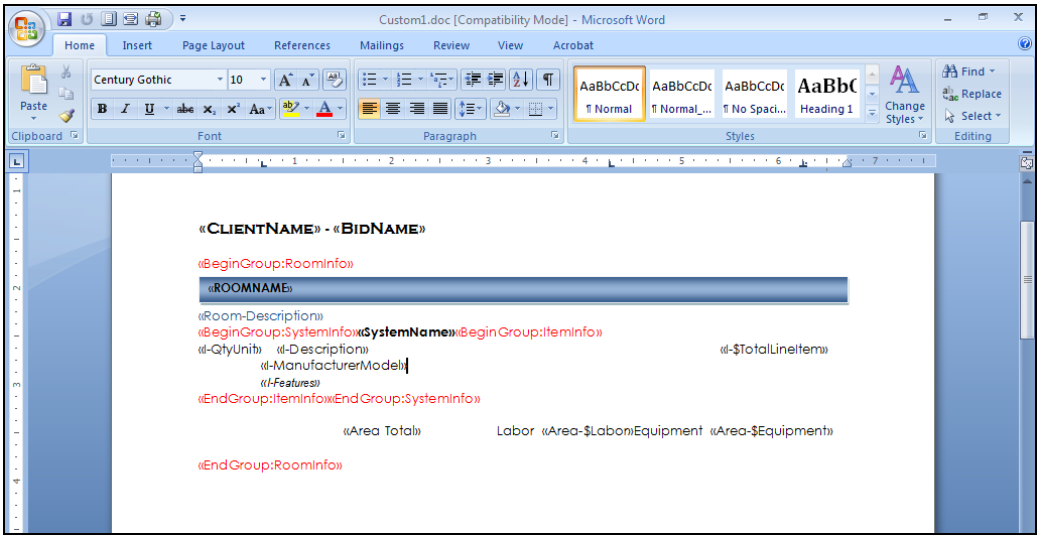
The MergeTemplate below shows the Merge Fields enclosed within double brackets. Here is an example: <<CompanyAddress>> Also note that almost all merge fields are contained within a group. Groups start with <<BeginGroup: and end with <<EndGroup: and are highlighted in red.

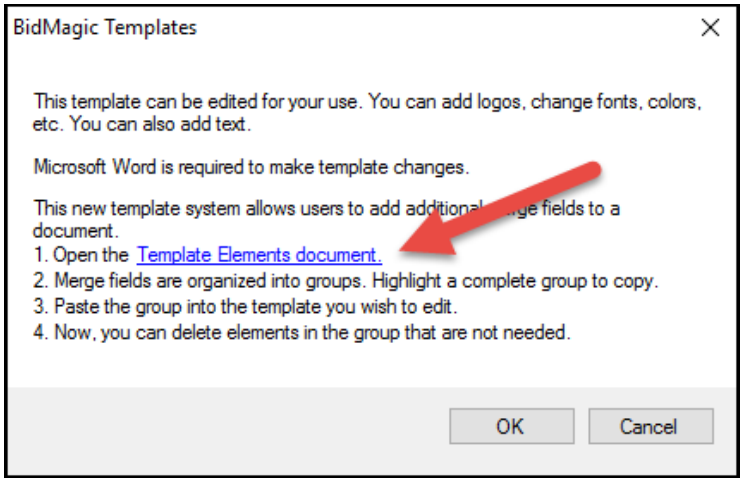


It is a simple matter to change the font, color, style and additional formatting using Word to make changes. Cut and Paste your logos and images into the new Merge Templates as needed. If you want to remove a merge field, highlight it and delete it. All text that is not within brackets can be edited very easily.

Adding Template Elements (Merge Fields) to Templates

This feature allows users to select additional data to include in a template. The Template Elements document is located under the Template Menu. This document shown below includes the complete list of all Merge Fields that can be included in a Template.

Before the Templates open, you will see the form below with instructions and a link to the new Template Elements document, which contains all of the merge elements that can be added to BidMagic templates and Opening and Closing Documents.



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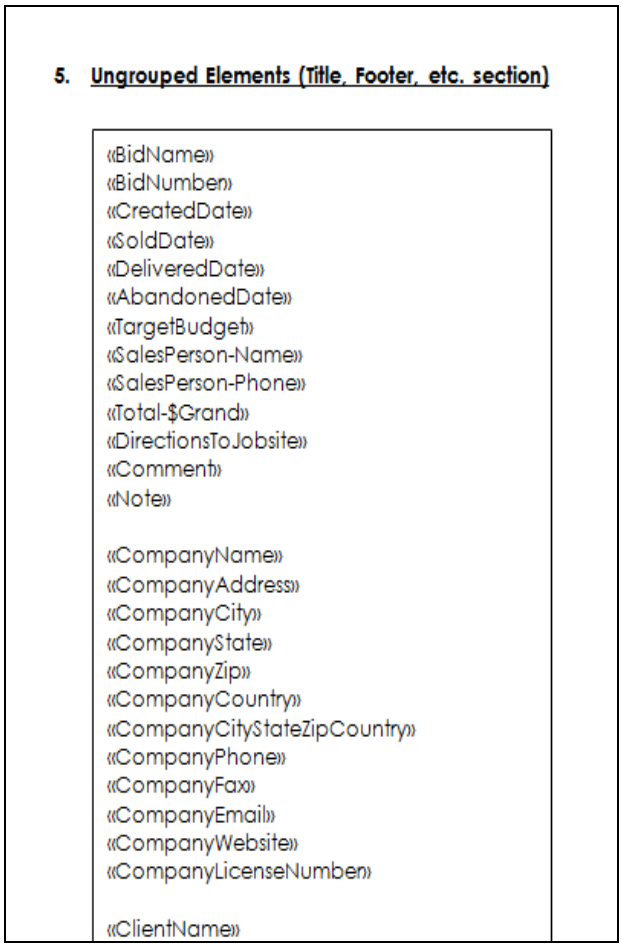
Ungrouped Template Elements:
Some Template elements are listed as Ungrouped. These elements can be copied as needed into a Template without requiring a group structure. Even a single Merge Field can be copied into Templates. If a Merge Field has no data sent to it from BidMagic, it will show as a blank space.

Note: Only the fields in the Template Elements can be used for this purpose. Just adding brackets to text does not create a Merge Field.

Labels can be edited for each Merge Field. We recommend backing up any Templates prior to making changes. Backup Template copies are available from support.



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The figure below shows ungrouped template elements and samples of data that they represent.

BidName	Family Room Additions
BidNumber	6
CreatedDate	12/14/2012
SoldDate	
SubmittedDate	
AbandonedDate	
TargetBudget	$55,000.00
SalesPerson-Name	keith
SalesPerson-Phone	(555) 123-4567
Total-$Grand	$2,388.45
Description of Work	Install Video System
Comments	Gated entry
Note	Karen is the caretaker

CompanyName	Elite AV Systems
CompanyAddress	3000 Wilshire Blvd
CompanyCity	Santa Monica
CompanyState	CA
CompanyZip	90230
CompanyCountry	
CompanyCityStateZipCountry	Santa Monica, CA 90230
CompanyPhone	(800) 598-5860
CompanyFax	(800) 222-2222
CompanyEmail	bob@eliteav.com
CompanyWebsite	www.eliteav.com
CompanyLicenseNumber	CA #1234567890

ClientName	Thomas Smaith
ClientAddress	10000 West First Street
ClientCity	Los Angeles
ClientState	CA
ClientZip	90001
ClientCountry	
ClientCityStateZipCountry	Los Angeles, CA 90001
ClientPhone	(323) 123-4567
ClientMobile	(323) 888-1234
ClientFax	(323) 999-1111
ClientEmail	tommy@email.com
ClientContactPerson	Tommy Jones

ClientCoName	Bright Lights
ClientCoAddress	4510 Goal Line Road
ClientCoCity	Los Angeles
ClientCoState	CA
ClientCoZip	90002
ClientCoCountry	USA
ClientCoCityStateZipCountry	Los Angeles, CA 90002
ClientCoPhone	(333) 123-4567
ClientCoFax	(333) 777-7777
ClientCoEmail	bobby@bright.com
ClientCoContactPerson	Bobby Franks

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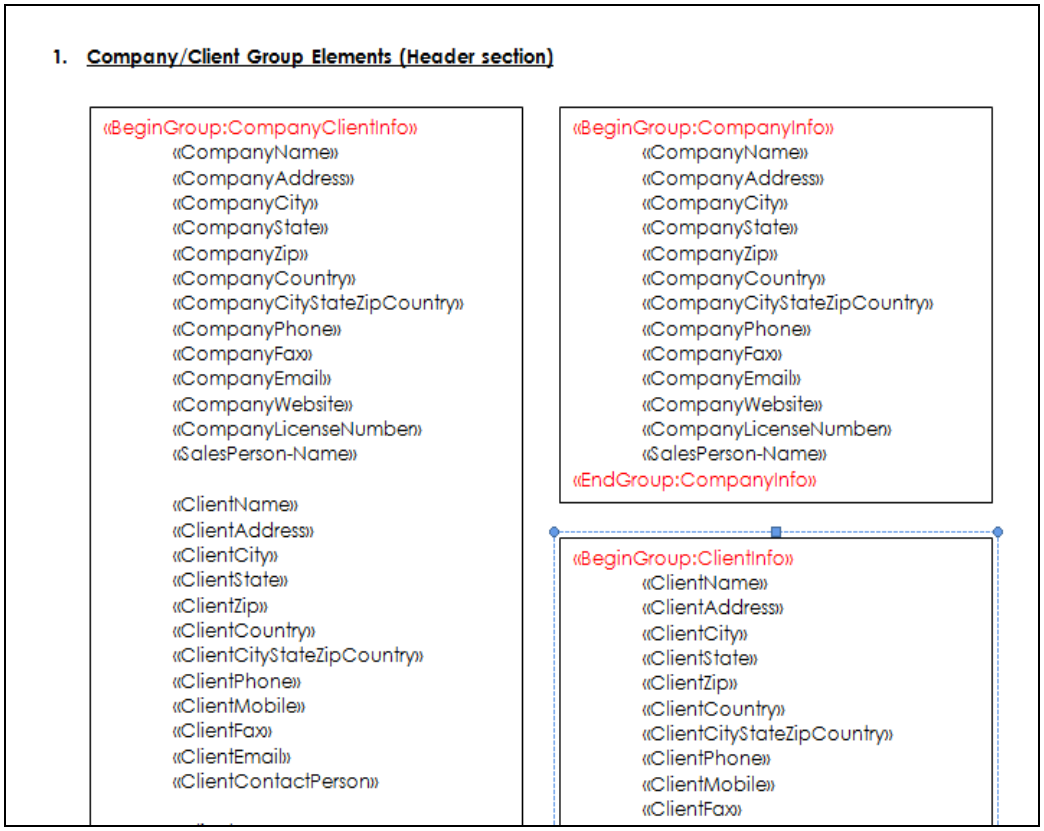
Grouped Template Elements:

Note that most Merge Fields, are contained within Groups. Note the <<BeginGroup:CompanyClientinfo>> example below. Merge Fields can be copied and pasted into any location in the Templates, but some elements must always be positioned within their assigned Groups! (Required for proper document structure.)

Be sure to copy the entire Group starting with the red BeginGroup and ending with the red EndGroup. Do not place a Grouped element outside its group. In some cases Groups are nested within other groups, so check the red markers carefully when adding or deleting merge fields.



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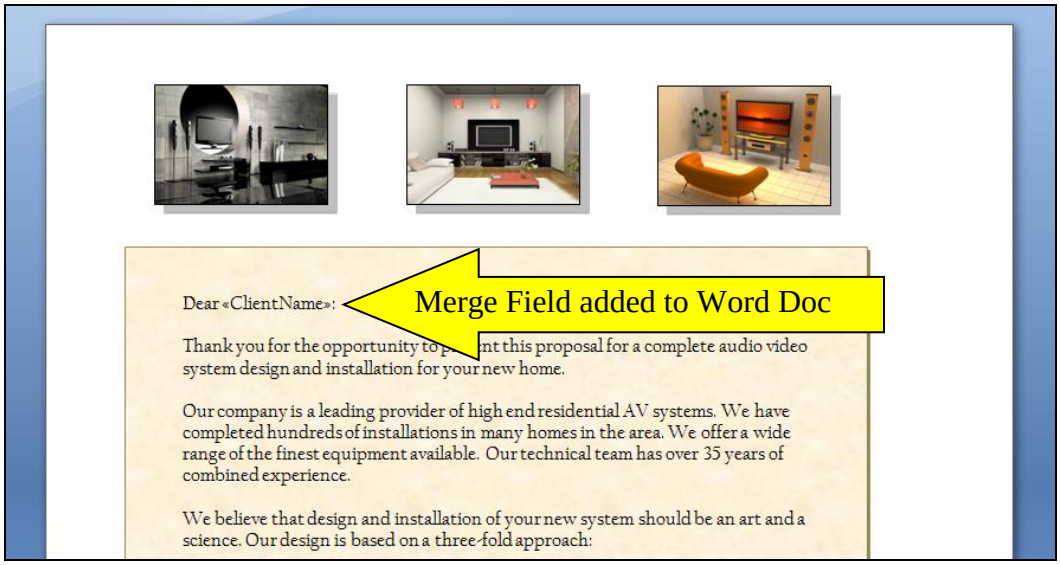
Adding Template Elements (Merge Fields) to Opening and Closing Documents

This new feature allows users to select additional data to include into standard word documents.e. The Template Elements document is located under the Template Menu. This document shown below shows t <<ClientName>> added to an Opening Document. This opens up many creative options for user customization throughout these pages in the Proposal.



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IMPORT/EXPORT MENU

Import Products CSV (Comma Separated Values)

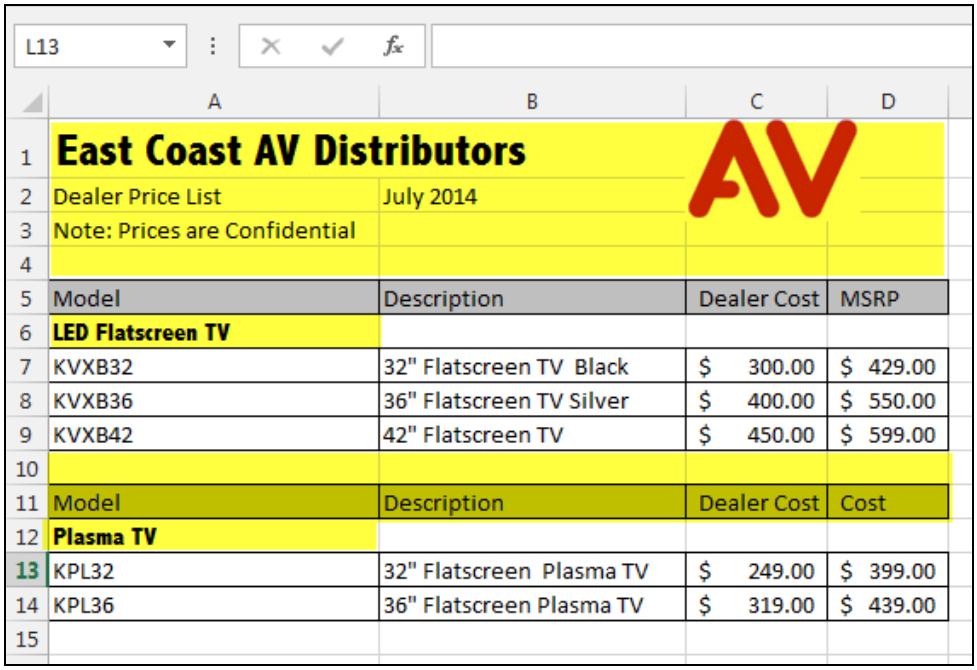
If you have product data in Excel, you can save time by importing them into BidMagic. Prepare your excel files and then save as CSV (Comma Separated Values) according to instructions in The Import Wizard helps assign your data to the correct locations in BidMagic. This Wizard has instructions on screen to assist you. Our latest excel import template can be found on our support webpage.

Preparing Excel Product Data for Importing

If you already have a database or spreadsheet containing products and pricing you can often save lots of time by importing that data into BidMagic. The first step is to configure an Excel CSV file for import. Make a copy of your file in Excel and inspect it for anything that is not product info. You might see cover pages, product group headers, etc. Delete those columns and/or rows that are not product data. If you see multiple dealer costs, select only the main cost that applies to you. Then add descriptive names to the column header names like Model, Description, etc. as shown below. Each product MUST have a model number and description. Currency fields must contain currency only. Other fields are optional. Do not use any odd characters like " ' . , : / ? [} in the top row. Delete any rows that are blank. After checking the data, in Excel, do a SaveAs in the CSV (comma separated values) format. You will see messages that some formatting will be lost, but click OK and proceed. Before making major changes to your Product Table, backup your work.

Common Problems with Excel Pricesheet Formatting

Below is a sample Excel pricelist that must be edited before importing. The elements highlighted in yellow are not product data and must be removed or moved. Row 1-4 does not contain product info and this top section must be deleted. Row 5 contains header names that must be moved to row 1. Row 6 is a category and does not belong in the Model column. Delete that row or create a new column named Category that contains that information beneath it. Delete Row 10 (no data) Delete Row 11 as it repeats Deletes the same header data from Row 5. Delete Row 12 or move to Category column. The end result is shown in the next image.



	A	B	C	D
1	**East Coast AV Distributors**			
2	Dealer Price List	July 2014		
3	Note: Prices are Confidential			
4				
5	Model	Description	Dealer Cost	MSRP
6	**LED Flatscreen TV**			
7	KVXB32	32" Flatscreen TV Black	$ 300.00	$ 429.00
8	KVXB36	36" Flatscreen TV Silver	$ 400.00	$ 550.00
9	KVXB42	42" Flatscreen TV	$ 450.00	$ 599.00
10				
11	Model	Description	Dealer Cost	Cost
12	**Plasma TV**			
13	KPL32	32" Flatscreen Plasma TV	$ 249.00	$ 399.00
14	KPL36	36" Flatscreen Plasma TV	$ 319.00	$ 439.00
15				

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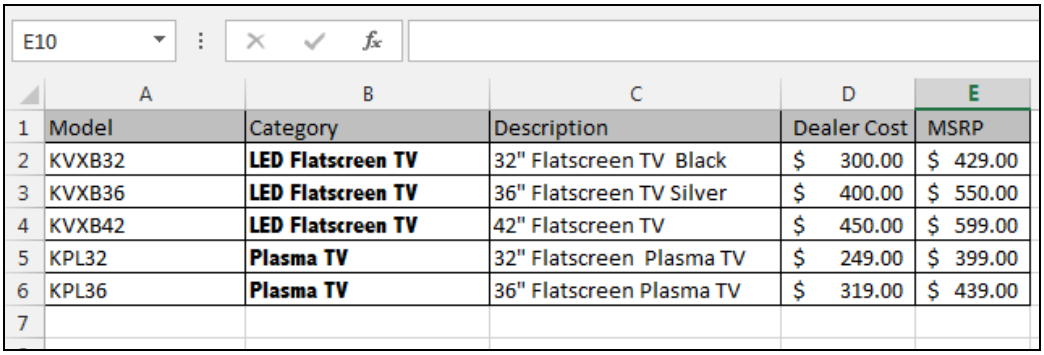
This Spreadsheet is Now Ready to Import

The first row contains descriptive headers. All other rows contain clean product data. To save time and effort, we recommend that you ask your suppliers to provide you with spreadsheets that are ready to import. Be sure to SaveAs CSV and close the file before importing.



E10

	A	B	C	D	E
1	Model	Category	Description	Dealer Cost	MSRP
2	KVXB32	**LED Flatscreen TV**	32" Flatscreen TV Black	$ 300.00	$ 429.00
3	KVXB36	**LED Flatscreen TV**	36" Flatscreen TV Silver	$ 400.00	$ 550.00
4	KVXB42	**LED Flatscreen TV**	42" Flatscreen TV	$ 450.00	$ 599.00
5	KPL32	**Plasma TV**	32" Flatscreen Plasma TV	$ 249.00	$ 399.00
6	KPL36	**Plasma TV**	36" Flatscreen Plasma TV	$ 319.00	$ 439.00
7					

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Some BidMagic Field Names:
BuyQTY
CableHard
Category
Depth
Description (required)
Discontinued (True/False)
Features
FinishHr
Height
Install
TaxAmount (True/False - do you charge tax for this equipment?)
isTaxLabor (True/False - do you charge tax on labor for this item?)
MAP
Margin
Markup
Memo
MFGName
MFGNumber
Model (required)
MSRP
Phase
PrewireHR
ProductUrl
Program
RU (Rack Units)
SellPrice
Supplier
System
TrimHr
Unit (Unit of Measure)
UnitCost
Updated
User1-4
Weight
Width
(subject to change. Check our product library web page for excel import template with our latest list of fields)

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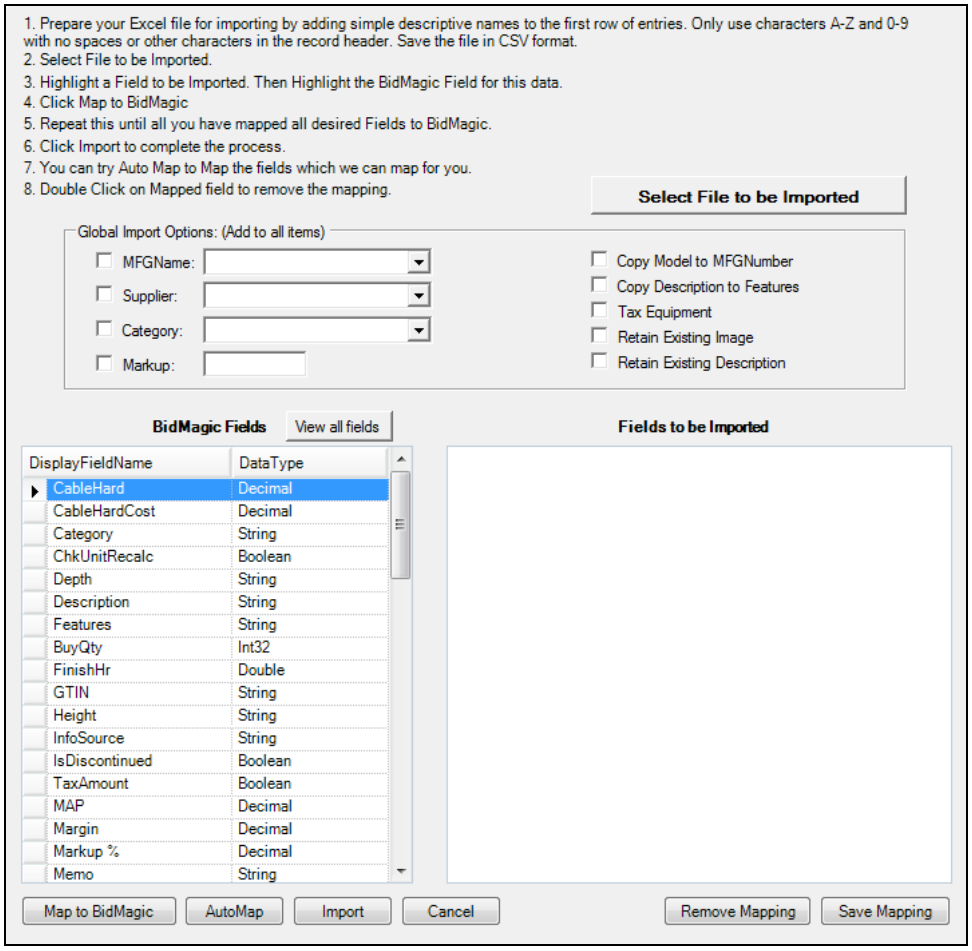
IMPORTING PRODUCTS WITH THE IMPORT WIZARD

Click on Tools/Import to open the new Import Wizard. Select details from the new data on the right and assign it to the desired filed in BidMagic on the left. Select data from the left and right, then click Map to BidMagic to assign the data. If all of your column headers are in the names listed above, the AutoMap feature will detect the correct data for you. You must assign a data field to map to Model in BidMagic. Map a value to SellPrice if the data includes that info.



Follow the onscreen steps to import an existing Excel CSV file into your products table. If your current products are in QuickBooks, our optional QuickBooks interface makes this a snap. If your product data is in another format, import into Excel first, then save the file in CSV format for importing. Note: The View all Fields button displays additional importable data fields.

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Global Import Options
To simplify importing, you can set global values for an import. If all products in the import are manufactured by Sony, enter that into MFGName and check the box. If all products should be assigned the same supplier category or markup, you can select to fill in that info globally. You can copy the Model into the MFGNumber if they are the same or copy the Description into the Features to simplify entry. If your imported fields contain data for these values, those values will override global choices.

EXPORT PRODUCTS

You can export complete Product Data including pricing to a standard CSV file. This file can be opened and edited in MS Excel. This export allows printing, editing, maintaining and sharing current products via Excel.

Export Products CSV (Comma Separated Values)
Allows Exporting to CSV which is helpful for editing or transferring. Note: These files DO NOT include Package relationships to Products. Use XML Import/Export for that purpose.

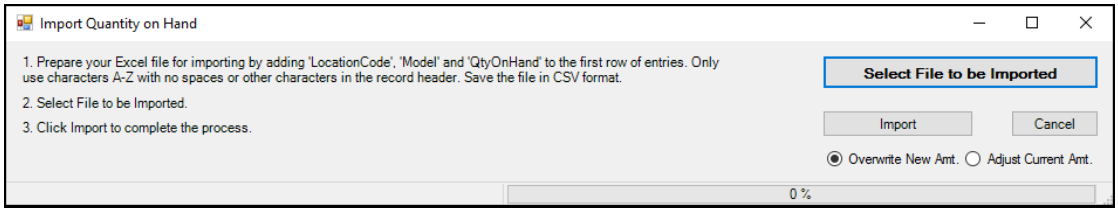
Export Bid (XLS)
Allows users to export a Bid to Excel.

Import Outlook Contacts (Pro/Enterprise Feature)
Allows users to import contact information into BidMagic. These contacts will not automatically appear in the Prospects Page, where they can be managed and upgraded to Clients when needed.

Import Products and Links (XML)
Allows users to import the complete Product list from XML format. This method is preferred and retains all Package relationships and Product Images. Note that ALL FIELDS in the XML may overwrite your product data.

Export Products and Links (XML)
Allows users to export the complete Product list to XML format. This method is preferred and retains Package relationships and Product images when sending updates to users who are not connected to your database.

Import Inventory (Optional feature - Included in Enterprise Version
Allows users to import Inventory quantity on hand. This is available for main inventory only.



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QUICKBOOKS DESKTOP INTERFACE (OPTIONAL)

Preparing to Connect to QuickBooks

Before using this feature, QuickBooks must be installed on the same PC with BidMagic. Be sure that you have properly setup your QuickBooks preferences for your company. We recommend that you consult with your bookkeeper, accountant or QuickBooks specialist to properly setup QuickBooks before attempting to sync with BidMagic. **Sales Tax preferences must be set to 'YES'** and **Inventory and Purchase Orders must be set to Active** to connect with BidMagic.

Minimum version of QuickBooks required

QuickBooks 2010 or newer
Must be Pro, Premier, or Enterprise Edition, POS (not Basic Edition or Simple Start)
Must be U.S. version (or Canadian 2010 or newer version) Any of the industry-specific editions are supported (i.e. Contractor, Non-Profit, Service, editions etc.) Windows 64 bit operating systems require the latest version of QuickBooks to connect.

CONNECTING TO QUICKBOOKS THE FIRST TIME

The first time you wish to connect, start by opening your company file in QuickBooks. The QB file can be on the same machine or accessed over a network. Once you have established this connection, you will not need to repeat this process again unless there is a connection problem.

You must be logged in as a **QuickBooks administrator** and be in **single user mode** to set this up. You will be prompted to choose how you wish to connect. For ease of use, we recommend choosing **'Connect to QuickBooks even when QuickBooks is not running'.**

In order to connect to QuickBooks for the first time, simply start QuickBooks to your desired company file (or know its location on your PC). You must have administrative rights to log into QuickBooks to setup this connection. When the application needs to communicate with QuickBooks for the first time, the following windows will appear in QuickBooks. You'll be prompted to allow the application to access your company data. Once setup, these windows will not appear again unless desired. Note that the windows may be slightly different on different versions and years of QuickBooks. For best synchronization, we recommend selecting Do you want to allow this application to read and modify this company file? You need to choose 'Login as Administrator' from the dropdown choices. The following Wizard will walk you through the first connection checklist.

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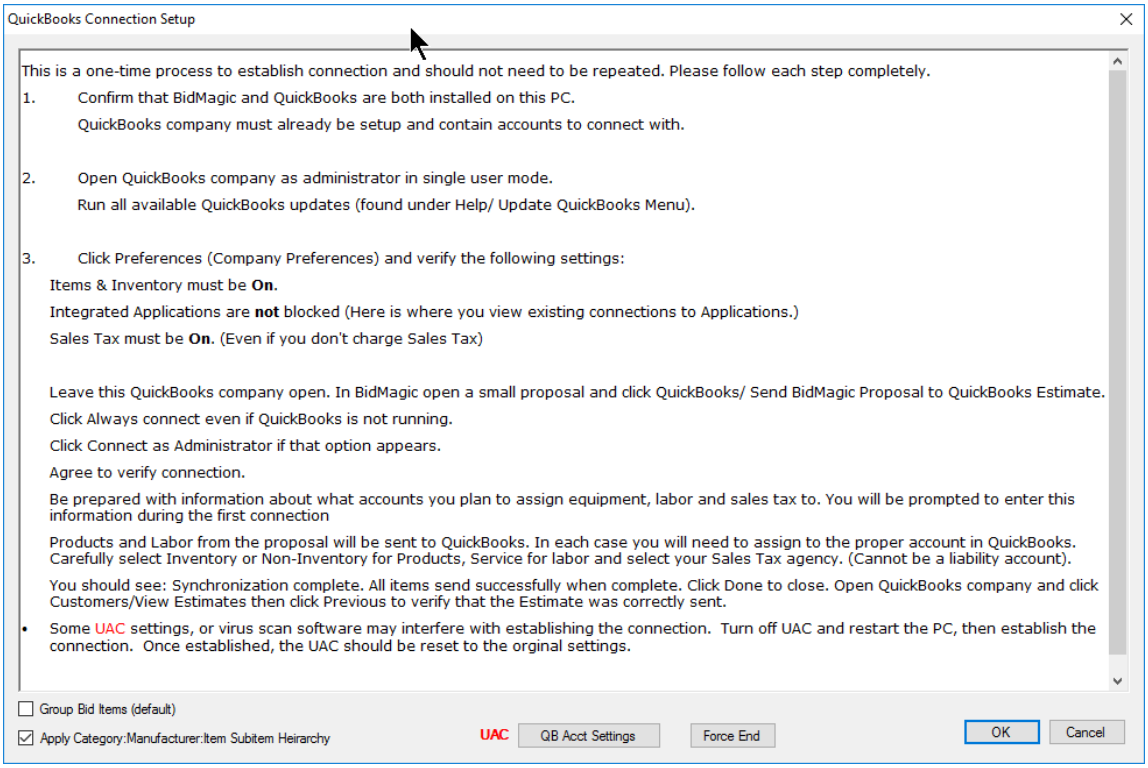

Apply Subitem Heirarchy to QuickBooks Items

Some QuickBooks users organize Items under Subitems for categories and/or manufacturers. A typical hierarchy would be Category:Manufacturer:Item. This would display as Audio:Sony:ES350. The good news is that BidMagic can import QuickBooks items and maintain that hierarchy. Check the box in QuickBooks setup if you wish to use this method.

Click on QB Account Settings to assign products and labor from BidMagic to the appropriate accounts in QuickBooks. It is important that you setup these accounts in accordance with the requirements of you bookkeeping practices.

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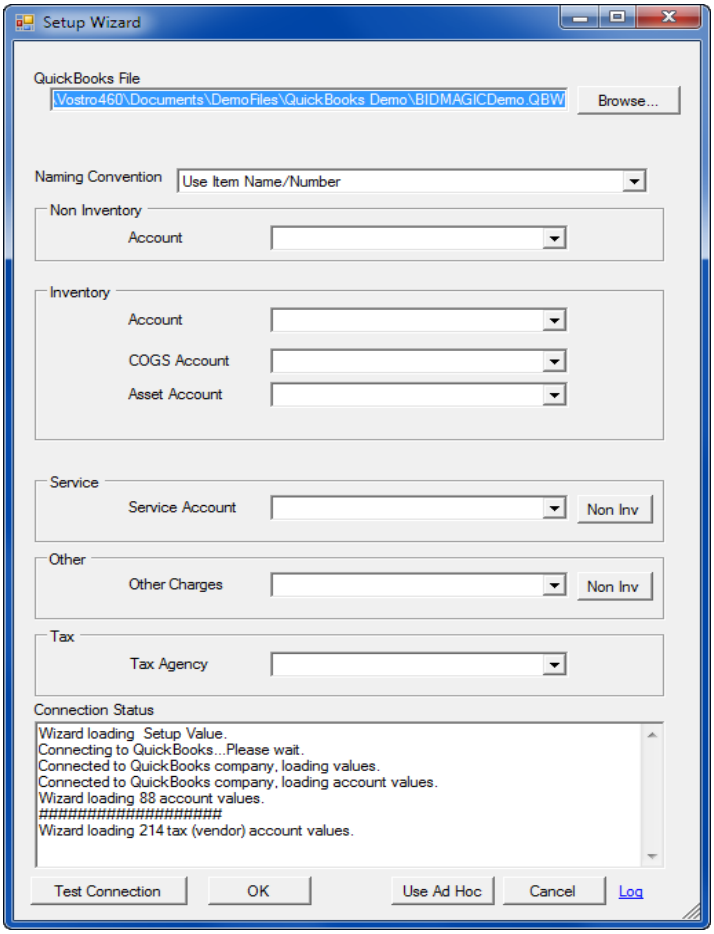
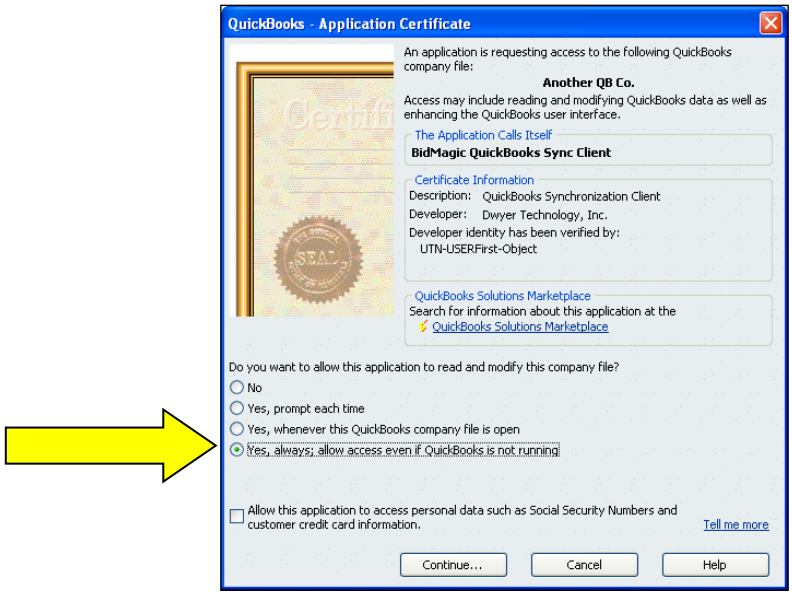


Application Authentication Form



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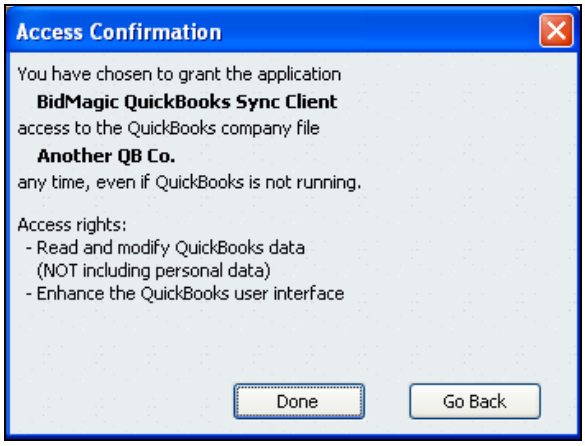
When the synchronization application was created, it was signed with a digital certificate providing assurances that its contents are authentic and have not been modified in any way since it being installed on your PC.

When the Data Access form is displayed, selecting the item to allow access even if QuickBooks is not running will allow you to perform synchronization operations even when QuickBooks is not currently running on your PC (this is the recommended setting). If not selected, you will need to make sure that QuickBooks is always running when performing a synchronization operation.

I Yes, always; allow access even if QuickBooks is not running
If you see the option Connect as: check the box to Connect as Admin



Confirmation form

The Access Confirmation window will be displayed to show a summary of the access that the application has with your QuickBooks data.

You can manage this connection is QuickBooks Edit/Preferences Menu. See the tab Integrated Applications where BidMagic will be listed and make sure the connection is allowed.

To start syncing with a different QuickBooks file, open that file in QuickBooks then open BidMagic and click on a QuickBooks function. The connection manager will reply that it cannot find the QuickBooks file and prompt you to choose the new file to connect to.

Be prepared with information about what accounts you plan to assign equipment, labor and sales tax to. You will be prompted to enter this information during the first connection.

If you have trouble connecting to QuickBooks the first time

1. Check to see if your version of QuickBooks is on our compatibility list and installed on the same PC as BidMagic. (Data can be there or elsewhere)
2. In QuickBooks, make sure you have sales tax turned ON in company preferences. (If your state or region does not charge sales tax, you must still turn this on. Set your sales tax rate at '0' so that no tax is charged.
3. In QuickBooks, make sure you have Inventory and Purchase Orders turned ON in company preferences.
4. Make sure you logged in as Administrator (Admin) and in single user mode the first time you attempt to connect.

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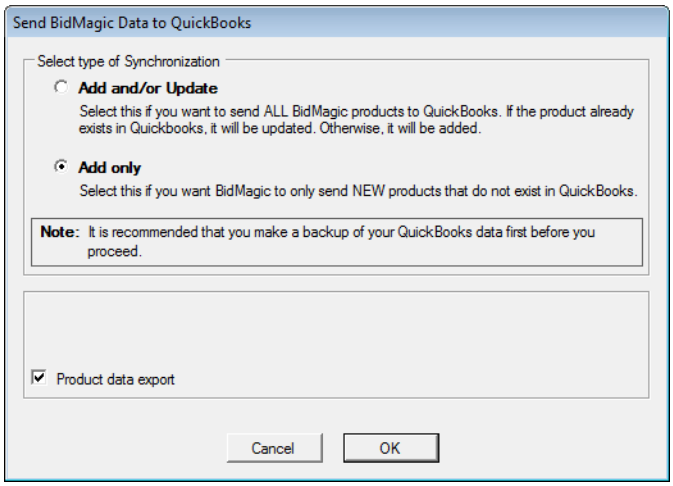
5. Vista users make sure User Account Control (UAC) is turned ON. This is found in Control Panel, User Accounts. Changing this requires a PC restart.

Send QuickBooks Data to BidMagic

This feature sends all QuickBooks Items, Customers and Vendors to BidMagic. After Products have been sent to BidMagic, it is best to maintain them there. The Product descriptions in BidMagic are far more powerful and detailed than in QuickBooks. The Products will be synced based on the BidMagic Model. Products in QuickBooks must have the same model number, but do not need all of the detail found in BidMagic. When sending new data to QuickBooks, you will be asked to confirm new items before they are added. QuickBooks Clients can be imported into BidMagic's Contact screen. Information in the QuickBooks Manufacturers name cannot be send to BidMagic. You can select Clients, Suppliers and Product Import.



If you have created subitems and sub/subitems to organize your Items in QuickBooks, these items will be individually sent to BidMagic in the following hierarchy: QB Item only equals BidMagic Model.

If you have 2 tiered subitems (Sony: KV42XBR3) that will be divided and sent to 2 fields of MFGName/Model.

If you send a 3 tiered item (Video:Sony:KV42XBR3), then it will arrive in BidMagic in 3 fields of Category/Manufacturer/Model. The QB Item name will show in BidMagic and will stay in sync even when the QB Item and BidMagic Model references are different!

Send BidMagic Data to QuickBooks

This feature lets you choose to send Clients, Suppliers and Products from QuickBooks to BidMagic. After Products have been sent to BidMagic, it is best to maintain them there. We recommend backing up your QuickBooks data before doing this. This feature sends Products to Items in QuickBooks. You can choose to send Items that are not currently in QuickBooks or All Items. Sending All Items will update the cost, sell price and description in your existing QuickBooks Items. It will not change accounts or other details. When sending new Products (Items) to QuickBooks, you will be asked to confirm new items before they are added and you will see choices to send only new Items or update existing Items in QuickBooks. You can also choose to include or exclude Products (Items). Keep in mind that BidMagic can store more product data than QuickBooks, so only data that can fit in QuickBooks can be sent. QuickBooks Inventory items can contain product cost.

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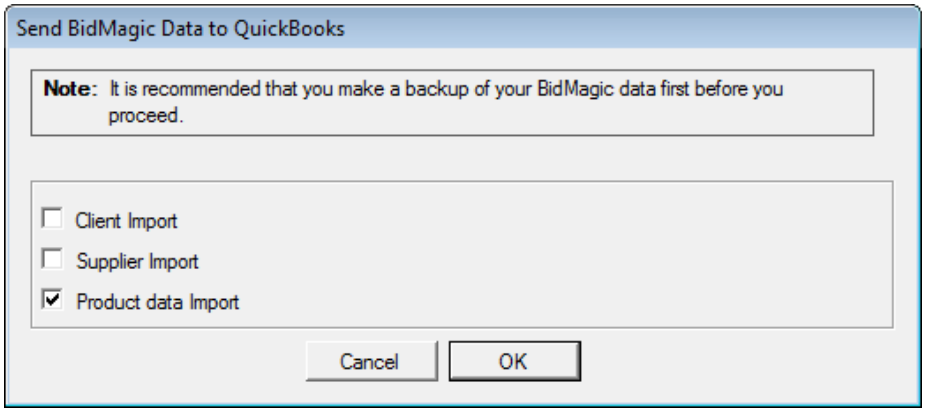
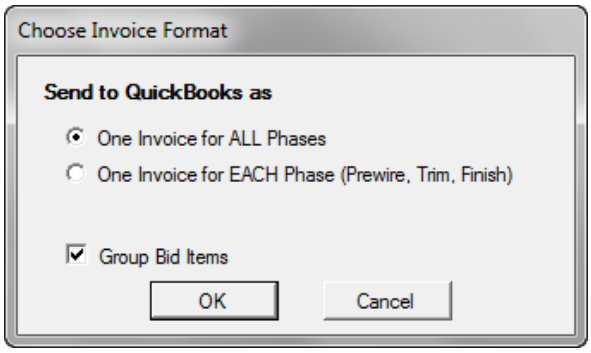


Send BidMagic Bid to QuickBooks Estimate
This feature sends the currently open Bid to a QuickBooks estimate. This includes the Job, the Client and the Products in the Bid. This does not update existing QuickBooks items. You can create a single Estimate from the bid or choose to create 3 Estimates – one each for Prewire, Trim and Finish Phases. (Some QuickBooks experts prefer this approach, for automatic progressive billing calculations.) Purchase Orders can be tied to Estimates for effective job costing. If you want the Estimate to show a summary of all items, without breaking out per room, check the Group Bid Items checkbox. Caution: If you choose to Group Bid Items, and if the same Model number occurs multiple times in the Bid multiple times with different descriptions and/or prices, QuickBooks will combine these items into one and override any differences.

Send BidMagic Bid to QuickBooks Invoice
This feature sends the currently open Bid to a QuickBooks invoice. This includes the Job, the Client and the Products in the Bid. This does not update existing QuickBooks items. You can create a single Invoice from the bid or choose to create 3 Invoices – one each for Prewire, Trim and Finish Phases. (Some QuickBooks experts prefer this approach for automatic progressive billing calculations.)
If you want the Invoice to show a summary of all items, without breaking out per room, check the Group Bid Items checkbox. Caution: If you choose to Group Bid Items, and if the same Model number occurs multiple times in the Bid multiple times with different descriptions and/or prices, QuickBooks will combine these items into one and override any differences.

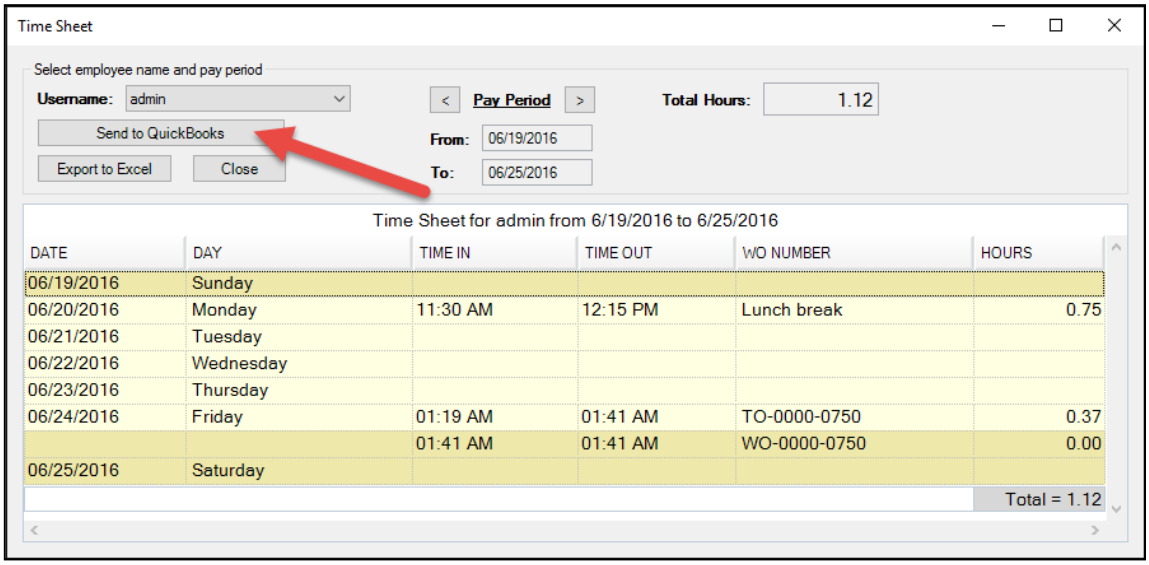


Send BidMagic Bid to QuickBooks Sales Order (Enterprise & Premier Only)
This feature sends the currently open Bid to a QuickBooks sales order. This includes the Job, the Client and the Products in the Bid. This does not update existing QuickBooks items. You can create a single Sales Order from the bid or choose to create 3 Sales Orders – one each for Prewire, Trim and Finish Phases. (Some QuickBooks experts prefer this approach.) See cautions above regarding Grouping Bid Items when they are not the same.

When a Bid is sent to QuickBooks, it will also bring the current Client, Vendor and Product information associated with that Bid to QuickBooks. The interface will prompt you to choose account for the new items. Please check with your bookkeeper or accountant to determine which accounts to assign new products to.

Send Bid to QuickBooks Purchase Orders
This feature sends the currently open Bid to QuickBooks Purchase Orders. This creates a separate PO for each Vendor needed for the selected products. This includes the Job, the Client and the Products. Options include adding a Vendor Message, Selecting the PO Number and Show or Hide your product costs. Because it is common practice for Vendors to offer differing prices based on quantity discounts or other quotas, we do not recommend including this cost information. QuickBooks also provides the option to show or hide your cost by customizing the PO form. Users have the additional option to print PO's in BidMagic and also send them to QuickBooks.

Send Timesheet to QuickBooks
This feature sends the selected timesheet from BidMagic to QuickBooks. The timesheet will reference the employee, client and job information. The timesheet may contain travel that will also be associated with the job. Additional activities like lunch, shop time, training, etc. can also be sent to QuickBooks so the employee can record these events. These are sent to the QuickBooks time card but are not referenced to a particular job.



Job Costing Tips for QuickBooks
Contractors who deliver goods and services over a period of time must pay special attention to tracking job costs. Profit and Loss statements are meaningless without reconciling equipment costs and labor costs over time. We recommend working with experienced QuickBooks professionals to correctly manage this important process. BidMagic makes the process easier, especially when creating Purchase Orders and splitting them by equipment phase and vendor. QuickBooks Premier and Enterprise Versions include additional features for managing purchase orders and job costing.

Basic steps to QuickBooks job costing.
1. Create Items including cost and sell price for products and labor you sell and associate with QB accounts.

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2. Create an Estimate or Invoice in QuickBooks with the items sold.
3. Create Purchase Orders for the items (one per vendor) and select the job to bill against.
4. Receive products into inventory.
5. Allocate products to the job and verify the cost.
6. Setup employees and enter timesheets for hours and associate with each job.
7. Open Reports: Job, time, mileage and view results.

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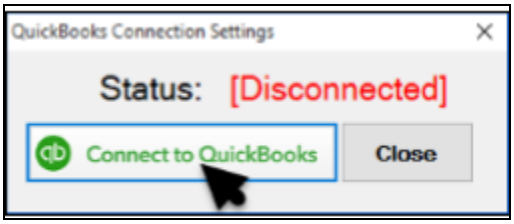
QUICKBOOKS ONLINE INTERFACE (OPTIONAL)

Send BidMagic Bid to QuickBooks Online Invoice or Estimate This feature sends the currently open Bid to a QuickBooks Online Invoice or Estimate. When a Bid is sent to QuickBooks, it will also bring the current Client, Vendor and Product information associated with that Bid to QuickBooks.
The interface will prompt you to select the account for all new items. Please check with your bookkeeper or accountant to determine which accounts to assign new products to. You must have a sales tax agency account to apply sales tax to. This process will add new items to QuickBooks, but does not update existing QuickBooks items. If you attempt to send a Bid for a second time, you will be prompted whether you want to void the previous Invoice or Estimate.
If you assign equipment order phases and labor phases to the products in BidMagic, you will have the option to create 3 separate invoices or estimates (one each for prewire, trim, and finish phases.) Some QuickBooks experts prefer this approach for automatic progressive billing and job costing calculations. Custom phases are not supported in sending to QuickBooks. These invoices and estimates will include the equipment delivered at that time, the labor performed, shipping, design/management and any other fees needed at that time. Note: Rules for splitting are found under Print Preferences.

You also have the choice to combine bid items. Let's say your bid has a total of 12 pairs of speakers spread throughout many areas of the bid. Choose this option to combine all 12 into a single line item in the Invoice or Estimate. Caution: Do not choose to Group Bid Items, and if the same Model number occurs multiple times in the Bid with different descriptions and/or prices. QuickBooks will combine these items into one and override any differences, which is not what you want.
Send BidMagic Data to QuickBooks Online This feature sends all products in BidMagic to the QuickBooks item list. You will have the choice to add just new products or to also update existing products.

The optional interface allows access from any PC running BidMagic. (License required)
How to Connect to QuickBooks Online: Step 1. You must have an active QuickBooks online account setup and working first. Your PC must be licensed to access the QuickBooks online connection via BidMagic. Sign in to your QuickBooks Online with your user name and password. Then open BidMagic and click the QuickBooks Online Menu/ Setup QuickBooks Online Connection. Click the Connect to QuickBooks button then click Authorize to establish the Connection process. That's all there is to it.



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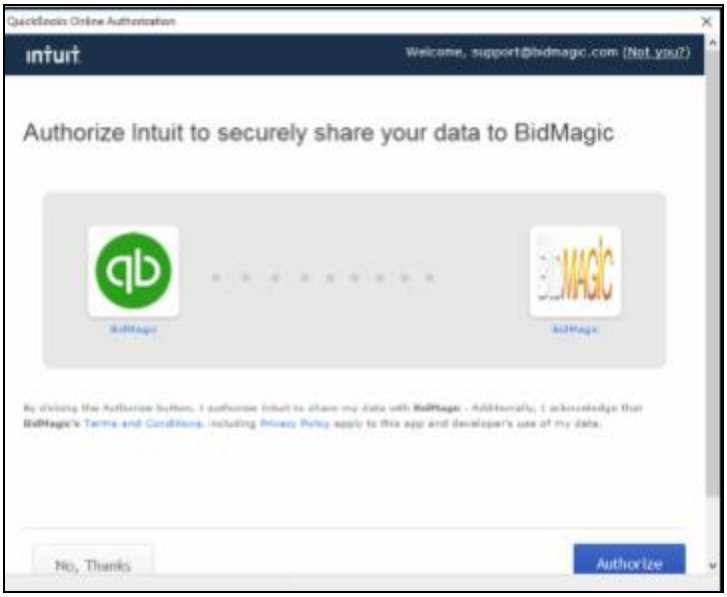

BIDMAGIC ONLINE PRODUCT SEARCH TOOLS (OPTIONAL SUBSCRIPTION)

Acquiring product data from hundreds of manufacturers and keeping it up to date is a daunting task for installation companies. Our users have asked us to help them keep their Products and Prices up to date. BidMagic makes it easy to search thousands of Products and then pick only the Products you want to carry. Multiusers can only see or access the Online Products Menu if they have been granted permission to Add/Edit Products. You have the option to subscribe to the BidMagic Online Product Search Tools on a yearly basis. After adding a product to your local database, it will remain there even if you do not renew your yearly subscription. Please contact sales for more information or to purchase.

Online Products

The Multi-Column Search makes it easy to select Suppliers, Manufacturers and Categories to locate products. Choose Text Searches to enter specific search criteria. Your search will show more products when all Categories are selected. However, for best results, pick a few Manufacturers at a time rather than checking all, which may return 20,000 or more results on multiple pages. Then click Next to see the results.

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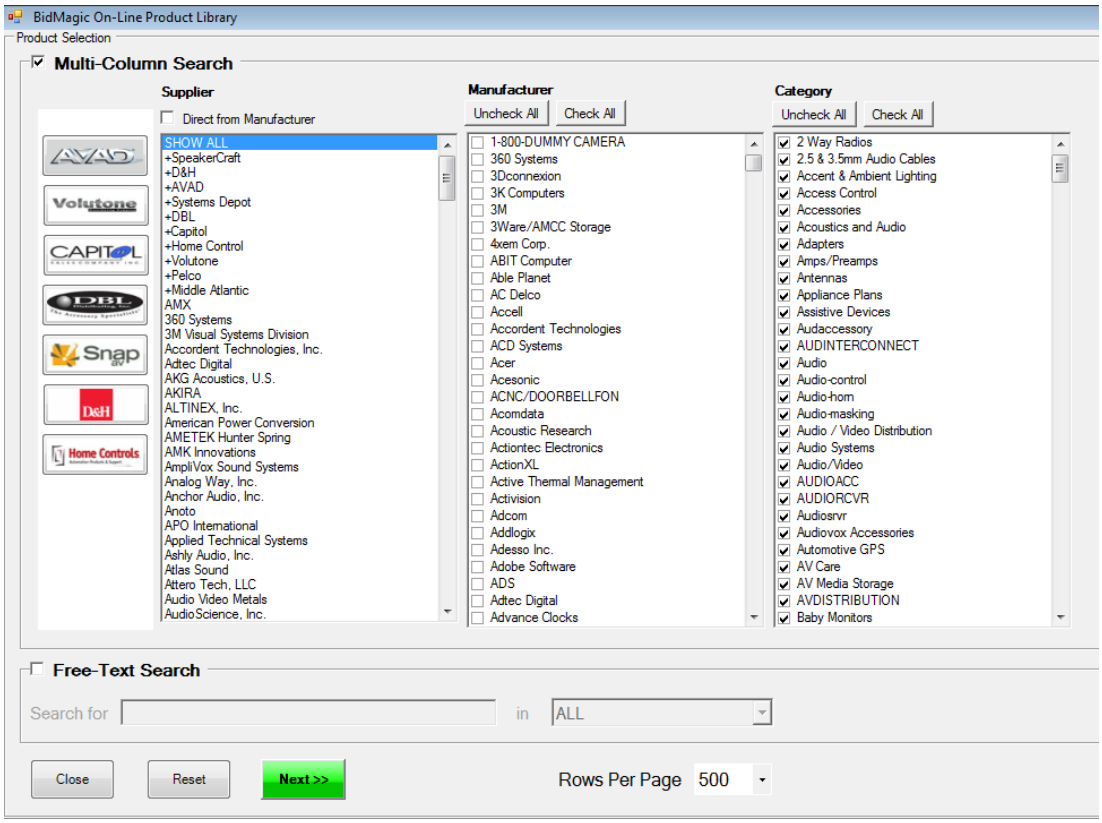

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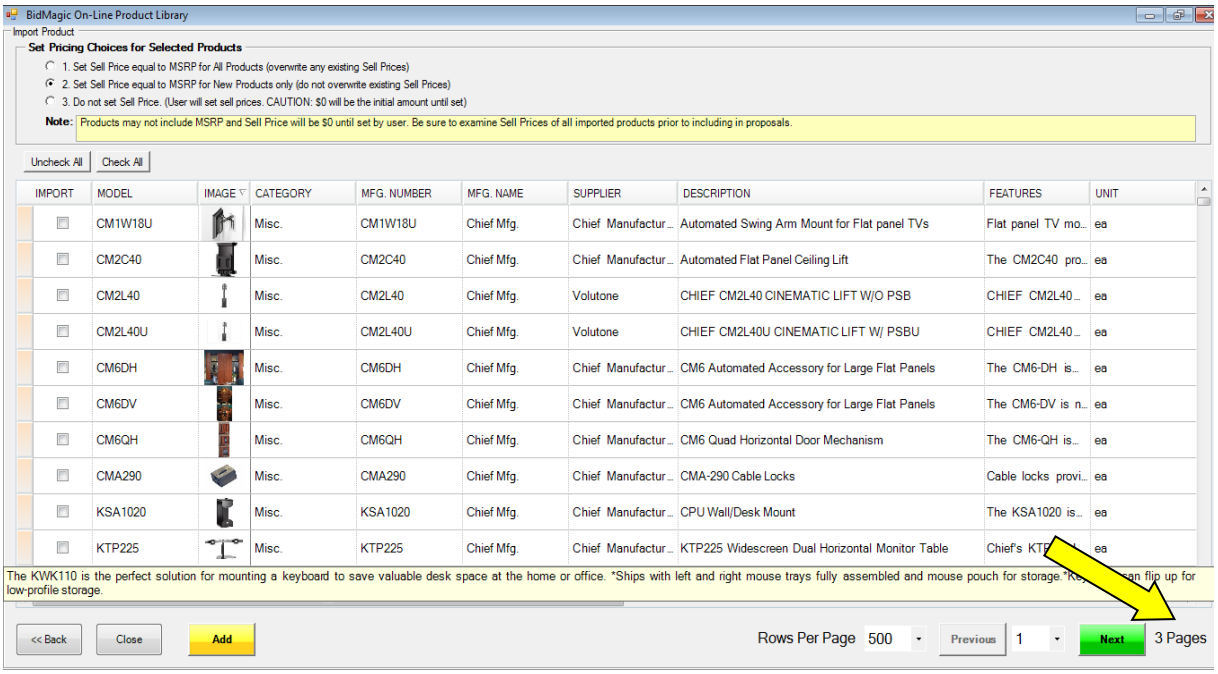
View and Choose from Selected Products

The next screen displays your search results, with up to 500 products per page. Check the products you want to add. Be sure to navigate through all of the pages to view the complete results. Product images will be displayed here if they are included. The Next Page button will turn green as shown to guide you to view products in the additional pages.



Download Products to your Products Table

After making your selection click Next. BidMagic will automatically backup your existing database before downloading your new product choices. Downloaded Products now reside in your BidMagic database. Feel free to add labor values and other details to these products. Cable and other products sold in bulk quantities will recalculate your cost and MSRP prices based on a single unit. When this occurs, you will need to confirm the new calculations in the Product Manager before you can add the new Product to a bid. You do not need to be connected to BidMagic for them to work now and in the future. If you ever re-import a product, it will not overwrite the user fields like labor phase, links, etc.

Check Current Products

Do you want to make sure your Product prices are current? Click on this menu item and BidMagic will update the information for your current Products without forcing you to browse through thousands of products you chose not to load. This powerful feature allows you to directly compare the products in your Product Table with the products in the Online Product Library. Check the boxes for the products you wish to compare or click Check All then click Compare. Results will display on the next screen in the following colors:

Product Not Found (Black)	Product Updated (Blue)	Product Current (Green)	Product Discontinued (Red)

Discontinued products will have the checkbox checked. Then you can confirm which products you wish to update in your Product tables. Your Product Tables are not updated until you confirm this update.

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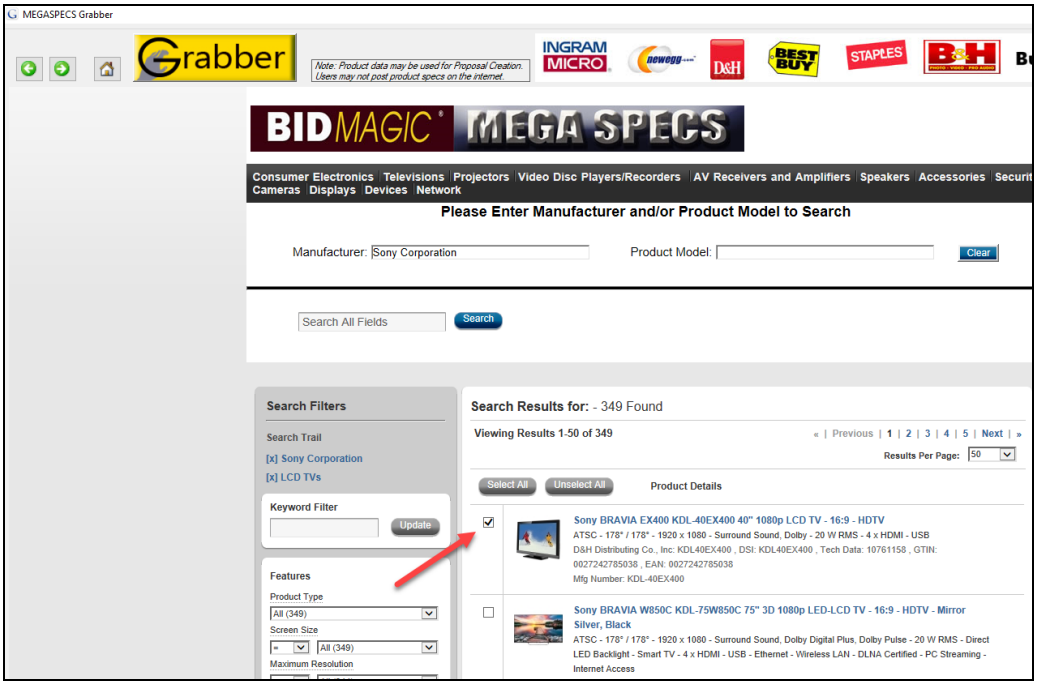
Tip: SHFT Click and CTL Click on the Selector Boxes on the left of the products to multi-select large groups of products more quickly.

Even with 150,000+ products in our Online Product Search, we will never have all of the products from all of the suppliers you might choose. This process will give you results from the products you may have entered that are not in our Online Product Search. BidMagic will automatically backup your existing database before downloading your product changes.

Searching Online MEGASPECS with the Grabber
(Included with Online Product Search Tools Subscription)
Click on the menu Online Products/MEGASPECS Grabber to begin to search directly in the complete listing of 3 million products. Easily search through AV, Security, IT and Electronic products and compare their specs. Select from top manufacturers and models or Search all fields. Then filters on the left side of the screen provide many ways to find the products you are searching for and manage the search trail.



Click on a product name to select it or click on the checkboxes to select up to 50 products at a time. The Grabber Button will then turn Green. Click the Grabber button to add the selected product(s) to your local product database.

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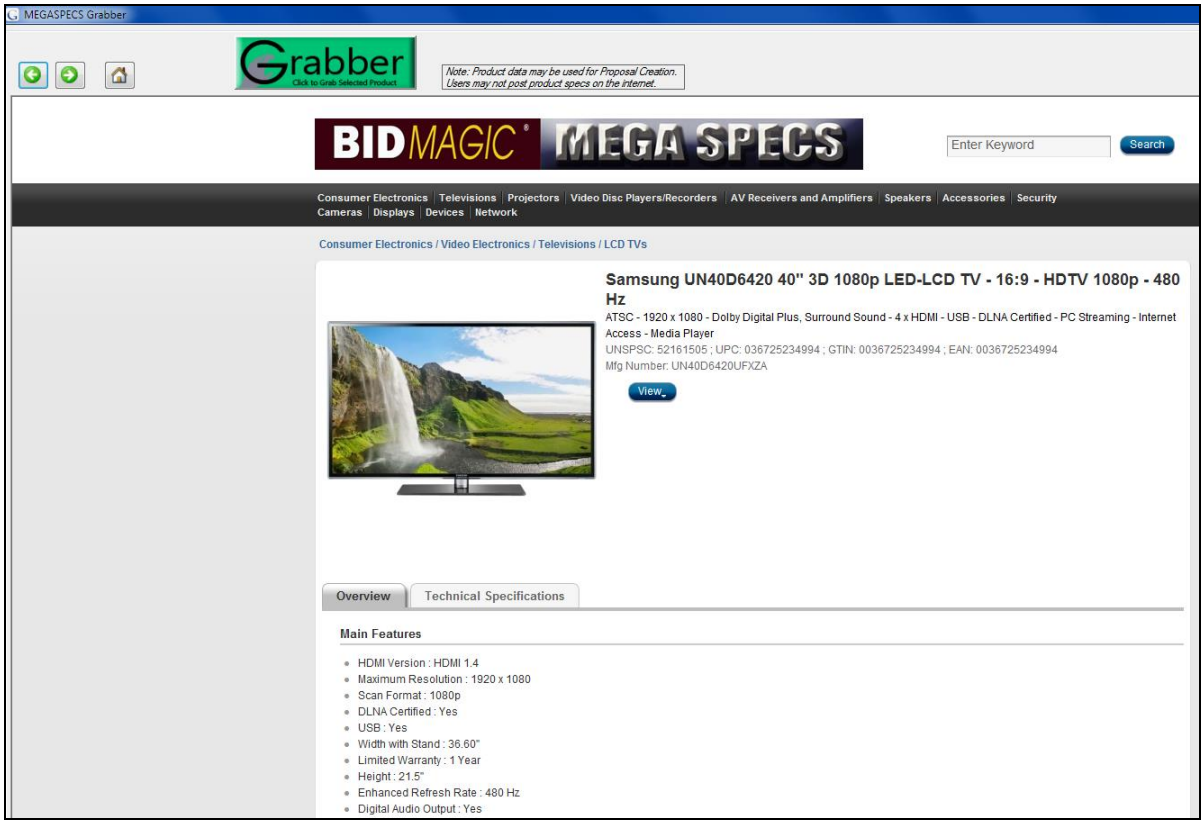

Adding MEGASPECS Data to New or Existing Products

(Included with Online Product Search Tools Subscription)

Our new MEGASPECS contains detailed product specs for over 2 million AV, Security and IT Products. Easily get complete product details, images and specs to add to your proposals. Open or Add a Product in BidMagic's Product Manager. If the Manufacturer's number (MFGNumber) is entered and the Manufacturer's name (MFG Name) is also entered, clicking MEGASPECS will search for all available product specs. This method grabs the MEGASPECS for one product at a time. You can also enter the product UPC (barcode) number by itself to pull down the specs. Note: Importing will not overwrite existing prices, labor values or other user data not included in MEGASPECS.

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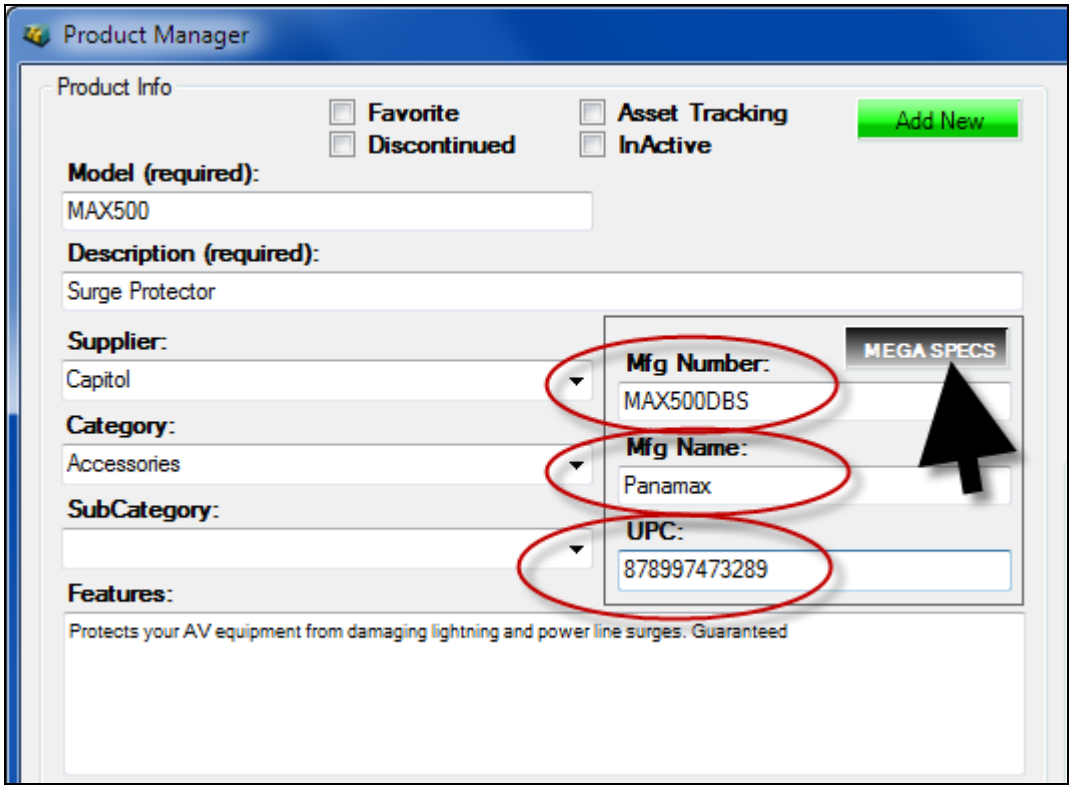
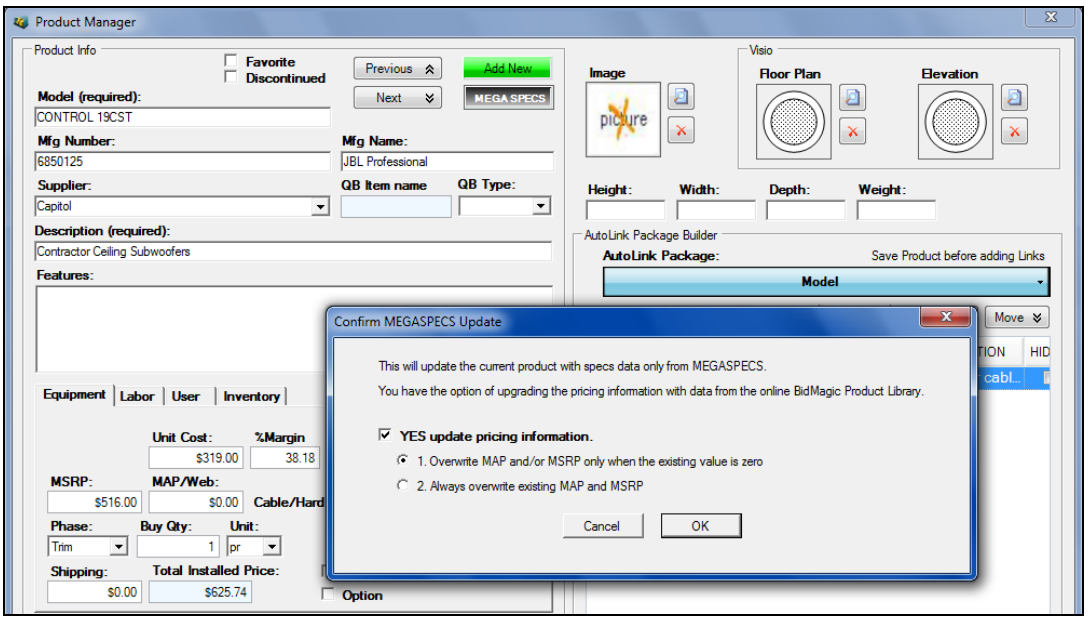


If pricing is also available from the Product Library, you will see a choice to add the price data also.



Users can add these specs to their proposals. Do NOT post any MEGASPECS product information online. Any abusers of this policy are subject to having their services terminated.

Adding MEGASPECS to Multiple Products in the Product Table
(Included with Online Product Search Tools Subscription)

Shift/click or CTL click on the green square Product Selector to select multiple products in BidMagic's Product Table. Then right click to open the submenu. Select Get MEGASPECS to add to all selected products at once.

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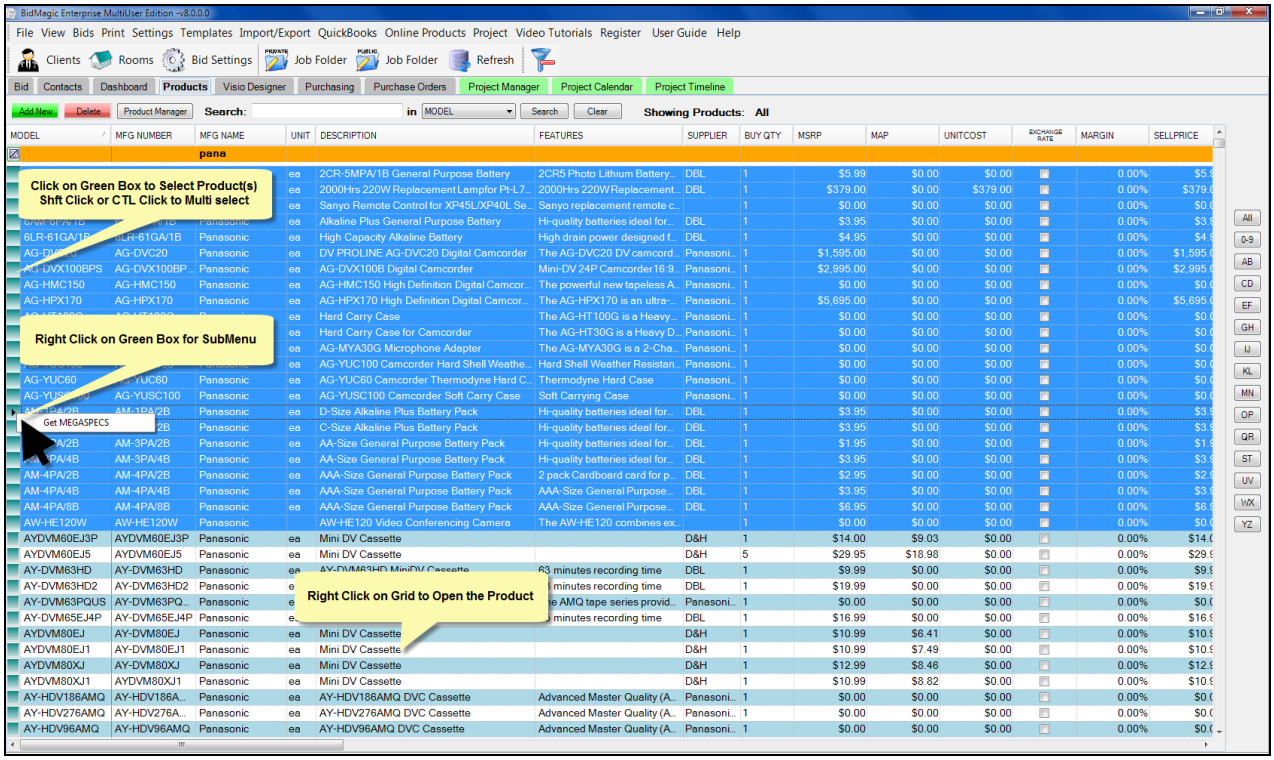

Web Product Grabber (Included with MEGASPECS Subscription)

Even with all of the products in our Online Product Search and MEGASPECS Grabber, there may be additional products you want to searching for. BidMagic can search find very up to date and accurate product information from Google Products. Search through thousands of retail products. Compare prices from key online stores that your clients can see. Then click the Grabber and instantly bring full product details into BidMagic, including image, model, description, features, dimensions, weight and more. Note: This works within Google Shopping, but cannot capture all data from all websites. Try searching on flat panel TV. Most products will display “from 10+ stores” or something similar. Those products can be Grabbed. Click on the selected product and the Grabber button will turn green, indicating it is ready to Grab. This method grabs one product at a time.

If a product says “from AV wholesalers” (an example single website), the product cannot be Grabbed and BidMagic will ask if you wish to navigate outside of the Grabber search. If this occurs, click on the option to ‘compare from 2 or more stores’ or ‘features’, then the Grabber should turn green, confirming you can grab the selected product info.

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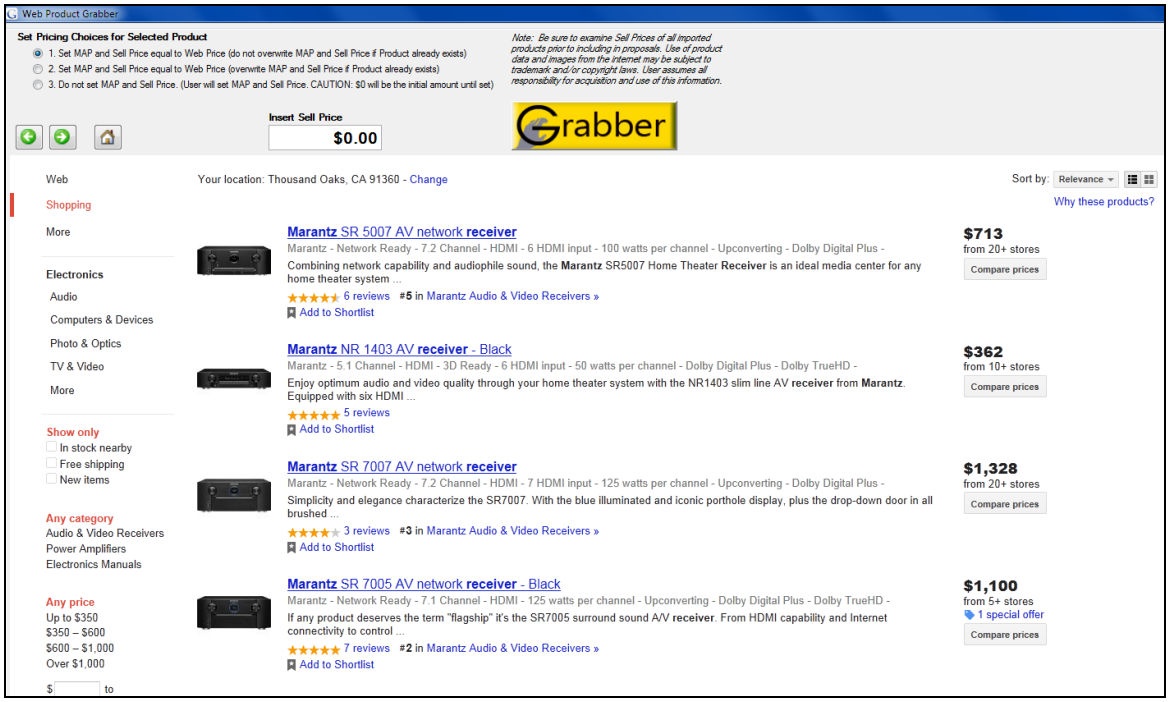
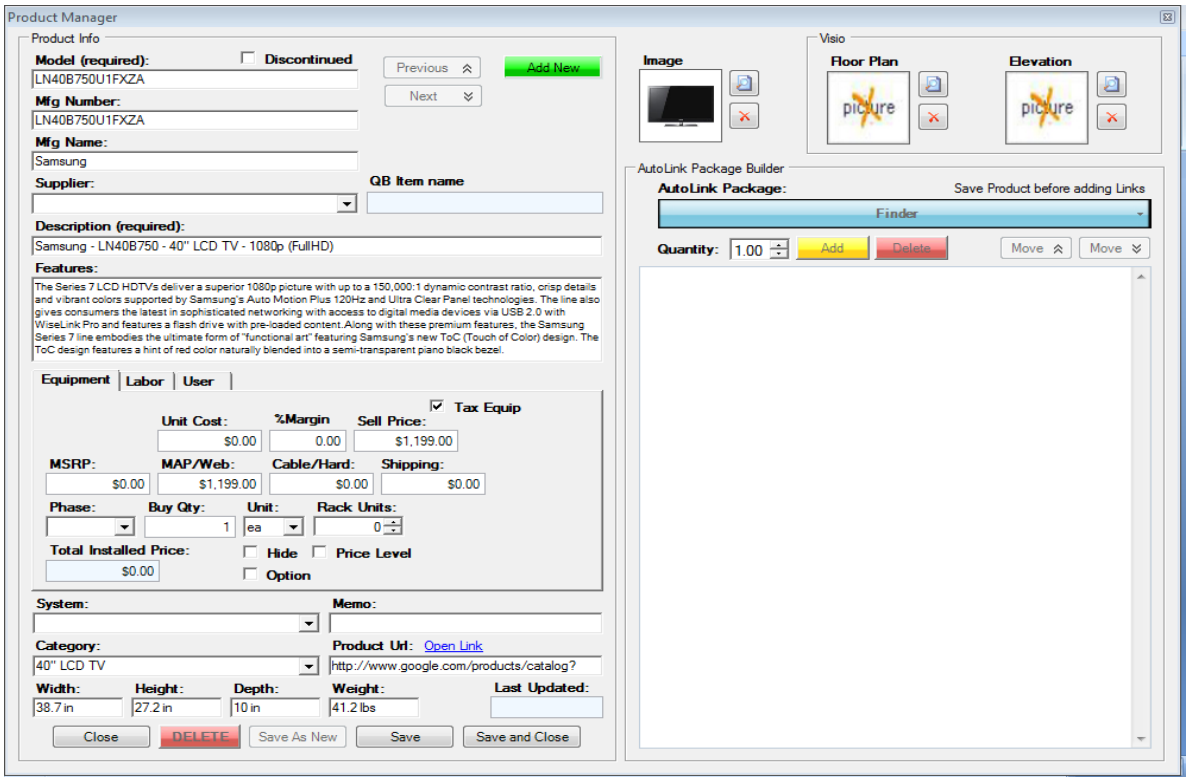


Results after Grabbing an Online Product into BidMagic.



Search AV-iQ Commercial Products with the Grabber (Included with Online Product Search Tools Subscription)

Click on the menu Online Products/AV-iQ to begin to search directly in the massive list of commercial AV products in this awesome list that is religiously kept up to date. This screen lets you grab one product at a time. AV-iQ is a trademark of NewBay Media.

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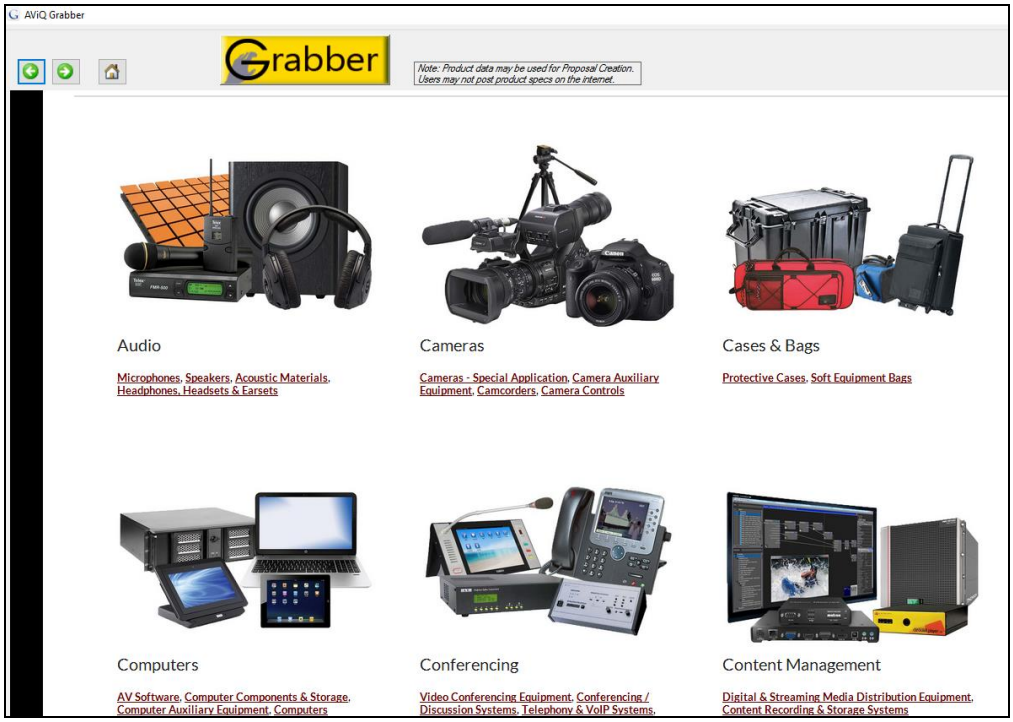

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PRODUCT SELL PRICES

During the Product download process, you will be prompted to set important pricing preferences prior to downloading products from our server.

1. You can choose to automatically set your sell price to MSRP for all products. This will update sell prices for new Products and update those for your existing Products.
2. You can choose to automatically set sell price only for New Products (not currently in your Products table) to MSRP. This will make no change to the sell prices of your existing Products.
3. You can choose to add your sell price later (it will initially be set to $0) Be very careful to set this price before adding these Products to a proposal. If you do not enter this information, then you risk having the Product appear in a proposal listed with $0.00 as the sell price.

We recommend option 1 or 2 for downloading the products. Then you can still establish your own sell price later. Note: Certain manufacturers and suppliers may choose to not include an MSRP price. Pay special attention to establishing your sell price to avoid a $0.00 sell price entry.

Be sure to examine the sell prices of all imported Products before including in a proposal.

Important Pricing Notes: The Online Product Library generally shows MSRP prices per each or per pair. Bulk Cable shows MSRP per foot, not per reel or box. The BuyQTY indicates if purchased in units like 500 or 1000. Multipacks of small hardware (example: 100 ‘F’ connectors) and installation tools are generally not included in the Online Library. Product images for small hardware and cable are generally not included.

If you attempt to add a Product to a Bid where the SellPrice and Labor =$0, BidMagic will warn you and prompt you to enter a SellPrice.

BidMagic works hard to ensure that our Online Product Search contents are accurate and updated once a month when product prices change. While deemed reliable, we make no guarantee as to the accuracy of this product data. Users agree to hold BidMagic Corp. and suppliers furnishing product data harmless regarding the use of this product data.

Import AVAD PriceBook (Included only with Online Product Search Tools Subscription)
If you are an AVAD dealer, you can go to AVAD’s website and login with your dealer credentials. This will allow you to create a PriceBook, which includes all the products you are authorized to purchase and your dealer cost information. This is very helpful realtime product info. Follow the steps below to directly pull this information into BidMagic. There may be products that do not show and MSRP, so we have included options for setting your sell prices. Please double check your sell prices, as we are not responsible for errors.

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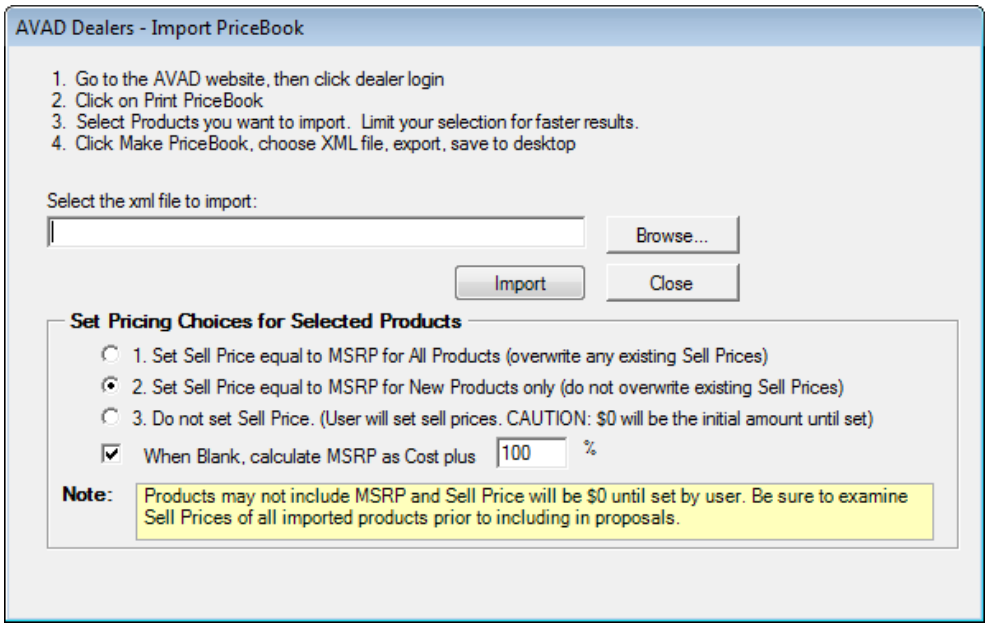

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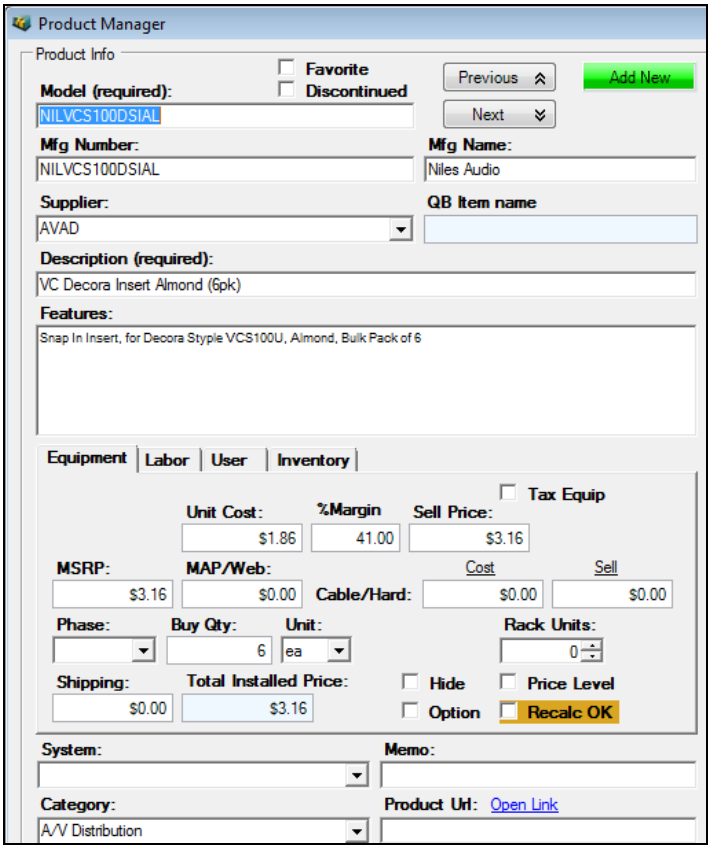
Multi-Unit Package Pricing notes:

One of the challenges of managing products occurs when dealers order products in multi-unit packages but then sell to end users in single units. For example, if you order cable in at $50 for a 500' box, but then sell to your customer at $.25 per foot, a conversion is necessary. If you import product pricing from spreadsheets, we suggest that you pay careful attention to this detail to avoid pricing errors.

BidMagic addresses this need with a product field called Buy Qty. In this case you should enter 500 as the Buy Qty. Then, BidMagic Purchase Orders can calculate how many boxes of cable are needed for each job. Many types of products that are sold one at a time may be purchased and priced in 5 packs, 12 packs, 100 packs, etc.

If you import product information from the AVAD Price book, BidMagic will pull in the Buy Qty information and do this conversion for you. When this occurs, BidMagic will flag these products in a gold color so that you can verify the converted unit pricing. After approving the amount, click on the Recalc OK checkbox to approve this price and remove the flag.



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VIDEO TUTORIALS

These video tutorials teach you how to use BidMagic in about 2 hours. This requires speakers or headphones for audio. The User Guide always has the most up to date information.

REGISTER

BidMagic requires registration to be completed when it first runs. Fill in your company name and complete contact information and agree to the terms to submit your registration. If you have purchased the Pro or Enterprise version or optional features, they will be activated for you when your registration is activated. Allow 2 business days for activation to be completed. Click on Help/About to check the status of your registration and verify that any optional features are turned on.

HELP MENU

About (registration features)
Check your current software version info. View your active features, Date when Activation or Renewal is required and see your PC Hardware ID.

Create Support Ticket
Click on this Link to submit a Tech Support Ticket. Our support team will respond to assist you.

Contact
Contact BidMagic for assistance. 1-800-598-5860 option 1 for Sales, option 2 for Support. Email support@bidmagic.com

Compare BidMagic Versions
View a comparison table for features available in Standard, Pro and Enterprise versions.

Support Forum
Our new support forum has a wealth of information about support issues. This menu contains a link to the forum where you can search the knowledge base found there. http://forum.bidmagic.com

Check for Updates
Use this menu item to check for new BidMagic updates.

View Recent Changes
View a list of recent changes in the latest versions.

Run Clean Up Query
If you have trouble printing a bid it may be due to importing product data that contains errors. This clean up query is designed to repair bad product data. You can try running it to repair other errors also.

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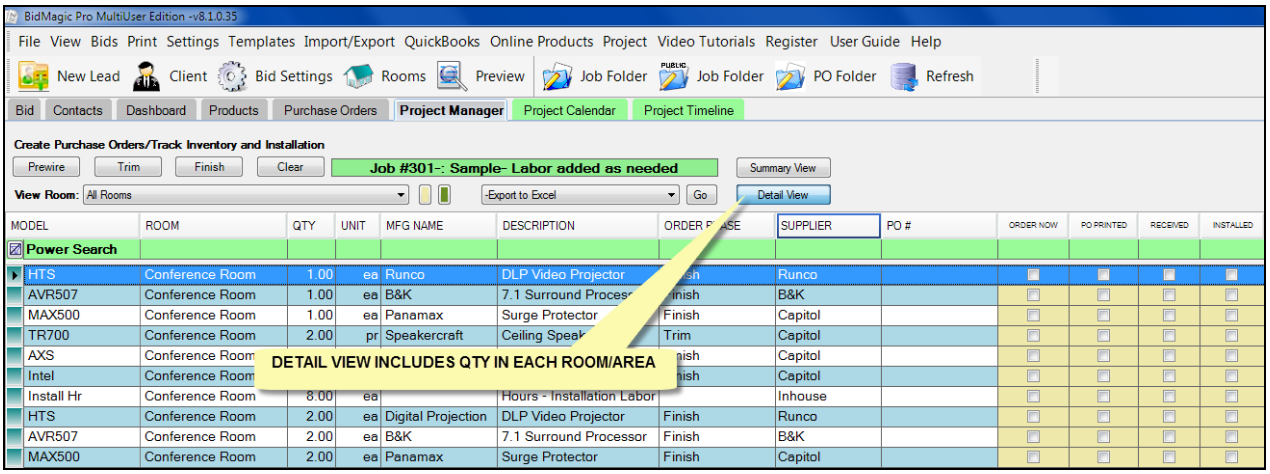
PROJECT MANAGER (PURCHASING, INVENTORY & MORE)

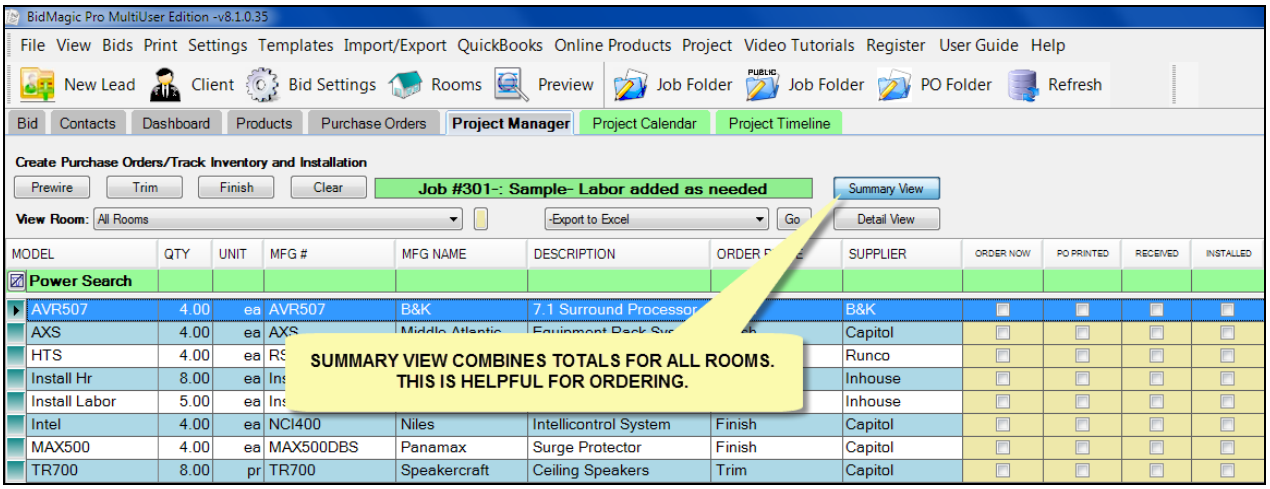
This screen makes is super easy to keep track of products ordered and installed on a per job basis. Select the Bid you want to work with and then click on the Project Manager Tab. This screen shows the products that need to be ordered and installed. Click Show Detail to view by rooms and/or filter by rooms. Click Show Summary to see the total items, regardless of the associated rooms. The bright green power filter allows instant filtering of all columns. Items highlighted in Pink indicate that notes have been attached to this product. CTL + Right Click opens these notes and shows the history of these notes.



MODEL	ROOM	QTY	UNIT	MFG NAME	DESCRIPTION	ORDER P...ASE	SUPPLIER	PO #	ORDER NOW	PO PRINTED	RECEIVED	INSTALLED
Power Search												
HTS	Conference Room	1.00	ea	Runco	DLP Video Projector	...sh	Runco					
AVR507	Conference Room	1.00	ea	B&K	7.1 Surround Proces...	...inish	B&K					
MAX500	Conference Room	1.00	ea	Panamax	Surge Protector	Finish	Capitol					
TR700	Conference Room	2.00	pr	Speakercraft	Ceiling Speak...	Trim	Capitol					
AXS	Conference Room					...nish	Capitol					
Intel	Conference Room					...nish	Capitol					
Install Hr	Conference Room	8.00	ea		Hours - Installation Labor		Inhouse					
HTS	Conference Room	2.00	ea	Digital Projection	DLP Video Projector	Finish	Runco					
AVR507	Conference Room	2.00	ea	B&K	7.1 Surround Processor	Finish	B&K					
MAX500	Conference Room	2.00	ea	Panamax	Surge Protector	Finish	Capitol					

Detail View

The Detail View displays all of the products and their quantities in the same grouping as on the Bid page. This view includes room/area details. The View Room Filter allows users to select a single room or area to be viewed. For Enterprise users, this view explodes individual asset tracking items for data entry.



MODEL	QTY	UNIT	MFG #	MFG NAME	DESCRIPTION	ORDER P...E	SUPPLIER	ORDER NOW	PO PRINTED	RECEIVED	INSTALLED
Power Search											
AVR507	4.00	ea	AVR507	B&K	7.1 Surround Processor		B&K				
AXS	4.00	ea	AXS	Middle Atlantic	Equipment Rack Sys...	...h	Capitol				
HTS	4.00	ea	RS...				Runco				
Install Hr	8.00	ea	Ins...				Inhouse				
Install Labor	5.00	ea	Ins...				Inhouse				
Intel	4.00	ea	NCI400	Niles	Intellicontrol System	Finish	Capitol				
MAX500	4.00	ea	MAX500DBS	Panamax	Surge Protector	Finish	Capitol				
TR700	8.00	pr	TR700	Speakercraft	Ceiling Speakers	Trim	Capitol				

Summary View

The Summary View disregards the organization by rooms and combines the quantities of each product on a single line. This is helpful when you wish to order products for the entire job and condense the results into the totals needed. Asset tracking details are not displayed in the summary view. Some features from Detail view may not be available in Summary View. BidMagic will automatically shift to Detail view when you attempt to use a feature that requires Detail view.

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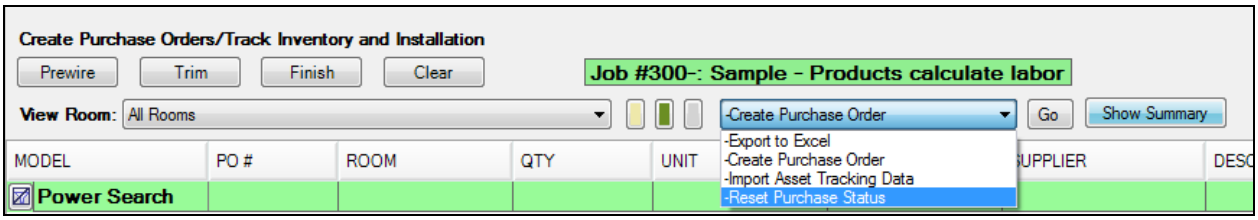

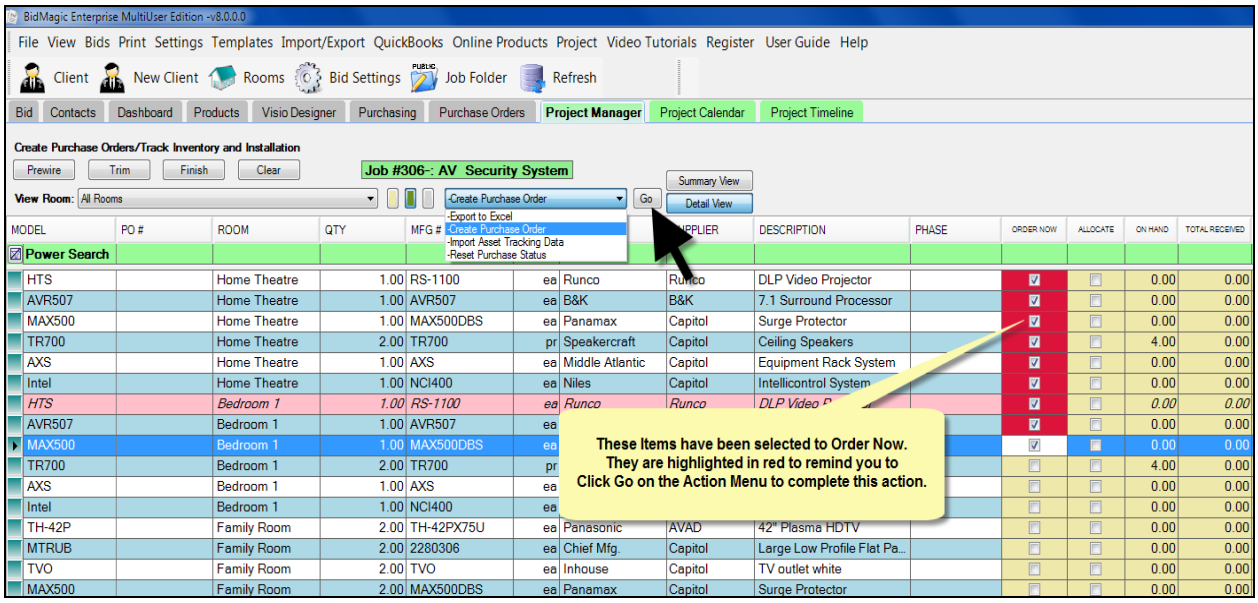

Action Menu - GO

The Action Menu contains options to Export to Excel, Create Purchase Order(s), Import Asset Tracking Data and Reset Purchase Status. First select the Products you wish to include, (the selected items will be highlighted in red until you complete the action. Select the action you wish to perform from the Action Menu. Then click on the GO button to complete the selected action.

For Calendar users, this screen also details all labor phases. These columns appear in dark green. For Enterprise users, this screen also shows Asset Tracking. These columns appear in gray. For convenience, we have included managing the steps for completing this job.

This screen includes powerful tools to manage your products and installation for ordering and installation. Each Product in the Bid has checkboxes after it to order Products and track the status of installation labor. Calendar users can track progress for all labor phases. The green section tracks purchasing. The pink section tracks installation phases showing unchecked boxes if labor has not been scheduled, a clock face indicates labor is scheduled on the calendar. A checked box indicates labor is complete for the item. If no checkbox is present, the product does not include labor for that labor phase.

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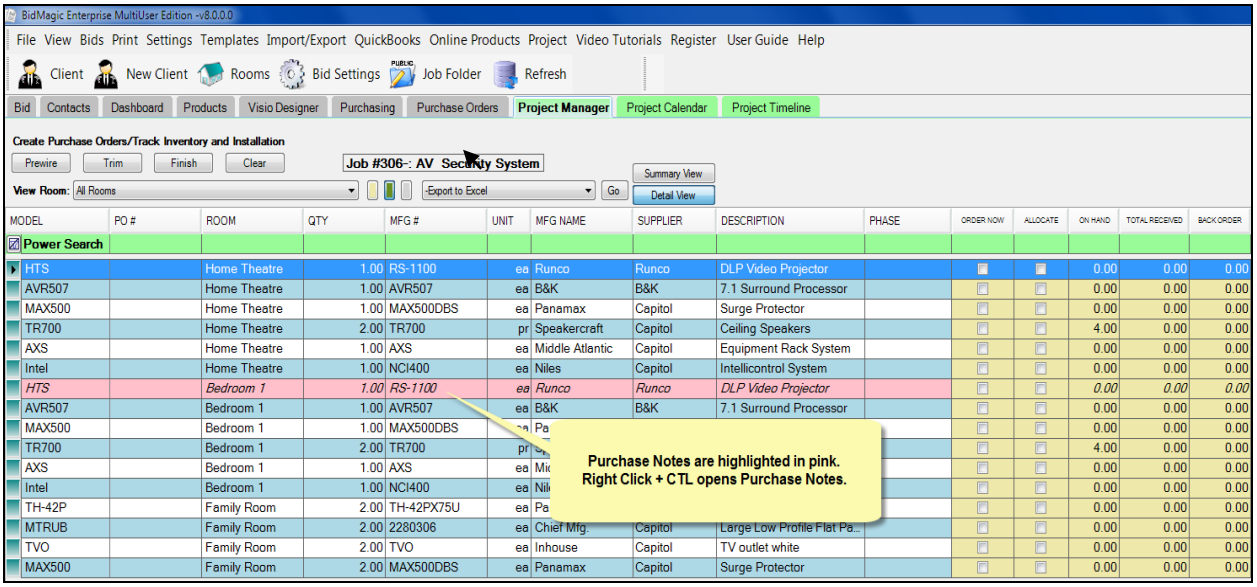

SELECTING PRODUCTS TO ORDER

Step 1: Click the Order Now checkboxes for the products you wish to order. (A supplier must be associated with each product to order it.) Products and services that do not need to be ordered from outside suppliers should list the supplier as 'None' and checkboxes to order will not appear in the Project Manager or Purchasing screens. For more power ordering, Select all Prewire, Trim or Finish Products. This automatically checks the products assigned to that Equipment Phase. Once checked, you can manually edit check or uncheck any of the boxes. Your standard Supplier will be listed. Click on that choice if you wish to select a different supplier for this order. The Clear button un-checks all selections.

Use the Order Now checkboxes to select products that you wish to order, they will be highlighted in red. (This loads the products as Ready to Order).

The power filters let you instantly enter search values to narrow your selection. Note: Double Clicking on the Order Now header will select all or deselect all of the checkboxes in the current view. Checkbox columns can be filtered by typing True (T) of False (F) to make a selection.

If you have Inventory turned on (Optional in Pro, included in Enterprise) You can see the QTY on hand for each product and allocate from this inventory instead of ordering. You can only allocate up to the value of the current QTY on hand. Once products have been allocated, the order now option will be grayed out to make sure you do not also order the products. Keep in mind that you can choose to order products first then allocate them anytime the QTY on hand is sufficient.

Tip: Assign a designated supplier for products that do not require ordering. If the supplier is named: None, BidMagic will automatically exclude those products from the ordering process, meaning that fewer boxes need to be checked. Examples of items that generally do not need to be included in Purchase Orders would include labor, in-house products, customer supplied products, miscellaneous charges, etc.

Step 2: After checking your selection(s), you can create Purchase Orders or perform other actions in the Action Menu. In the dropdown Action Menu, select Create Purchase Orders or select another desired action. Then click the Go button to complete the action. In the event that you need to reset the purchase status for products, choose Reset Purchase Status in the Action Menu, then click on the product and click the Go button.

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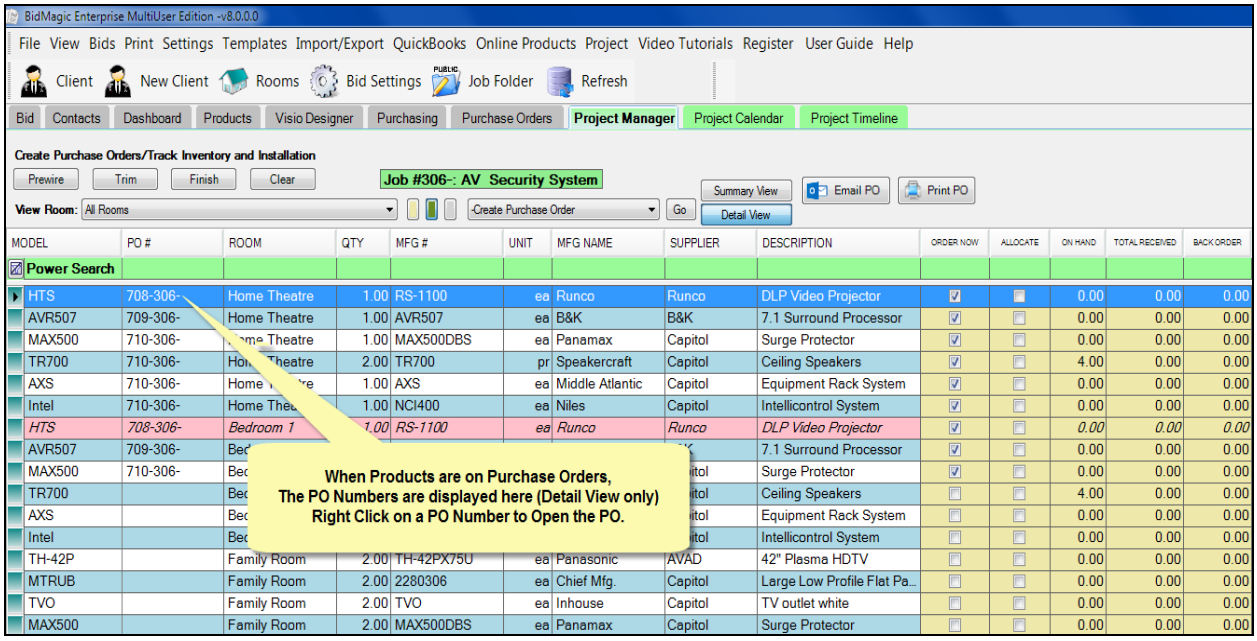
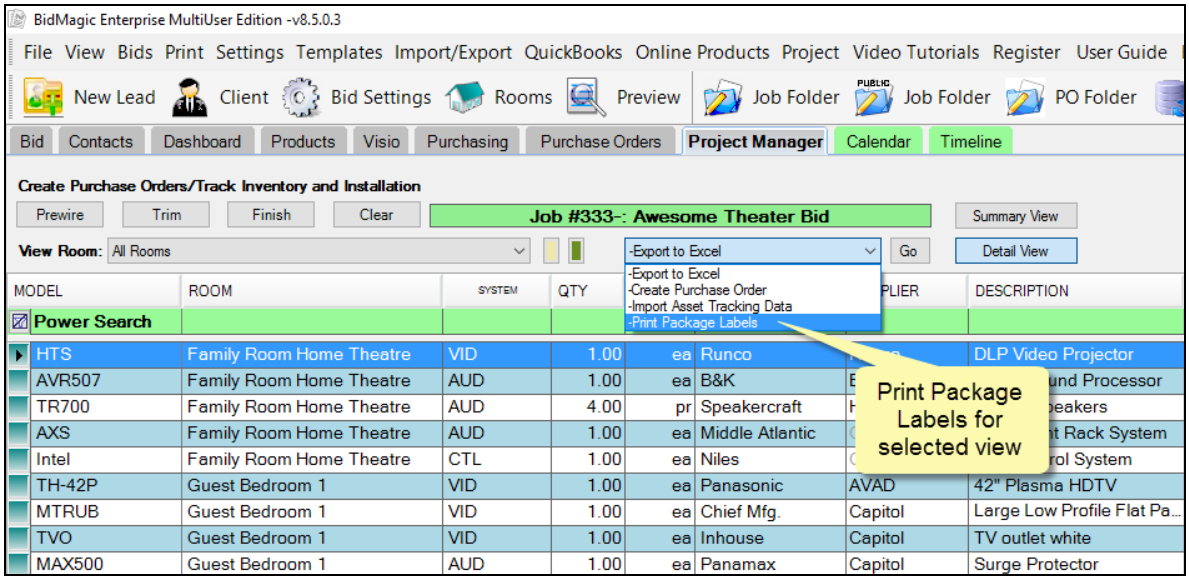
There is also an option in the dropdown action menu to Reset the Purchase Status of a Product. This should be done only in a rare case where a change occurs. Click the Go button after checking the desired boxes.



Step 3: After creating Purchase Orders, right click on the PO number to navigate to that PO. Click on the Purchase Order Tab to view and your entire list of PO's. Click the blue green box on Right Click on a PO to open it. All of the selected Products will added to Purchase Orders. When a PO has been printed, emailed to the supplier or sent to QuickBooks, a copy will be saved in the Purchase Order Folder.

PRINT PACKAGE LABELS:



Print Package Labels

In the Project Manager, you can use power search filters and other filters to select a group of products.

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Then click on the Action Menu and select Print Package Labels and hit GO. This will output 4”W x 2”H labels to attach to the selected products. Each label will contain the client name and bid name, manufacturer’s name, model number and room or system where the product will be installed. The label template can be edited to customize it for your use.

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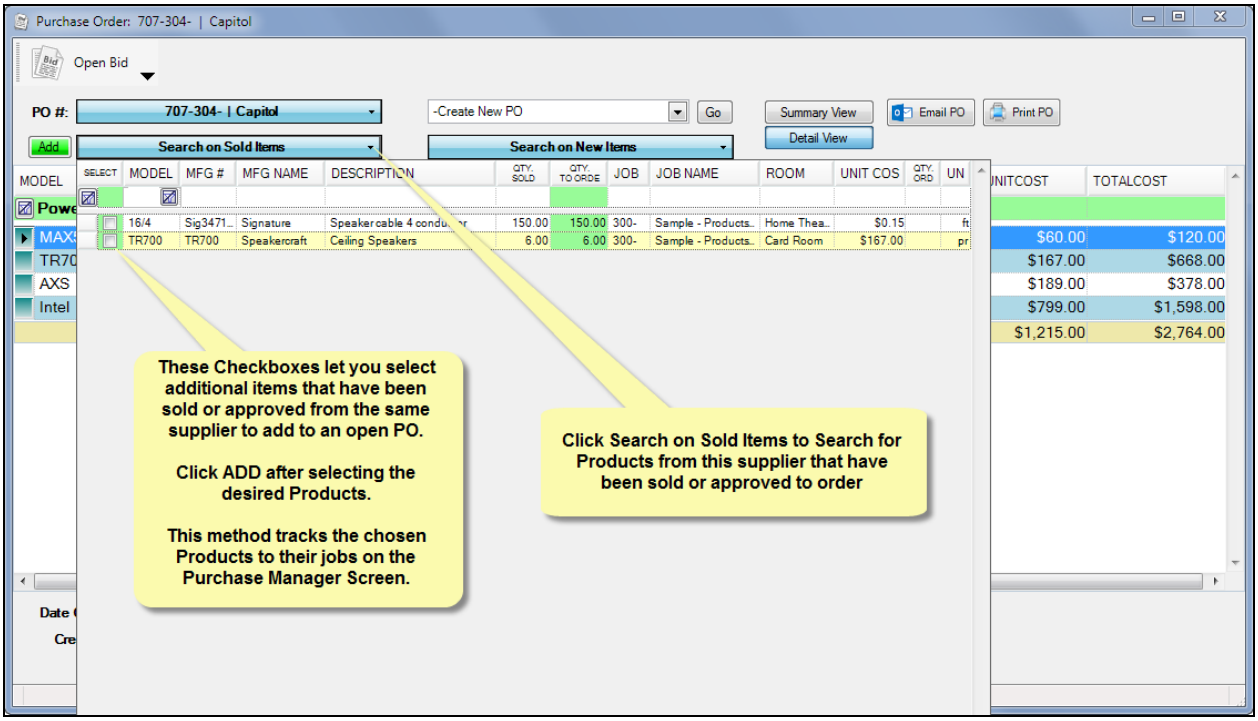
PURCHASE ORDER SCREEN

The new Purchase Order screen allows users to manage Purchase Orders. Click on the blue green box on the left to select one or more PO('s). SHIFT Click or CTL Click to multi-select. Once selected, you can Click on the Print PO Icon.

OPENING A PURCHASE ORDER TO REVIEW AND PRINT

Each PO is assigned to a single supplier. Note the example below shows PO# 701-300- | Crestron. Right click on any PO to open it. Opening a Purchase Order provides access to a number or features that are shown in the Action Menu. Select the action you wish then click Go to execute the action. The PO can be edited, printed, notes added, etc. Click the Detail View Button to see all of the detailed items where you can change QTY, Unit Cost, etc. Click the Summary view for the summary of each item.

When the PO is open, you can Search on Sold Items to add additional products that have been sold and/or already approved to order **from the same supplier**. Click Search on New Items to add any additional products from the same supplier in your Products table to the PO. Select any item by clicking on the blue green box on the left. SHIFT Click or CTL click lets you select a range of products. Click Delete if you wish to remove a product from a Purchase Order. You can also select products to move to another open PO from the same supplier.



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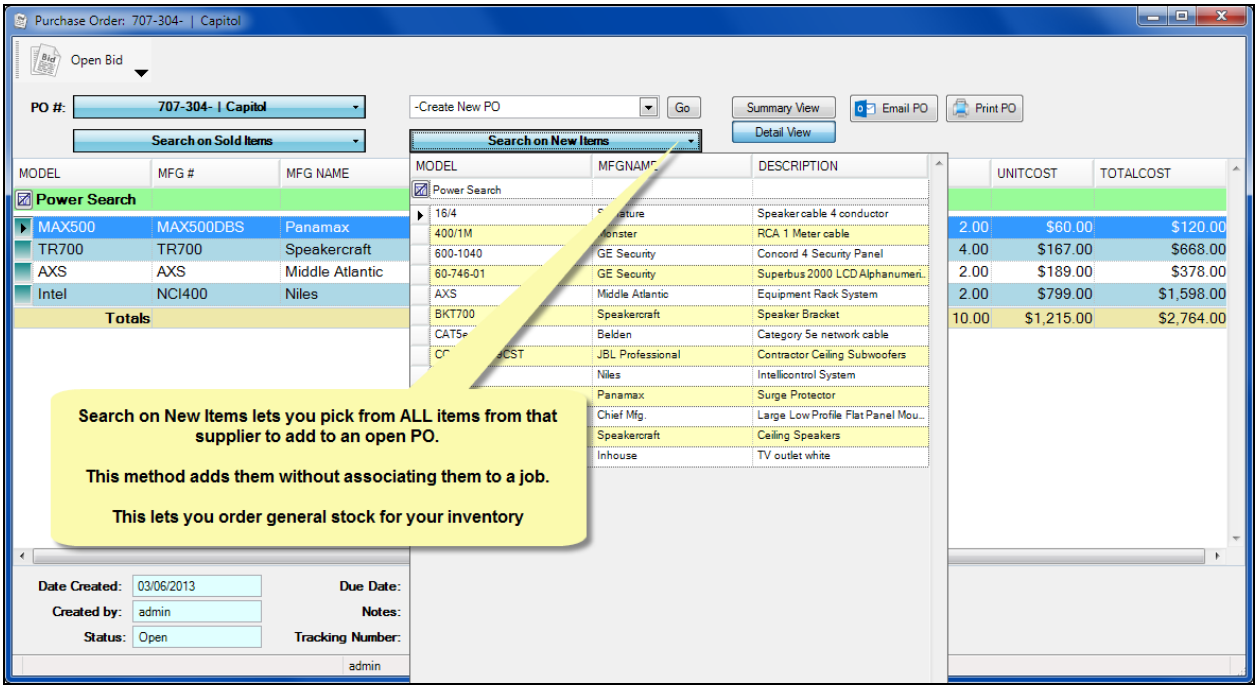

In the Detail View it is easy to change QTY and Costs for any line item in the PO. Click on the green Row Selector on the far left to select a row. Use CTL click or SHFT click to select multiple rows if you wish to delete them from a PO. This is helpful if you need to change suppliers after a PO has been created. Deleting items required from Proposals will reset then in the Project Manager Screen so they can be ordered from a different Supplier when needed.

After reviewing the PO, you can Print or select other actions in the Action Menu. Printing a PO will save a copy in your shared folder plus give you the option to email it directly to your Supplier. Once printed, the PO status will change to Printed and will be locked from changes. The Action Menu allows users to do many things including reopen and reprint a PO. Select the Action then Click Go to execute.

Delete or Close a Purchase Order

Deleting a Purchase Order will remove it from the records. Cancelling a Purchase Order will change it to the Cancelled Status and retain it for future reference. The status of products included in deleted or cancelled PO's will be reset to Preorder status so they can be ordered or Approved to Order status (Enterprise only).

Select Multiple Purchase Orders for Batch Emailing or Printing

It is very easy to select and print multiple PO's all at once. The Power Search Filters let you filter results based on Supplier, PO status, and other criteria to narrow your selection. Then Shift Click or CTL click on the green row selector box at the far left to select a group of lines. Once highlighted, click the Print PO Icon at the top of the screen. This will Print all selected PO's in Open status for printing. Note: Printed PO's will be ignored in this multi selection process. Clicking Email PO will allow you to send multiple PO's but does not provide a preview of the PO before it is sent.
When needed you can select single PO's to be Reprinted or Reopened. Note: Printing PO's in a batch does not open each PO for review and does not provide the option to email the PO's directly to the suppliers.

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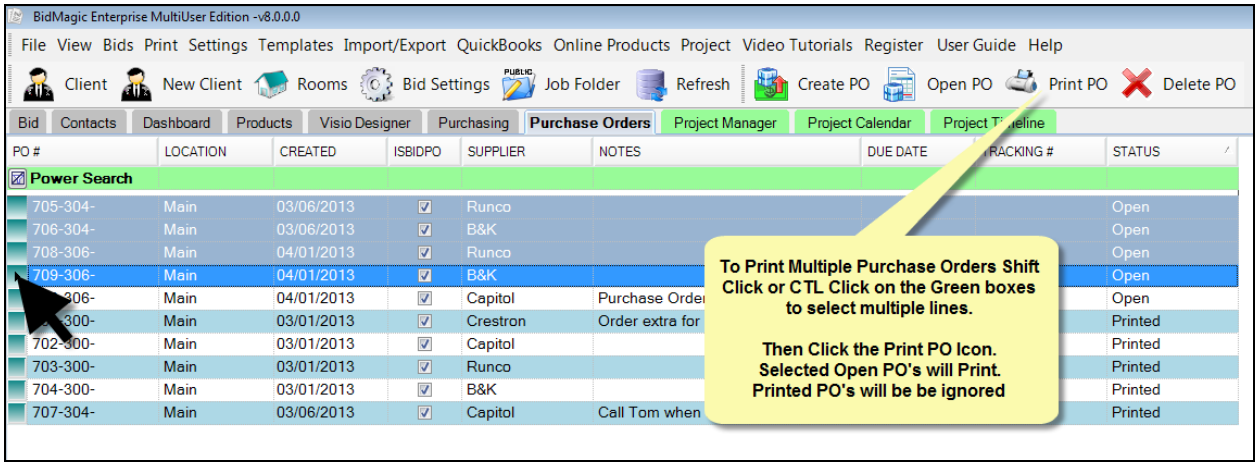
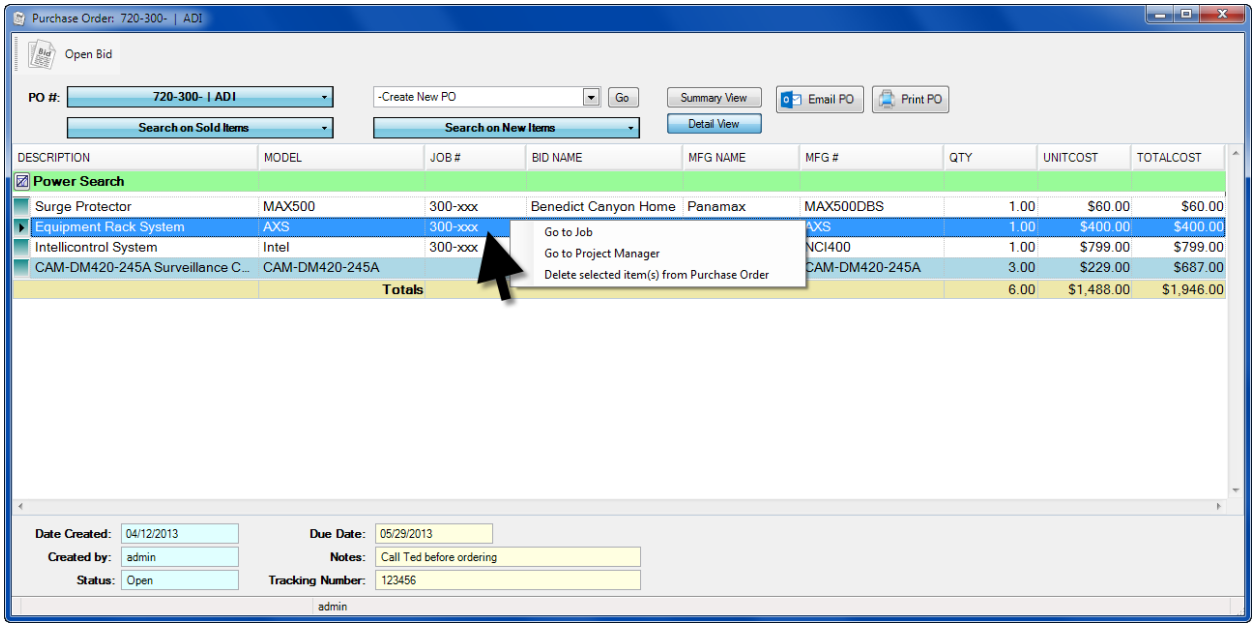


The Detail View in Purchase Orders shows the Job Numbers. Right Click on any Job# to open the submenu to navigate to the associated Job or View it in the Project Manager. Note: Purchase Orders may contain products associated with multiple Jobs or products ordered for stock purposes.



RECEIVING PRODUCTS ON A PRINTED PURCHASE ORDER

When each product arrives, open the associated Purchase Order to Click on the Received checkbox. This checkbox is only available for PO's that have been printed. Receiving Products adds to the inventory QTY on hand. This does not automatically adjust inventories in QuickBooks.
After receiving on a PO, you can navigate back to the Project Manager to allocate the Products to a specific job. Note: you must print a PO before you receive products on the PO.

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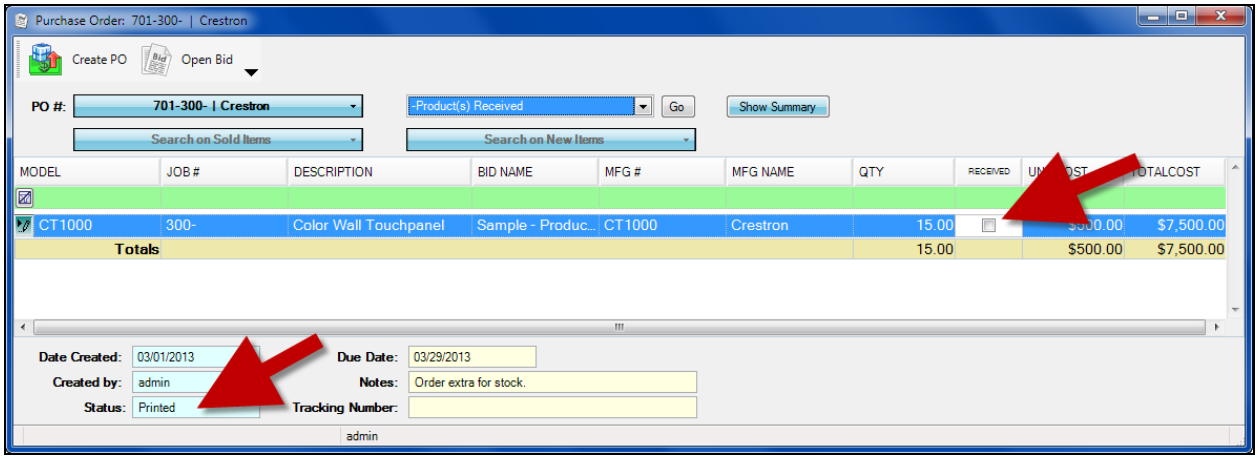
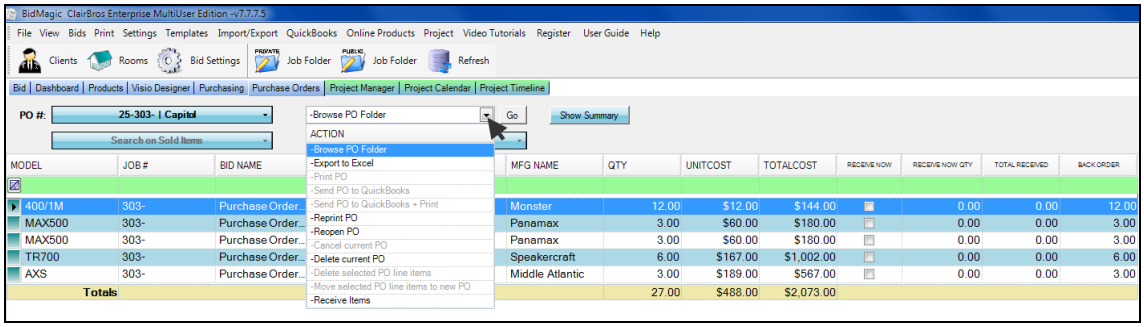


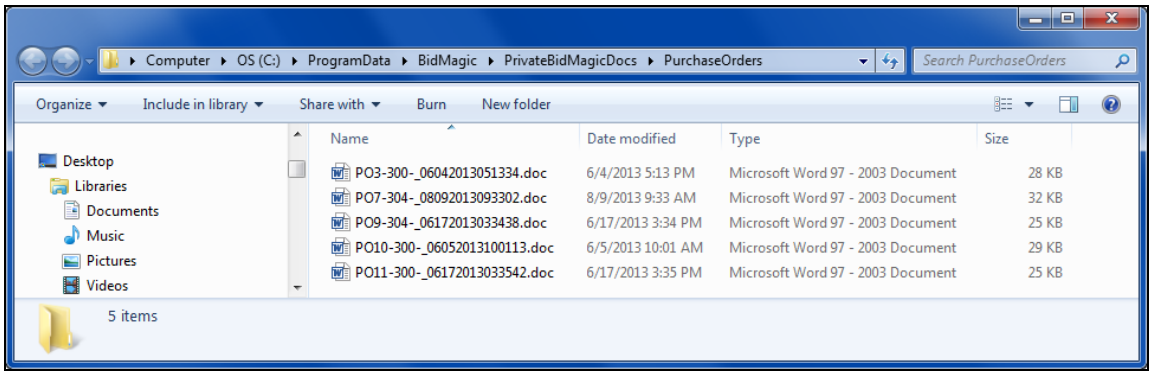
When each product is installed, check the Installed checkbox. There is also space to record product serial numbers (for warranty tracking) or other notes.

This simple but powerful method helps track the status of every Product in your Bids from Ordering through the finished installation. Users can manually override choices made on screen.

When finished adding products to a PO, click on the action menu to print the PO or to take other action. Click Go to complete the process. The action menu allows purchase orders to be printed, reopened, cancelled or closed. You can delete items from a PO, move them to another PO and more. The choices are very flexible. Each action taken by BidMagic users is recorded in the Job Log and can be reviewed and reports can be generated in Excel. Printed PO's are stored in the PO folder. Closed PO's will not appear on the Purchase Order screen unless you click on the icon named 'Show Closed'.



Click Browse PO folder to view copies of Printed PO's.



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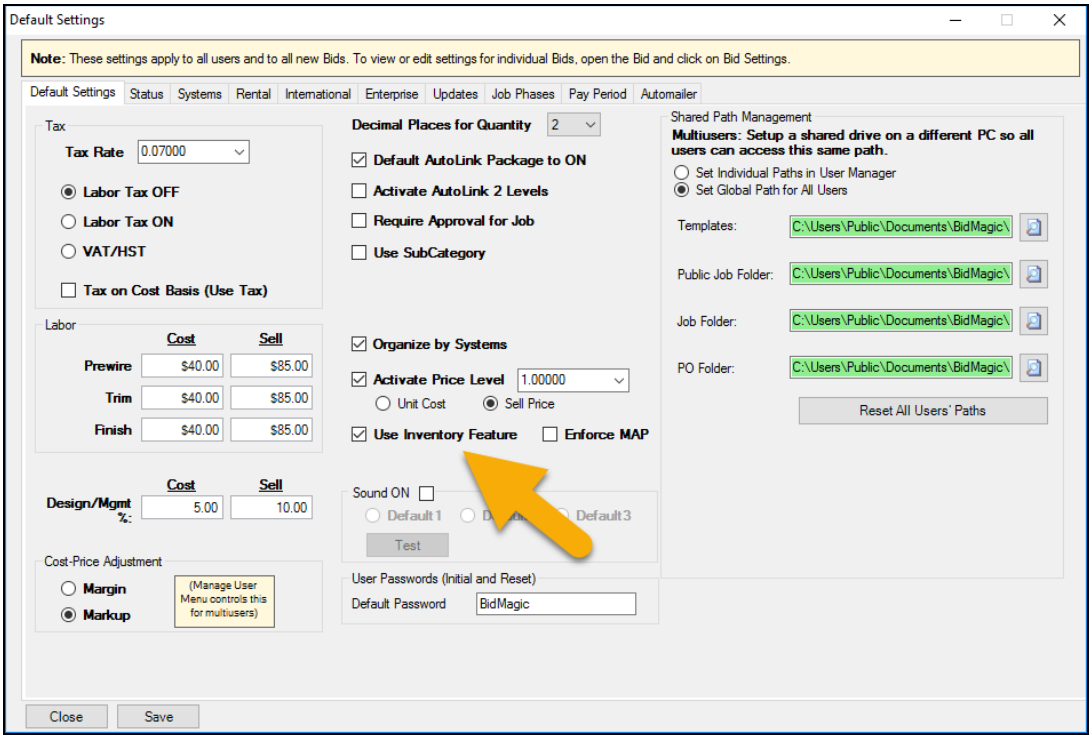
The combination of the new power search filters and the Order Status filters makes this a very efficient screen for managing Purchasing across multiple vendors and jobs. Any products needing special attention are highlighted in pink, indicating there are notes attached for purchasing.

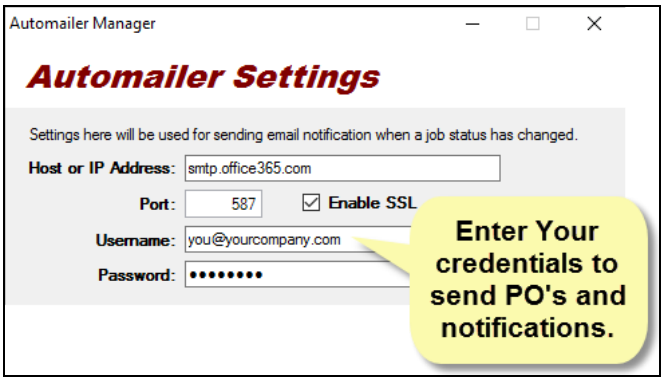
INVENTORY MANAGEMENT
OPTIONAL IN PRO, INCLUDED IN ENTERPRISE VERSION

BidMagic includes powerful tools inventory management. Enterprise users can setup multiple locations or departments, each creates a separate inventory that can be tracked. Make sure that Inventory is turned ON in Default Settings then setup permissions for users who need access to these features in the User Manager.



Automailer Settings

BidMagic send Purchase orders via email or email notifications (Enterprise Only) to selected users whenever selected Job Statuses are updated. This feature must be configured to send emails properly from your email client.



Use Inventory (Enterprise Feature or Optional in Pro)

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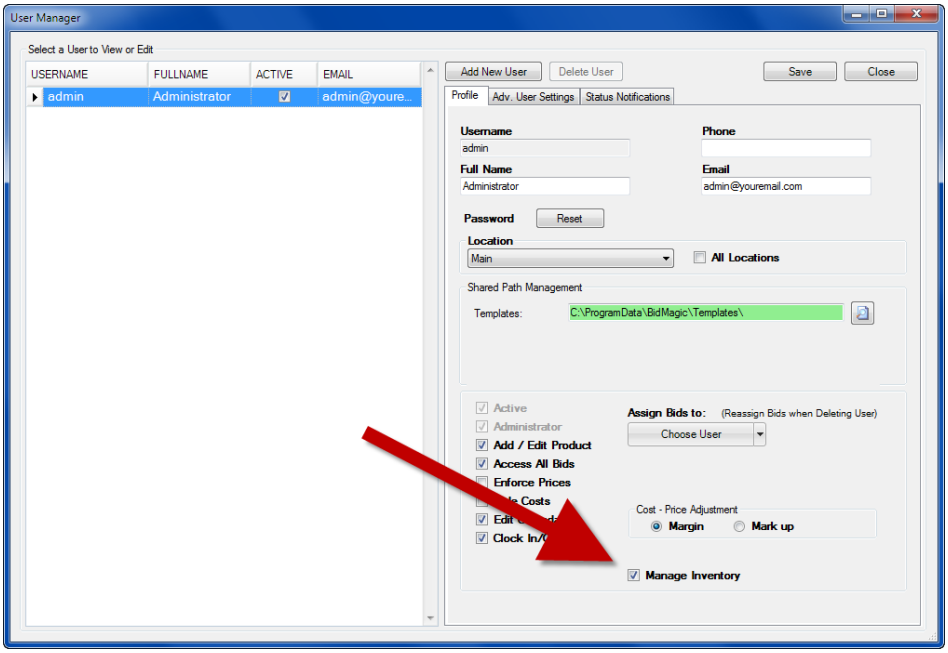
Check this box to activate inventory management. This will display current inventory in the Product Manage and Project Management screens. Click the Inventory Tab in the Product Manager to set or adjust inventory levels. If you have multiple offices or departments, inventory can be tracked and transferred between offices. Inventory is included in the Enterprise version and can be ordered as a separate feature

BidMagic includes powerful tools inventory management. Enterprise users can setup multiple locations or departments, each creates a separate inventory that can be tracked. Make sure that Inventory is turned ON in Default Settings then setup permission to Manage Inventory for users who need access to these features in the User Manager.



As you are adding Products to a Bid, you will be able to view the Inventory QTY on Hand.

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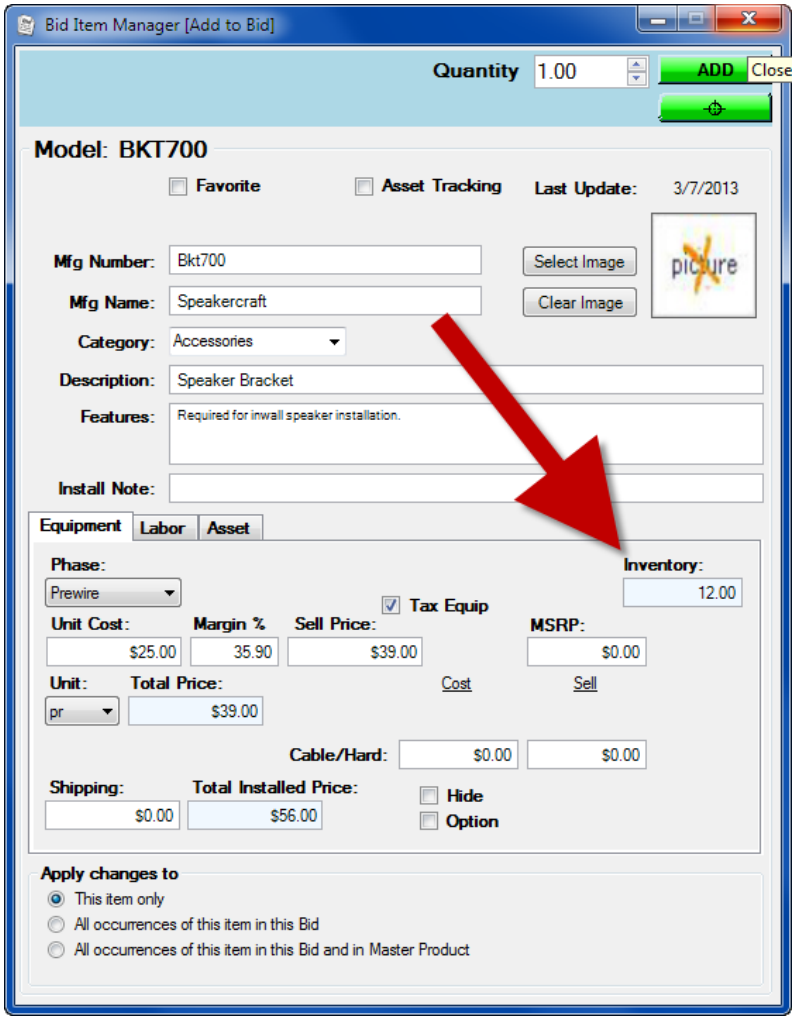

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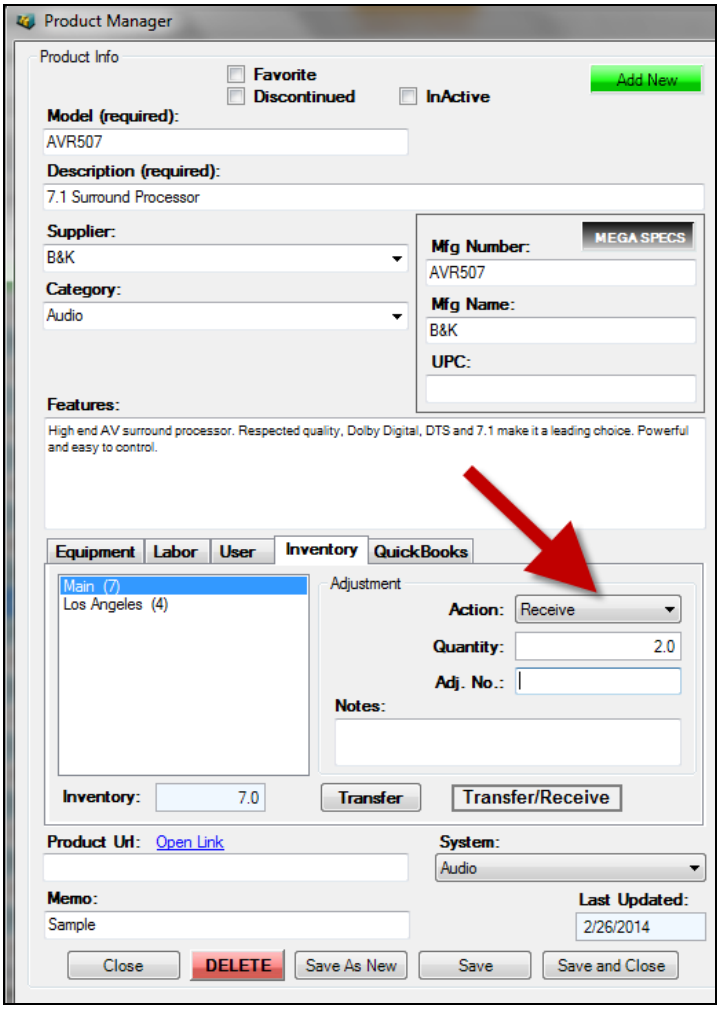
The Inventory Tab will be visible in the Product Manager allowing you to view single or multiple inventory levels and also make adjustments. Adjustments can be positive or negative amounts. On this screen you can transfer from one inventory to another. If you transfer from one location to another, the product will be stored 'in transit' until it is received at the other location. Hit Transfer/Receive to open the form to accomplish both steps with a single click.



Right Click on a the Product line selector opens a submenu for inventory management. You can also righ click directly on the On Hand Column to make adjustments to Inventory. When you transfer products from one location to another, you must also receive the products at the new location in the Transfer form.

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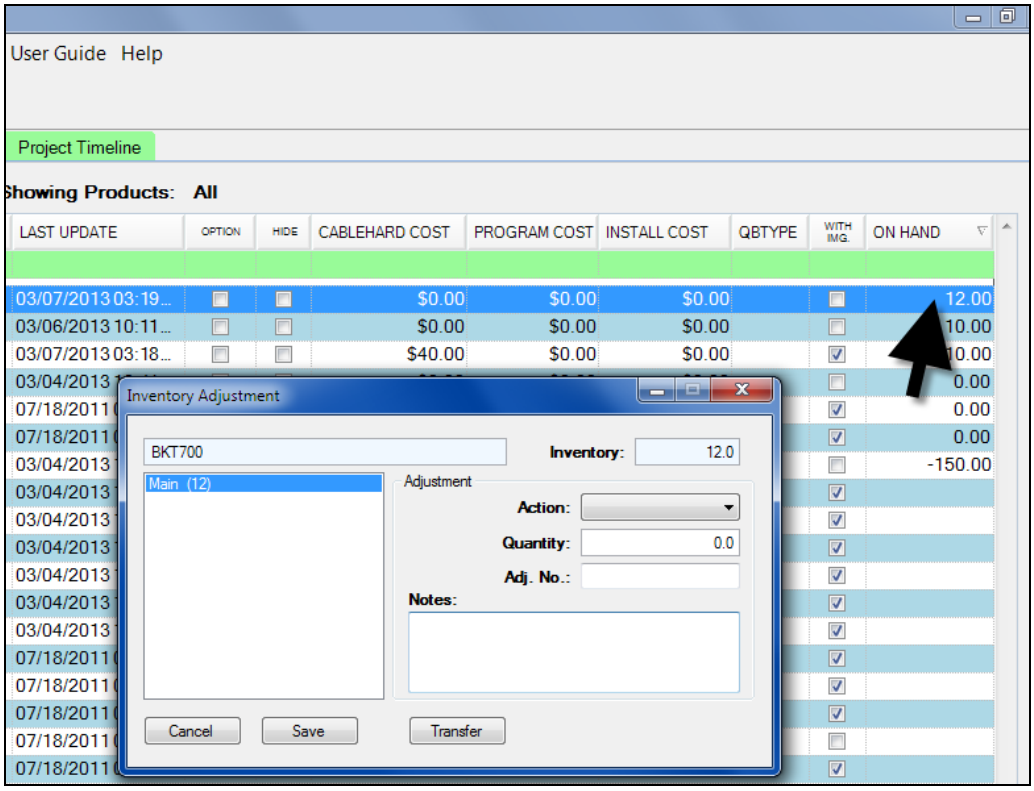
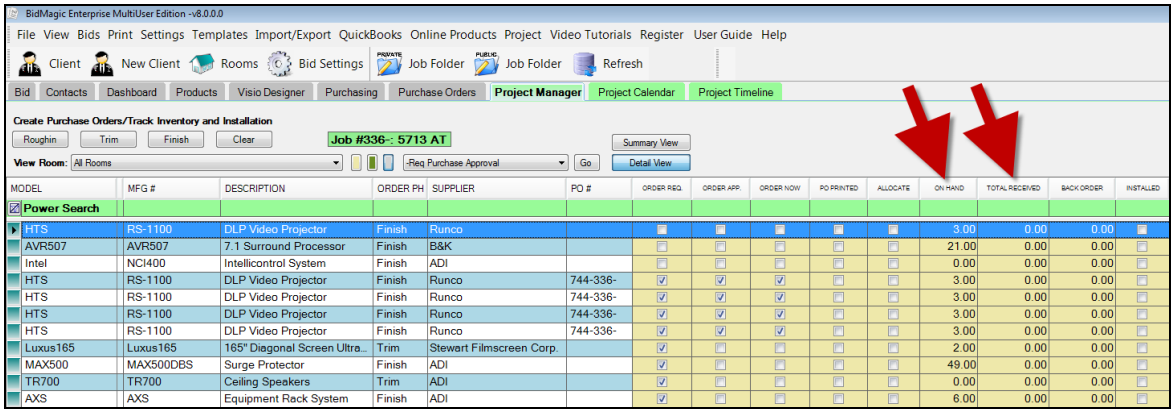


When you order Products on the Project Manager screen, you will be able to view the QTY on hand, the total Received and the Total Backordered. If you have enough stock on hand, you can choose to allocate from your existing QTY on Hand. You cannot allocate more than the current QTY on hand. Once products have been allocated, the order now option will be grayed out to make sure you do not also order the products. Keep in mind that you can choose to order products first then allocate them anytime the QTY on hand is sufficient. Any receiving or allocating activity will instantly adjust the QTY on Hand. Note that the Summary and Detail View includes the PO# and other line item details.



The Central Purchasing Screen also displays inventory for the current location plus the total for all locations. This screen lets users allocate and create Packing Lists to ship or transfer Products to other locations. When transferred out to another location, Products are shown “in Transit” and must be received at the new location before they appear in the inventory there.

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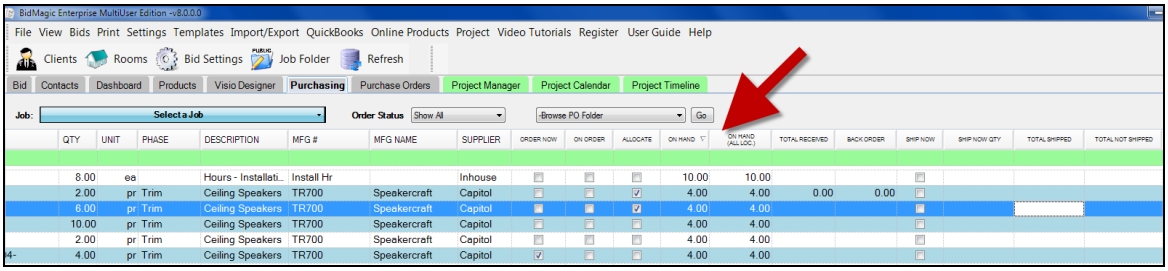

Creating Professional Wire Labels with a Dymo Rhino Labeler

We recommend creating professional wire labels with the Dymo Rhino Professional Labeler. This is an affordable, rugged hand held labeler that can create labels in the field or connect to PC's via a USB cable. Many AV distributors carry these labelers.

BidMagic Proposals can create Excel spreadsheets from Installation copies or from the Purchase Manager (Pro & Enterprise Versions only). Each of these includes a list of room and products in the rooms. These Excel lists can be edited and sent to Rhino Connect Software that is included with the 6000 or 6500. This allows you to download labels into the Labeler which can be printed or stored to print as needed in the field. Labels can include text, graphics, barcodes and more. Refer to the instructions that come with the labeler and software. Other PC connectable labelers that are compatible with Excel should also work.

Sales Reports

How many proposals did you create and sell? Now you can create a report on the status of your proposals. Select the range of dates to view all proposals created during that period. See or print a report of the proposals created, submitted, sold and abandoned along with the dollar value and totals. This is conveniently organized by salesperson.

Client Contact Report

This report shows client info for viewing, exporting or printing in an Excel spreadsheet format.

Tax Table

This is where you create and manage your sales tax rates. Add a new rate in the top box then hit 'Add' or enter. Edit existing rates directly in the list. To delete a rate, select the gray box just left of the name and hit your delete key. The Bid Summary section contains a dropdown box where you can select any of these rates. Example: If your tax rate is 7.25% enter as .0725.

Settings/Company Info Menu

Enter information about your company here as you would like it to be printed. Be sure to fill this in as this info will print out on many of the reports. You can choose whether your company info will show or hide in your client proposals.

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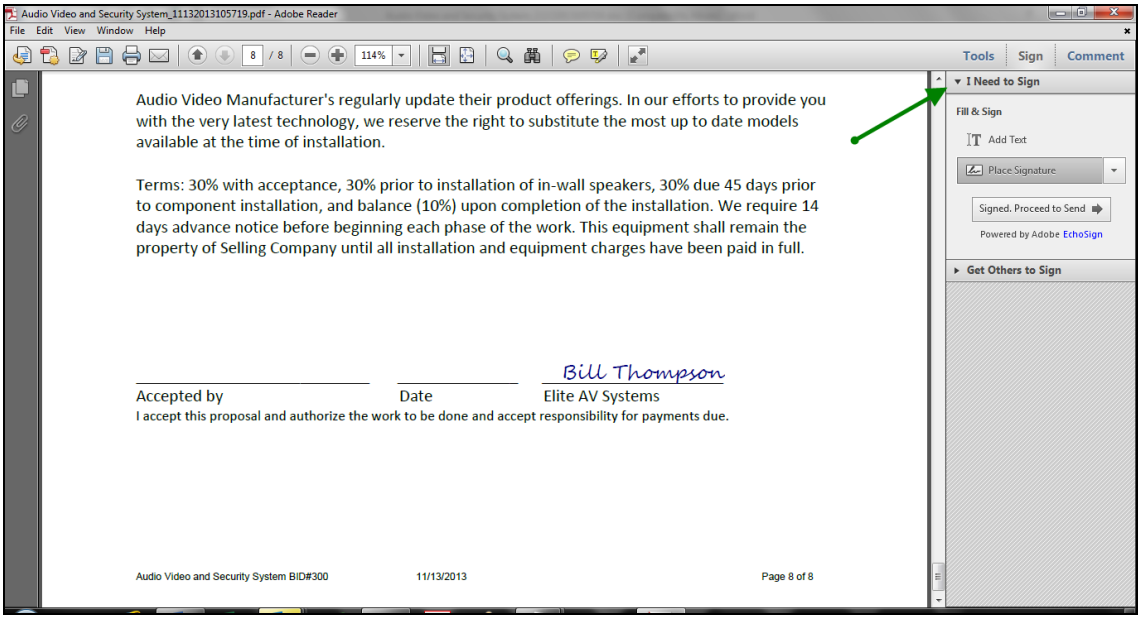
DELIVERING A GREAT PROPOSAL

We recommend printing your proposal on your color company letterhead on high quality paper. First class proposals are often contained in a custom printed folder or binder. Your company brochure and the salesperson's business card are also essential. The following pages are printed on your company stationary.

1. Proposal Cover page
2. Your Cover letter, Company Story and Client References
3. The Proposal Detail and Summary
4. Product Images and Information
5. Visio floor plan, elevation and rack drawings.
6. Scope, Terms & Conditions (Contract Language) Page
7. Signature/Acceptance.

Signature Capture in a PDF

Customers can sign off on a PDF. Click Sign, I Need to Sign and then you can place an existing signature or Add Text to fill in a new signature.



Signature Capture with Windows 8 & 10.

Windows 8 has built in Pen features that can be used with a mouse. If you also have a touchscreen, then you can use a stylus or even your finger to have your customer sign off directly in the live Word document as seen below. Open the document and touch the screen with your finger. This will open the Ink Tools/Pens Menu in Word, as shown below. Then select the Pen and you can write anywhere on the screen. Other tools include a handy eraser and highlighter.

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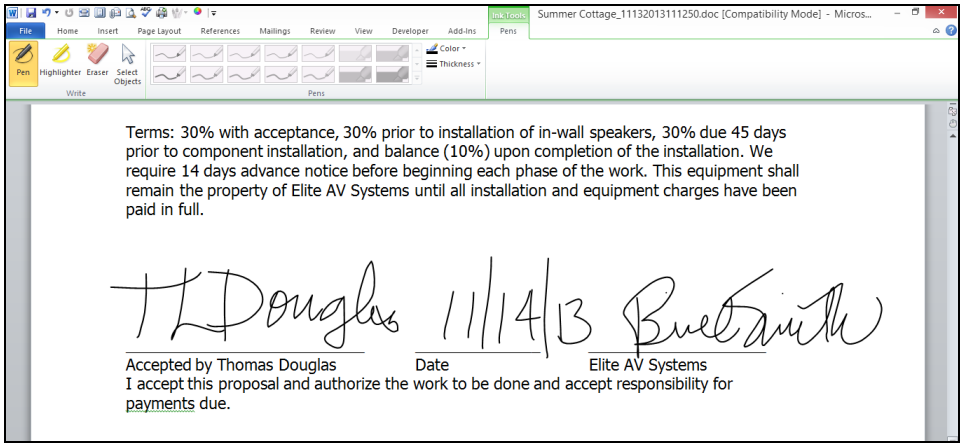
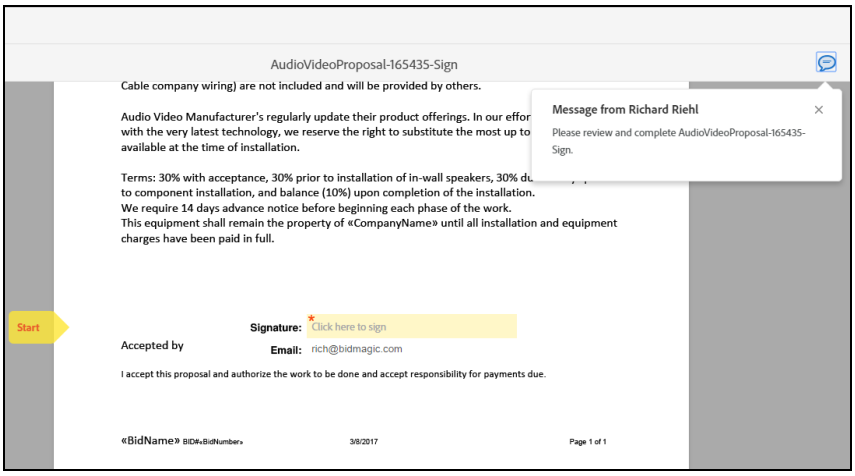
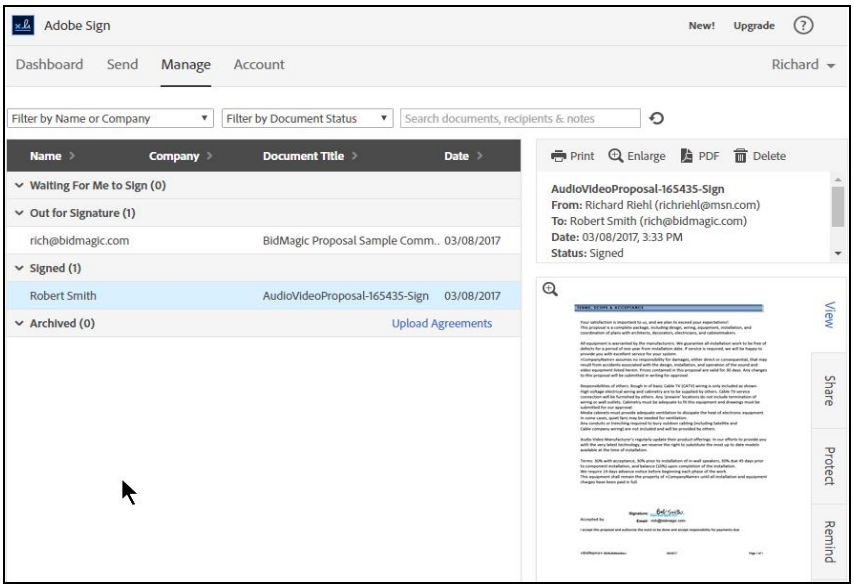


Send for Signature with Adobe Sign.

For a very cool eSignature experience, save a copy of your proposal as a PDF. Then use Adobe Sign to send it out to your client for signature. Adobe Sign will show all documents out for signature, the date signed, history notes and additional help to manage the process.





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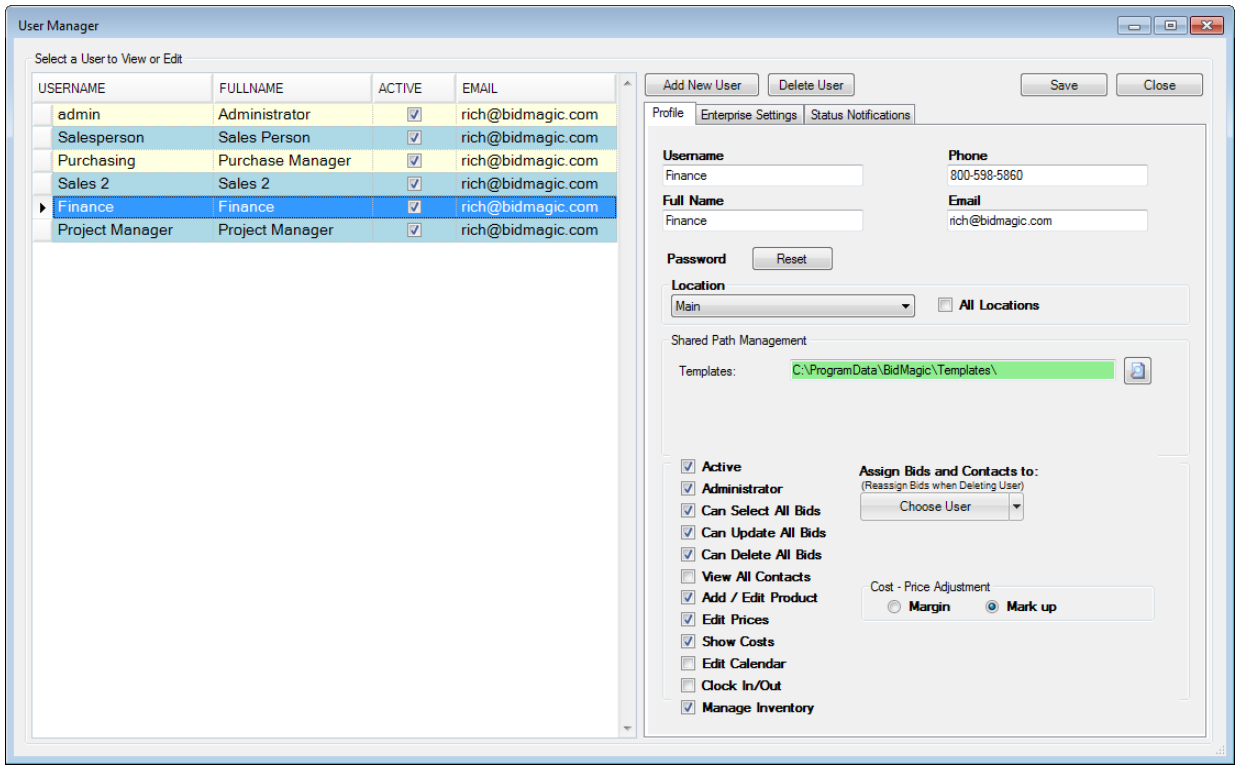
MULTIUSER PERMISSIONS AND FEATURES

There are several levels of access that can be assigned to BidMagic multiusers:

- Administrators control permissions for other users and can perform SQL backups.
  Note: Even a single PC BidMagic installation can setup as many users as needed. (One at a time access.) Each user will have a separate username and password. Any admin can set add new users or set permissions for these users. We recommend assigning only one or two administrators who can:
- Assign user rights to run software updates (limit this to one or two users.
- Assign user rights to select, edit, delete all bids. Individual bids can also be shared.
- Assign rights to Add/Edit Products to users who need to change the Master Product list. Note: If adhoc products are enabled, all users can create single use products (ad hoc, one-off) miscellaneous products to add to a bid. These products are assigned special model numbers with the following format: Misc_12345. These special products do not appear in the Products table or in other bids.
- Assign user rights to view all contacts vs just their own.
- Enforce Prices does not allow Sell Prices to be changed. (Bottom line discounts and adjustments in the Bid summary section are not prohibited)
- Hide Costs also restricts user from viewing Profit Reports.
- Access to Calendar scheduling and Clock In/Out are available for Calendar users.
- Manage Inventory allows users to make Inventory adjustments and transfers

If an employee leaves your company, an administrator can remove or deactivate their access to BidMagic and reassign bids and contacts to another user.



Standalone Multiusers (Disconnected)

During installation BidMagic installs the database on your computer. If you install on additional computers, each will connect to their own databases. This setup does not users connect to a common

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database. With this scenario, each computer contains the Clients and Bids that are created on that computer only. Portable Bids can be sent back and forth and can be opened by disconnected users. These Bids bring all data needed for the bid. If you Save a Portable Bid on a PC, any new product data contained within the Bid will be added to your database.

The Products in the database can be exported and imported into these independent databases with the Import Wizard to make sure that all computers work with the same Products and Pricing. XML Import/Export is the preferred method because it includes AutoLink Package relationships and Product images.

True Multiuser Connections on Network or Server (Pro/Enterprise Feature)
The BidMagic application is installed on a single master PC where you wish to run the software.
If you have multiple licenses, you can setup additional users to connect to this PC by creating simple desktop shortcuts. Refer to the Multiuser Installation Instructions later in this guide. Existing users with BidMagic installed on multiple PC's connect by sharing the SQL database. These settings are found in Settings/Database Connection.

One at a Time Sharing (Pro/Enterprise Feature)
In some offices a single user wants to run BidMagic on a desktop computer and a traveling laptop. One solution is to install BidMagic on the primary computer. Then, run remote desktop software (PC Anywhere, GotoMyPC, Remote Desktop, etc.) on your laptop to remotely run BidMagic with an internet connection to a PC desktop. This method is limited to a single user at one time. We suggest these solutions but do not provide tech support for them. Additional licenses are required for remote desktop access to a server.

Multiuser Login (Pro/Enterprise Feature)
If your BidMagic has Multiuser features turned on, you will need to provide your user name and password. Click Remember if you want BidMagic to automatically recall your Password.

How to Bypass Multiuser Login (Pro/Enterprise Feature)
Multiusers can configure the BidMagic shortcut to automatically provide your User Name and Password during login. Note: this will remove any login security. Right click on the BidMagic shortcut, click on Properties/Shortcut.
Add the following at the end of the Target: /U:YourUsername /P:YourPassword.
Note: there is a space before /U: and before /P:

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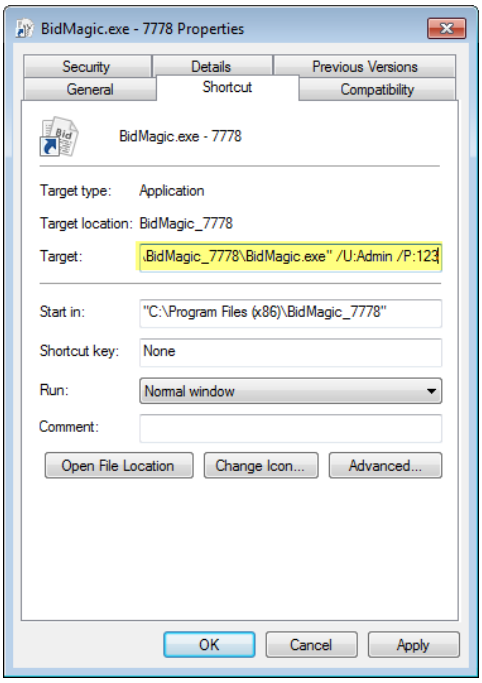

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Automatic Software Updates

BidMagic includes a system to automatically deploy new versions to our users. The software will notify users when updates are available. Click on Help/ Check for Updates if you want to check. During the update the following support screen may appear to indicate the progress of the update and to provide additional information for selecting file paths. Multiusers should set permissions for users to manage who can begin an update as all users must update at the same time.

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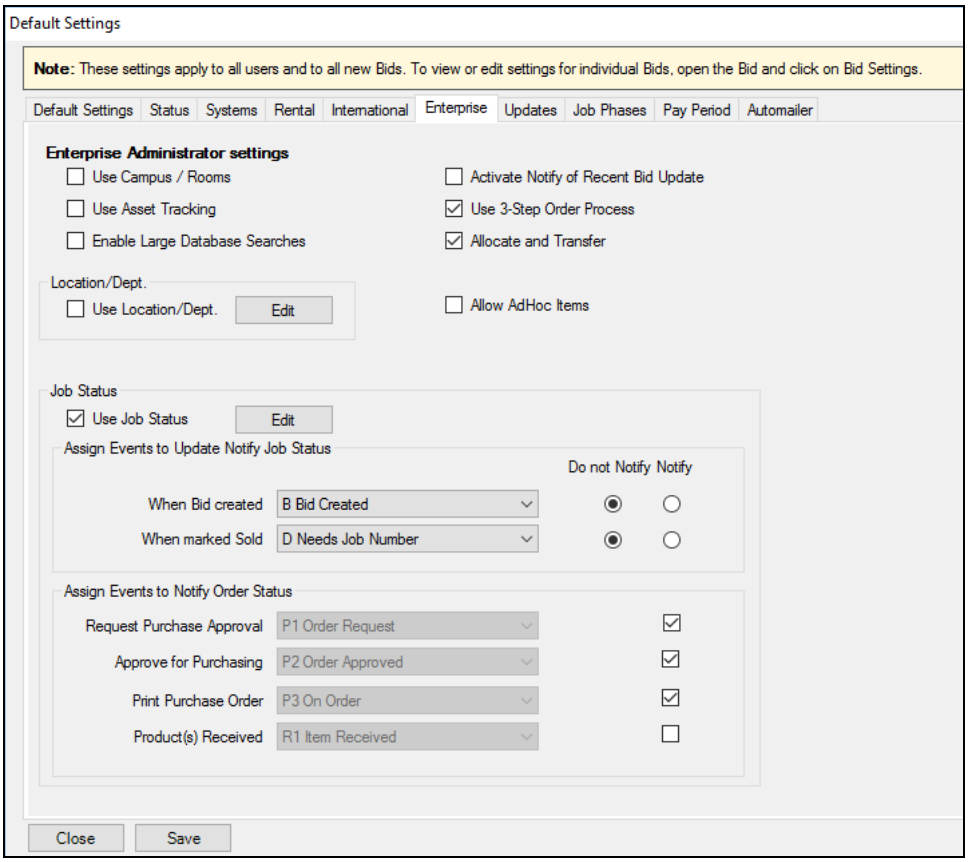
ENTERPRISE FEATURES (ENTERPRISE VERSION)

These features are for large companies that want to have complete management oversight of operations. Inventory management can be activated here. Managers can track the progress of each job with user defined Job Status. Automatic email notifications can be sent to assigned users whenever the status of a job is updated. Order Status Events for each Product can also update the Order Status and send email Notifications. Purchasing, Receiving and other functions can be assigned to specific users. Administrators can define a common data path for the BidMagic folders.

Default Settings (Enterprise Version)

Enterprise features can be setup from the Default Settings – Enterprise Tab. Please plan some time for initial setup of user locations/departments and permissions to perform selected tasks. **Note: Many Enterprise features will not be active until user permissions are set up in the User Manager.**



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ENTERPRISE ADMINSTRATOR SETTINGS

Use Campus/Rooms

Allows users to create unique rooms list for a client. For example: You are installing security cameras for a school district that has multiple school buildings or campuses. You can create a Campus named Central High School, and build a room list for classrooms 101-925. Then for South High School, you could build a room list for classrooms 101-550. This method works together with Asset Tracking to store data that can be tracked to the exact room and campus. This also allows you to manage unique room lists instead of dumping all new room names into the default room list that others will see all the time.

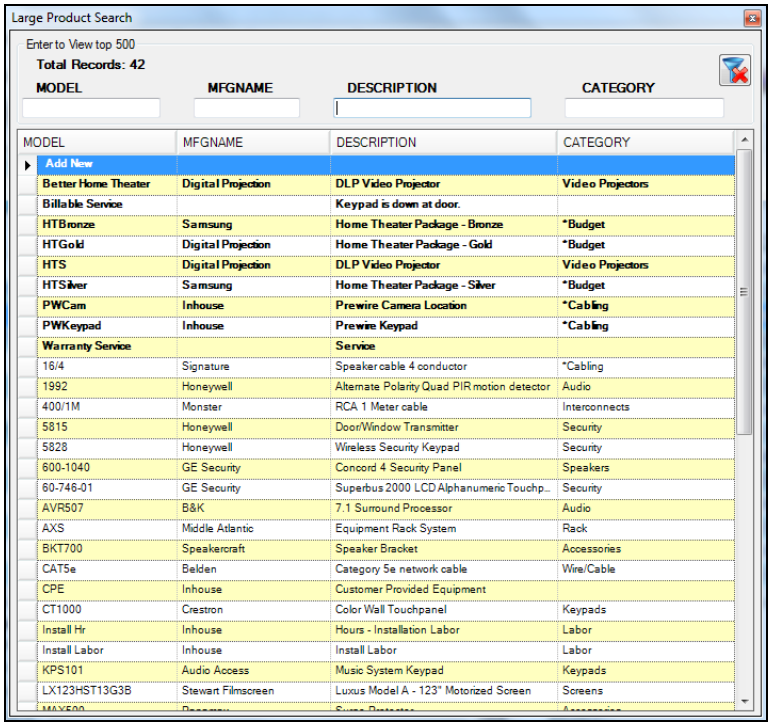
Asset Tracking

Allows users track up to 20 data points for each item in a bid. Now you can add important data like serial number, warranty expiration date, IP address, network password, cable number, etc. These can be searched instantly.

Standard Search results work this way: All Products load with favorites highlighted in bold at the top. (Highlight Favorites must be checked in the View Menu.) As the user types in the Power Search, items not selected in the search are 'filtered OUT' and are subtracted from the search.

Enable Large Database Product Search

This option delivers faster results with large product databases. This may result in much faster results if you have over 25,000 products in your table. When active, Search My Products opens a floating window that uses additive instead of subtractive filtering (no products load - type to add results) vs subtractive filtering (all products load – type to subtract products) The Enterprise version supports up to 250,000 products when this feature is active. Note: the Large Product search window does not close after every search, it can be kept open which is a powerful method to search and add many items to a bid quickly. **This new feature really rocks with dual monitors!**



Favorite products load highlighted in bold at the top. (limited to 500 Favorites and 5,000 total results) As the user types in the Power Search, items selected in the search are 'filtered IN' and are added to

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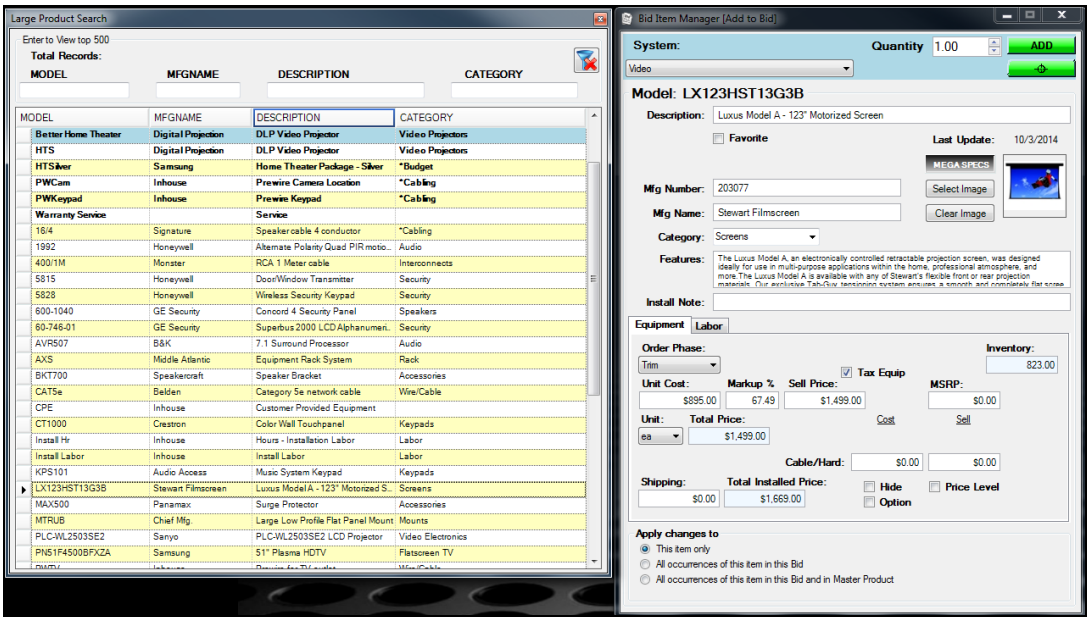
the search. The Category Finder normally found on the left panel is turned off by default, but Categories can be searched directly in Search My Products.



Note: The Large Product search window does not close after every search, it can be kept open which is a powerful method to search and add many items to a bid quickly. **This new feature really rocks with dual monitors!** The second monitor view for selecting products is shown above.

Activate Notify of Recent Bid Update
Alerts multiusers if a Bid has been opened by another user within the last 20 minutes. This is to caution you that someone else may be working on this bid right now.

Use 3 Step Order Process
Activates a three step order process, to set permissions so first user can request to order, next user can approve to order, next user can place order. Users with multiple permissions can set statuses directly and bypass any steps they have permission for. For example: click directly on Order Now if you have permissions to request and approve.

Allocate and Transfer
Activated ability to allocate products to a job and create packing lists to transfer from one location to another and receive at the other location.

Adhoc (Misc.) Products (Enterprise Feature)
Adhoc products are special one time, provisional use products for a single bid that do not appear in the Products table and product searches. This special feature was created so that salespeople can add new products to a bid when needed, but only as provisional products until approved. However, if that salesperson does not have permission to Add/Edit Products, the resulting new product will not be added to the Products Table. This special Adhoc or Misc product will begin with MISC_ and will appear ONLY in that Bid.

The plan is that another user with permission to Add/Edit products can open this bid to edit the Adhoc product and/or convert it into a standard product by removing the Adhoc flag. That will elevate this

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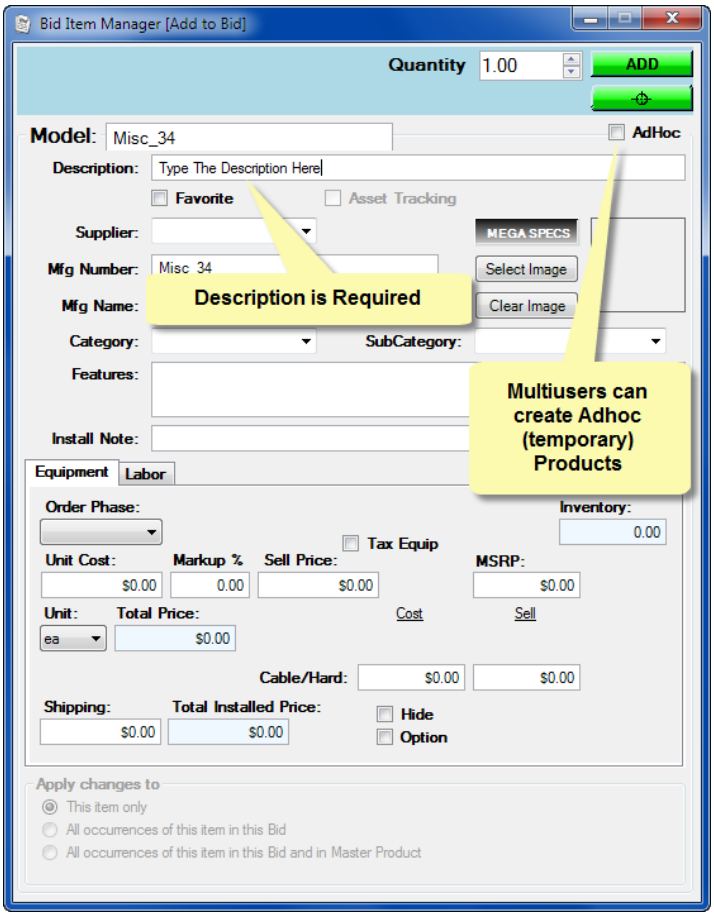
provisional product to a standard product which will appear in the Product Table for all and also allow it to be included in Purchase Order.

With that in mind, when a user who DOES have permission to Add/Edit Products clicks Add New they can choose create a standard or an Adhoc product. Options include renaming the automatically generated MISC_123 model number and checking or unchecking the Adhoc checkbox at any time.



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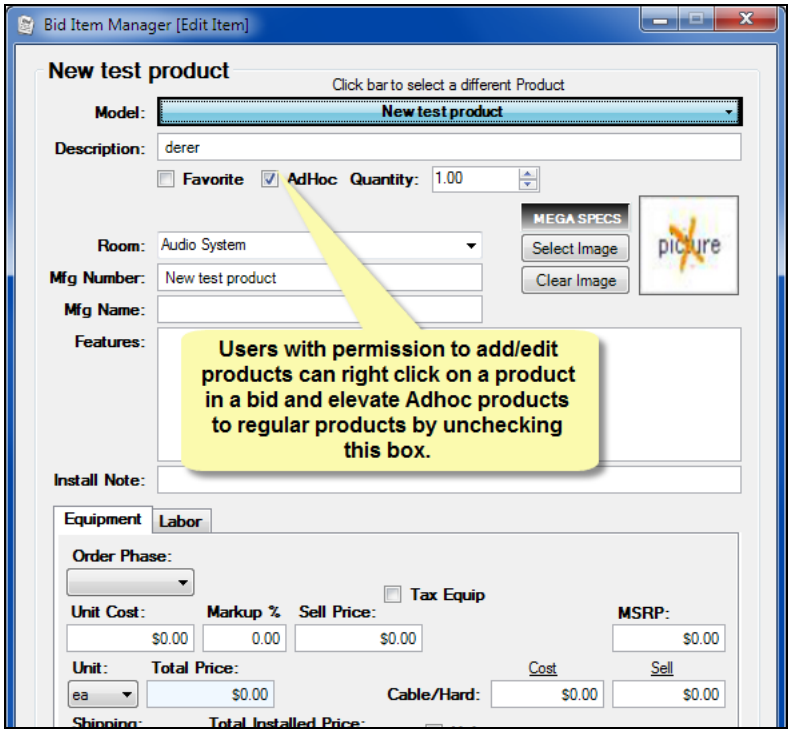

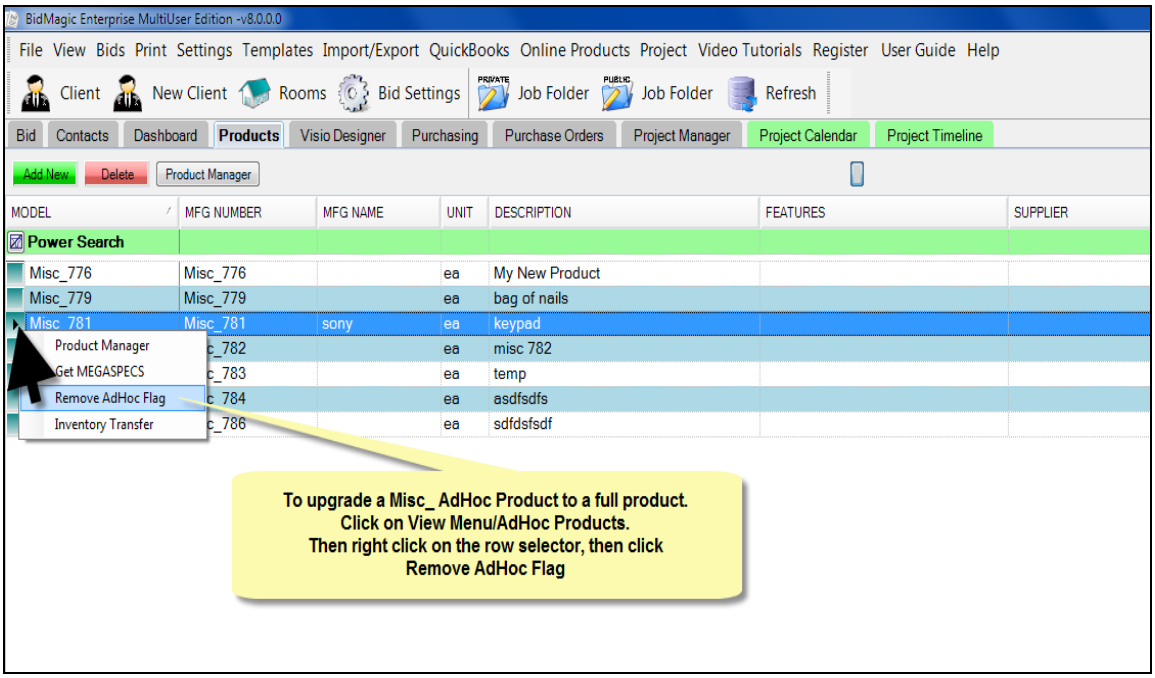

These features provide a workflow for salespeople to add products to a bid, but then require additional approval prior to selling, ordering etc. Adhoc Misc products must be upgraded to standard products prior to ordering.

View Adhoc Products

Click this to filter the Products table to view only those special products. Caution: When View Ad Hoc Products is checked, **you will view only Adhoc products. You will not see the rest of your Products**. Uncheck this for normal use.

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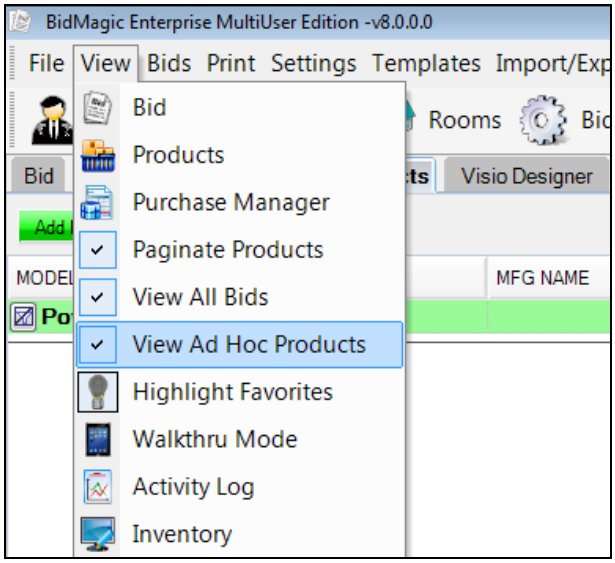

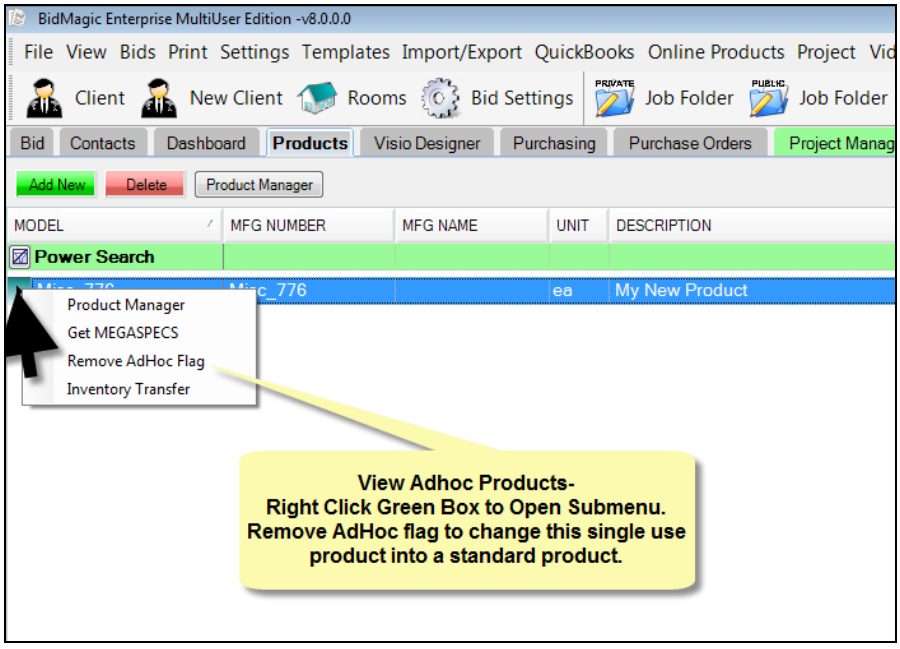

Multiple Locations or Departments (Enterprise Feature)
Companies with multiple locations or departments can create locations and input alternate addresses and contact information for each. This can be used to partition each group of users for tracking and inventory purposes. Each location creates a separate inventory. This info will appear in reports associated with each location. Check the Use Location box to activate this feature.

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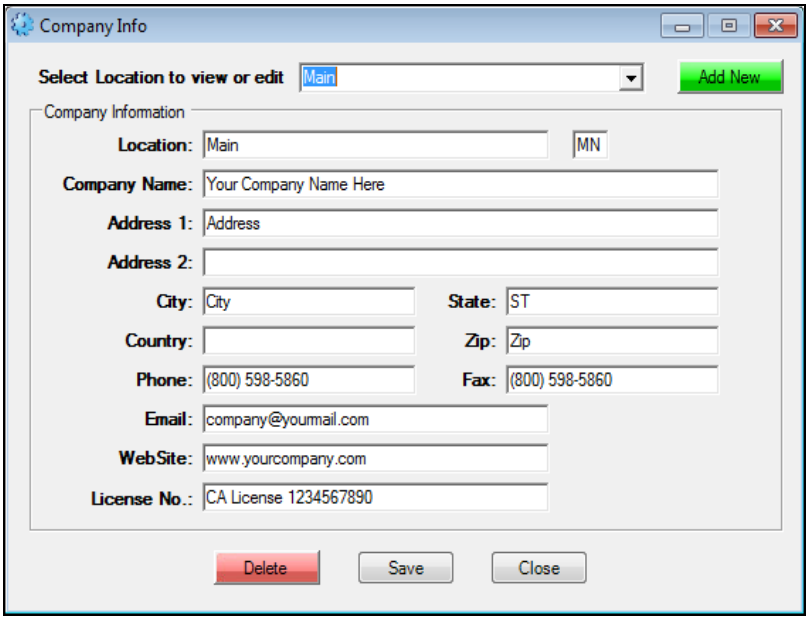
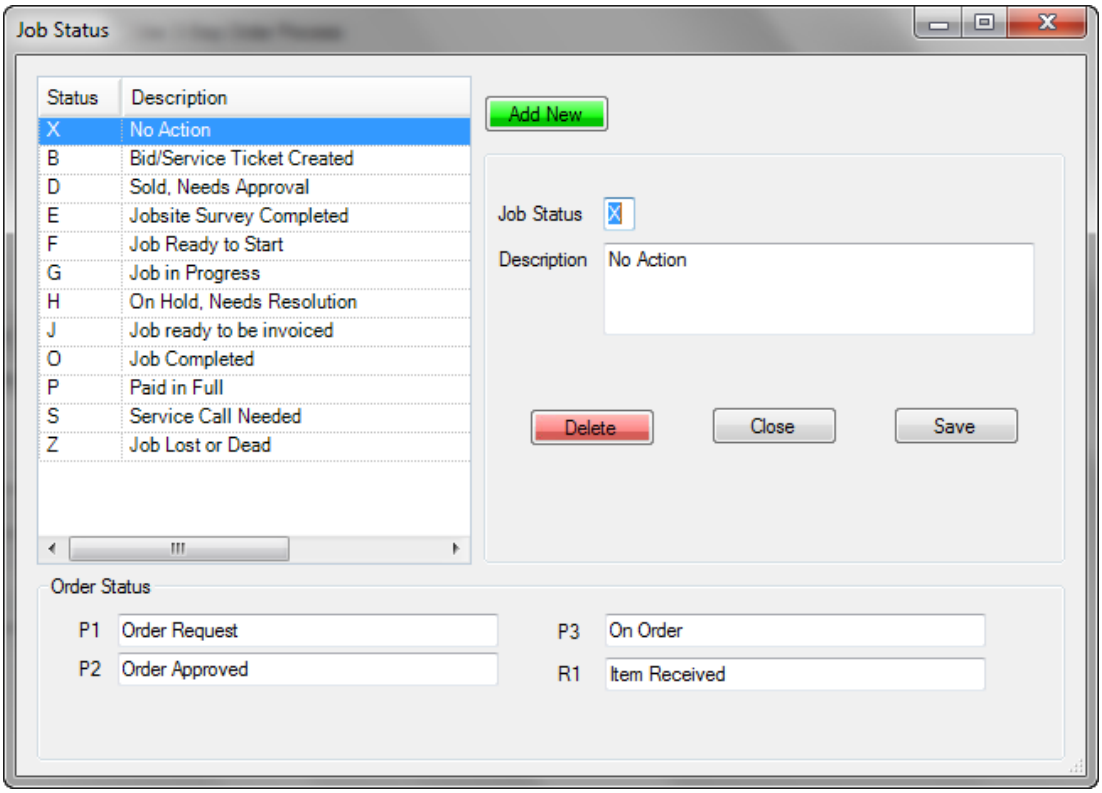


JOB STATUS SETUP – DEFAULT SETTINGS/ENTERPRISE (ENTERPRISE FEATURE)

You can create Job Statuses that fit your workflow. This form lets you add, edit or delete Job Statuses that generate automatic email notifications and are used to track job progress.
If you create a new Job Status, assign a letter to it and be sure to assign permission for users to set to the Status and/or be included in email notifications.



Job Status and Automatic email Notifications – User Manager/Enterprise Settings
The checkboxes below assign how BidMagic users will be notified for each job. When set up properly, users will receive notifications when they need to know and will not receive extra notifications that are not relevant to their work.

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Example: The user below will be notified when there is an invoice to do for All Jobs. However they will only be notified when a contract is executed for Their Jobs. A project manager would typically like to receive notifications only when it relates to their assigned jobs.

Setting up Automatic email Notification Rules:
Step 1 - User Settings/Job Notifications Screen:
If required all jobs is checked, user will receive notification for ALL jobs for this status. (regardless of settings in step 2.)

If My Jobs is checked, user will receive notification for only their jobs (depending on settings in step 2.)

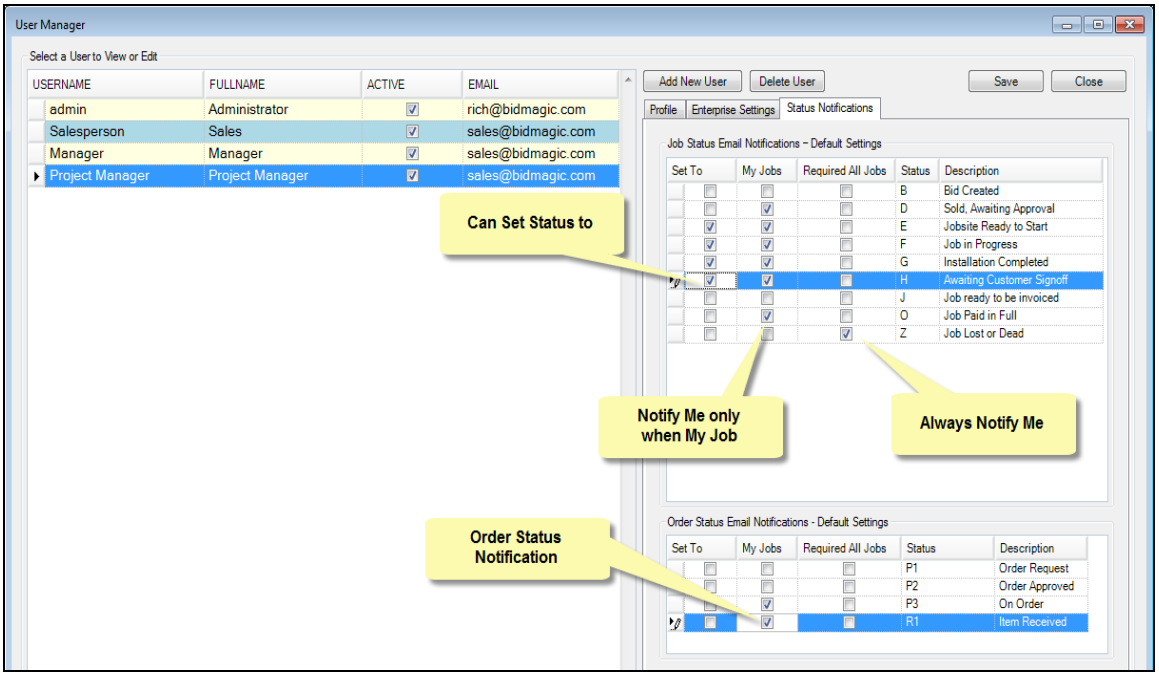
Step 2 – Bid/Job Settings:
If user settings in step 1 include notify MY Jobs, then BidMagic needs to know which jobs are YOUR jobs. For each Bid/Job this is defined in the Bid/Job Settings screen below.

Click preferred status MY JOB below to include this user in notifications for their preferred statuses that were defined in step 1.

If ALL statuses is checked, then the user below will be notified for ALL status changes on this job (regardless of the user settings in step 1.) The bid creator is automatically defaulted for notify all, but this can be easily changed in the screen below.

Add additional email recipients in the Other E-Mail boxes. Emails will be sent to those addresses whenever a status changed. Add any notes to include in the email notifications.

Manage Enterprise User Settings (Enterprise Version)
This screen allows admins to assign user permissions for management control and purchasing features.



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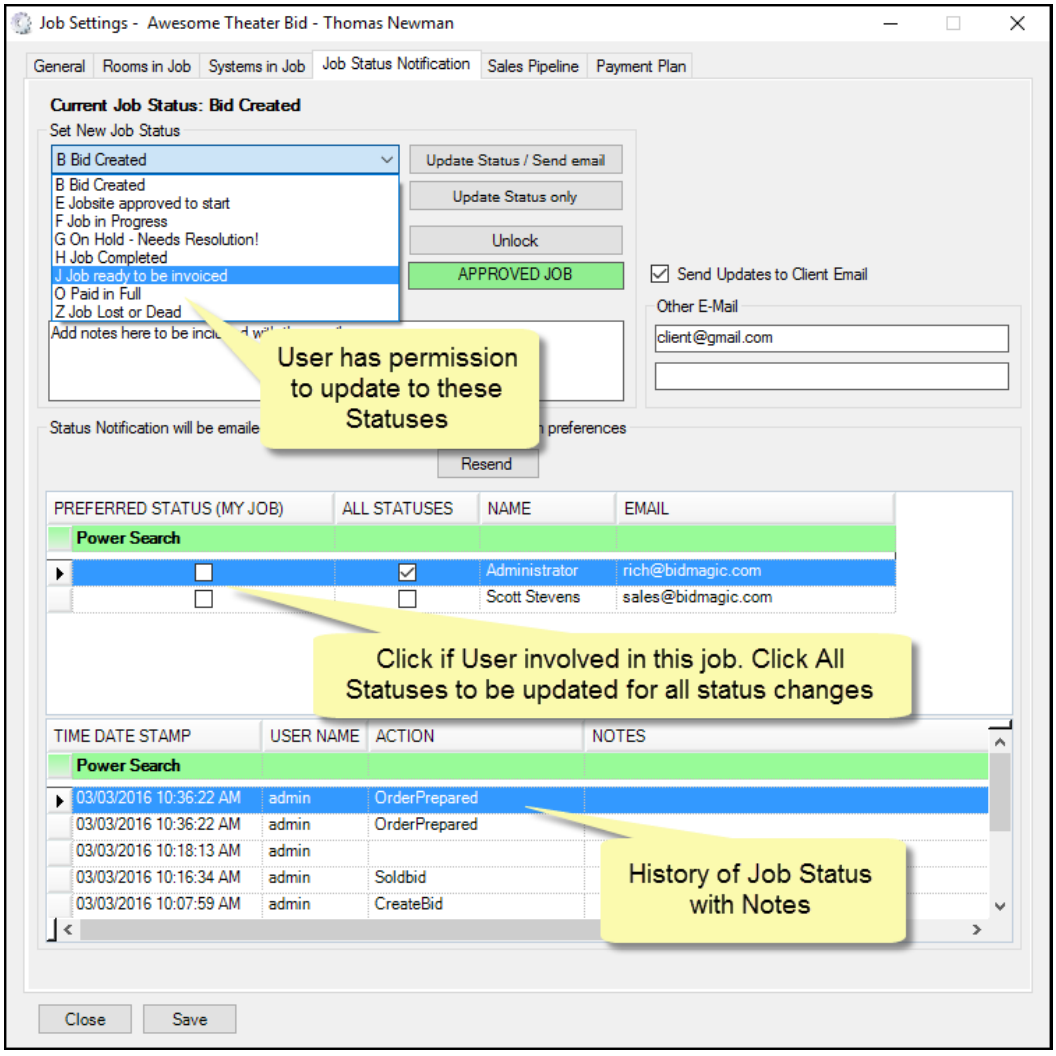
Settings/Company Info
Enter information about your company as you want it to appear in BidMagic reports. If you want to add your contractor license number. We suggest including the word “License:” in the entry box before your number. Example: AZ License: 123456789.

Job Status (Enterprise Version)
Users can setup automatic email notification preferences. For each Job Status choose to be notified for My Jobs or Required for All Jobs. The first column Set To checkboxes display statuses a user has permission to Set To. In the example below, the user has permission to advance the status to Job ready to be invoiced, but not set to Job Lost or Dead. They will receive email notifications for all jobs when completed, but only for their jobs when a bid is created. By default, the bid creator will receive notifications for all status change.



Global Status and Notification Settings (Enterprise Version)
The Job Status screen assigns permissions for users to advance jobs to selected Job Statuses. The notification screen also lets administrators select when users will receive automatic email notifications. Check each Status for My Jobs (Preferred) or All Jobs (Required). The Job Settings for lets users further assign those to receive notifications for each individual job. If Required All is checked, the selected user will always receive notifications for the selected Status. When new Job Statuses are created, be sure to add permissions for users who need them. Notifications can also be set by the users in Settings/Default Settings/Status Menu.

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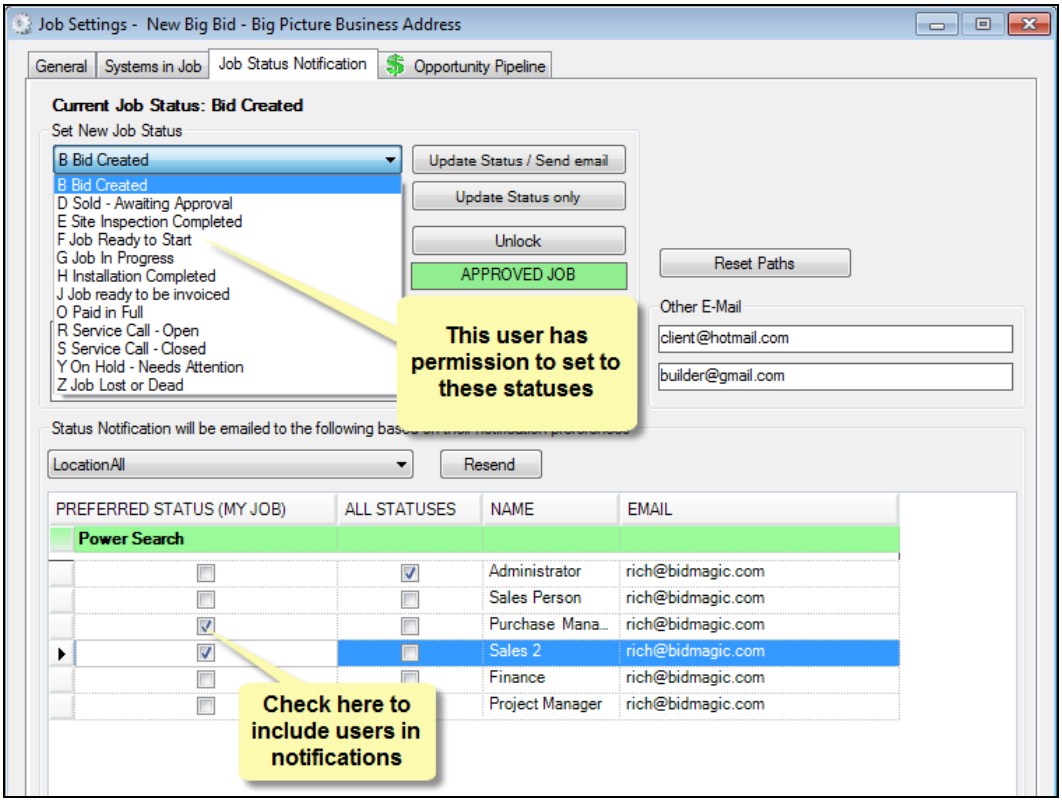
User Job Status Settings (Enterprise)
This is a permission based form that allows users to control when they will receive automatic email notifications when Job Status is updated. Checking 'Set to' means the user can advance a Job to that Status. If 'My Jobs' is checked, user will be notified only for the Jobs they are assigned to. Checking 'Required All Jobs' sends notifications for all Jobs when the selected Status is updated.



Understanding Notification Rules:
Check Notification **Required All Jobs** for each status that you want to notify you for **All** jobs.
Check Notification **My Jobs** for each status that you want to notify your for only **Your** jobs.

For example, the person in charge of invoicing the customer should set Required All Jobs to be notified whenever any job needs to be invoiced. A project manager would check My Jobs to be avoid unneeded notifications for projects they are not involved with. The Bid Settings checkboxes allow you to select which jobs you wish to be notified about.

To Receive notifications for Your Jobs, Open the Bid Settings form/Job Status Notification Tab and Check Preferred Status (My Job). Checking this box shows that this is Your Job. Check this box for any project managers, supervisors or staff that need to be updated about the progress of this job.

There is another option for anyone who wants to be notified for ALL STATUS changes in this job. That might include the sales person or project manager. in the BidThe Bid Settings includes all needed info on Status update. Order Status notifications also list the specific products ordered and received.

Sample email notification. Detail includes all needed info on Status update. Order Status notifications also list the specific products ordered and received.

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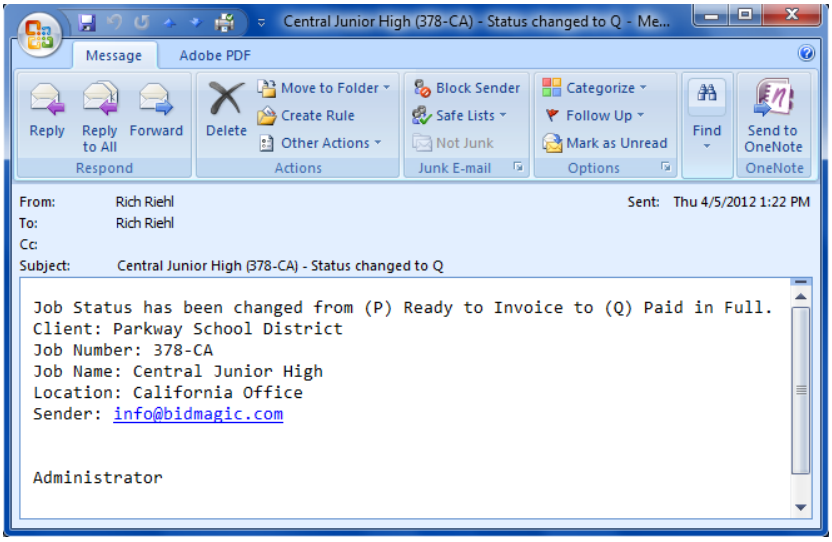
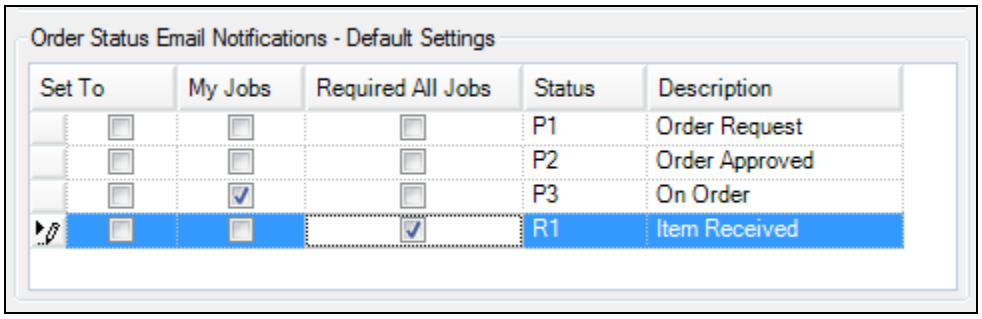


Order Status Notifications (Enterprise Feature)
BidMagic tracks the Order Status for every product in a job and can send automatic email notifications when the Order Status changes. A history of Job statuses is seen in the Bid Settings/Job Status tab. The Dashboard and Bid Settings display the current Job Status for each Job. The Order Status notification emails also include a list of all of the products ordered or received. The Dashboard does not display Order Status info for every product in the Job. That can be viewed on the Purchasing Page.

The Set To column on this screen is not editable, but refers to the purchasing permissions in the Enterprise User Settings Tab. Note: Email notifications can be sent when products On Order or Item Received if checked in the settings shown here. Notifications are not sent for Order Request and Order Approved as those are internal functions.



Job Status Filter (Enterprise)
The Dashboard Tab can function as a To Do List for multiple users. Setting the Filter to find the status ‘Approved to Order Products’, ‘Jobsite Ready to Start’, ‘Ready to Invoice’ enables users to locate Bids, Jobs and Service Calls needing their attention. The Job Status filter settings allow users to view the results of several favorite choices. These favorites are like a home page that automatically contains the Projects of interest for each user.

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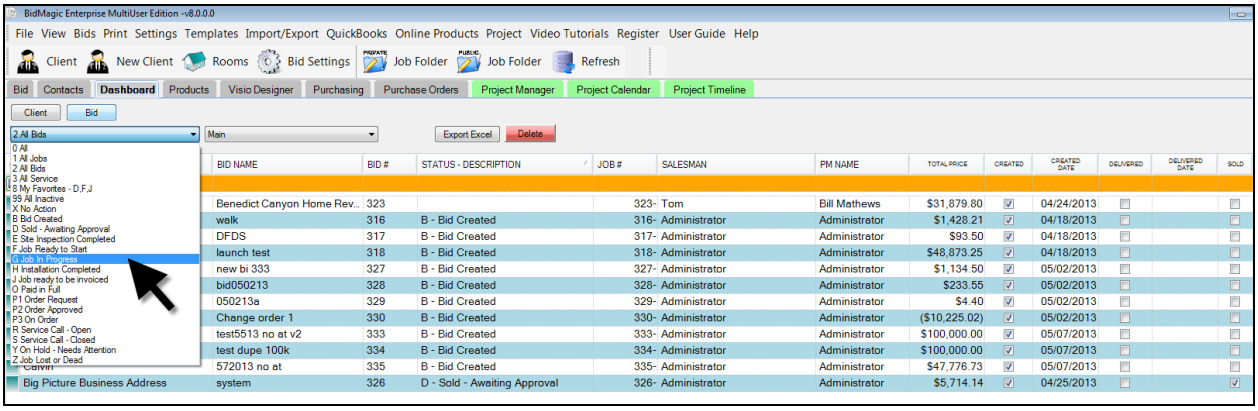
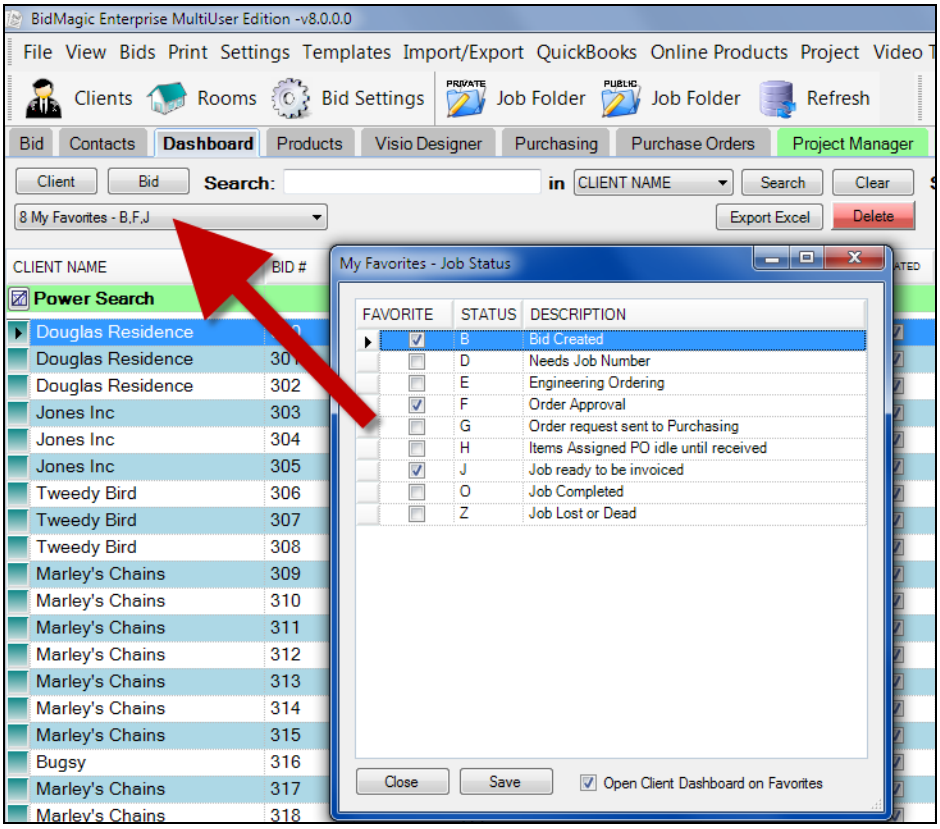


My Favorites – Job Status – My To Do List

In the Settings Menu/Job Status Filter, users can setup their Favorite Statuses to watch in the Dashboard. This is helpful for each user to manage their tasks in a personal To Do List. Check each Status you want to add to your Favorites. These will appear in the Dashboard under 8- My Favorites in the Filter Choices.



Assign Events to Automatically Advance Job and Order Status (Enterprise Feature)

This screen allows Job Status to automatically advance the current status when certain events occur, like Bid submitted, sold, etc. Use Status X-No Action if you do not want the action to change the current status.

The lower section of the form allows users to send email notifications whenever product order events occur. Notifications contain the list of products involved. These purchase events are pre-assigned, but the radio buttons provide choices to set status and/or send notifications.

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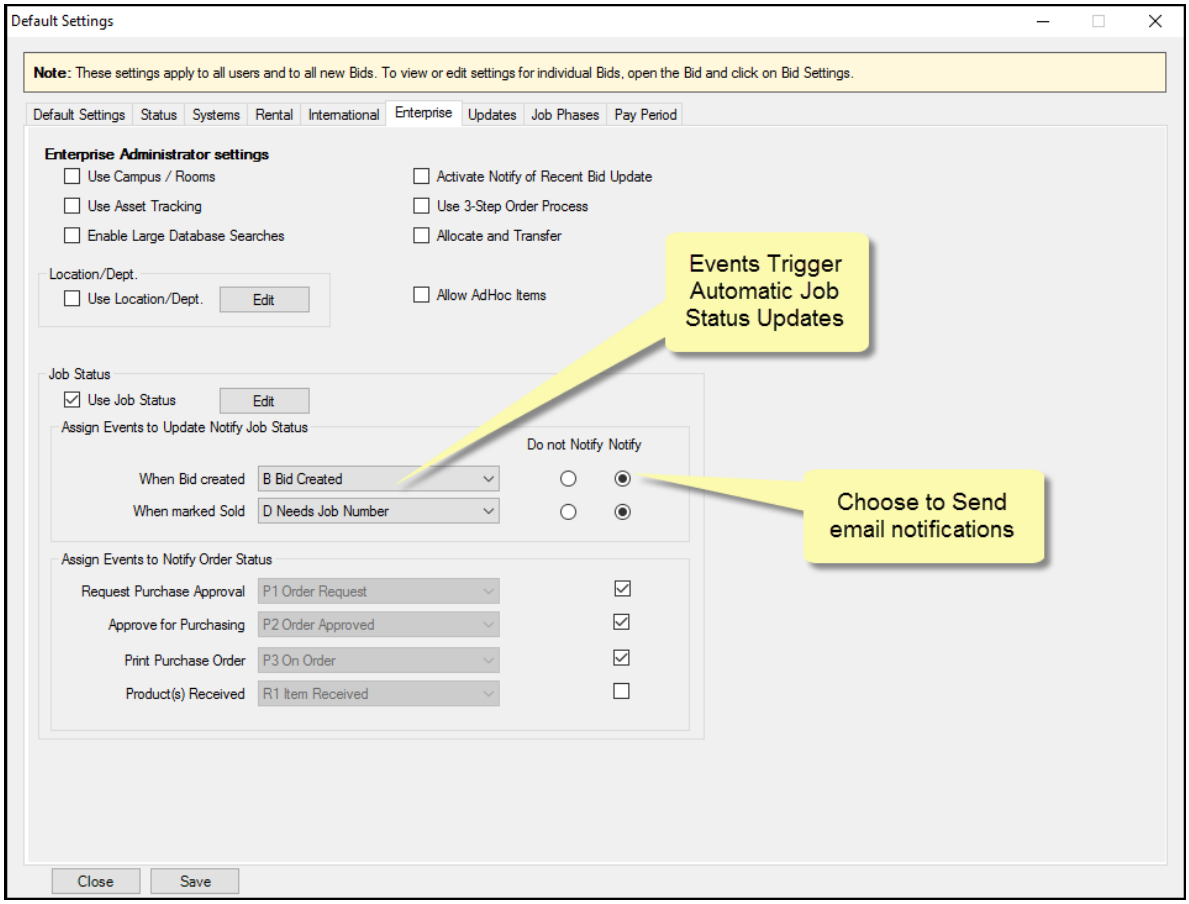

JOB STATUS & ORDER STATUS SETUP WORKSHEET

Here is a sample worksheet to setup the workflow that matches the action steps of your company. Then you can track the status and receive automatic email notifications when desired. Each Status has a code so that you can establish the normal sequence of events. We suggest that each action step should be set to notify the user who can sign off and advance to the next status. Steps do not have to be done in order. Note that products cannot be ordered and jobs cannot be scheduled until they have been marked sold. The sales person automatically receives all notifications for the bids/jobs they created. When products are ordered or received, email notifications include the list of products and can be directed installers in the field, especially for distant jobs.

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Click User Guide > Enterprise Setup Guide in BidMagic for complete setup and deployment planning resources.
S= Set to Status
NM = Notify My Jobs
NA = Notify All Jobs

Code	Job Status	Sales	Mgr	Proj Mgr	Accting	Purchasing
A	Bid Created	S - NM	NA			
B	Bid Sold	S - NM	NA			
C	Job Approved	- NM	S - NA			
D	Jobsite Survey Complete	- NM	NA	S - NM		-NA
E	Job on Hold – Needs Resolution	- NM	NA	S - NM		S
F	Jobsite Ready	- NM	NA	S - NM		
G	Job In Progress	- NM	NA	S - NM		
H	Job Complete & Signed off	- NM	S - NA	S - NM	- NA	
I	Invoice Sent	- NM	NA		S -	
J	Paid In Full	- NM	NA		S -	

Code	Order Status - Per Product	Sales	Mgr	Proj Mgr	Accting	Purchasing
P1	Purchase Order Request	NM		S		S - NA
P2	Order Approved	NM	S - NA	- NM		S - NA
P3	Purchase Order Created	NM		- NM	- NA	S - NA
R	Received	NM		- NM	- NA	S - NA

Job Status Notifications in Bid Settings (Enterprise Version)
The Job Notifications can be assigned in the Bid Settings for each job. If a user appears in this list, they can be set to receive notifications for all status changes, preferred status changes or no notifications. If a users notifictions are required they will always receive their preferred notifications regardless of Job Settings. The bid creator will default to receive all Notifications for their jobs. That can be changed per job as needed. Users can create notes here that are included in the text of email notifications. Add additional emails addresses for others who you wish to notify.

These two Notification forms are designed to work together to simplify the process of selecting and sending notifications to each user based on their role in the organization and project.

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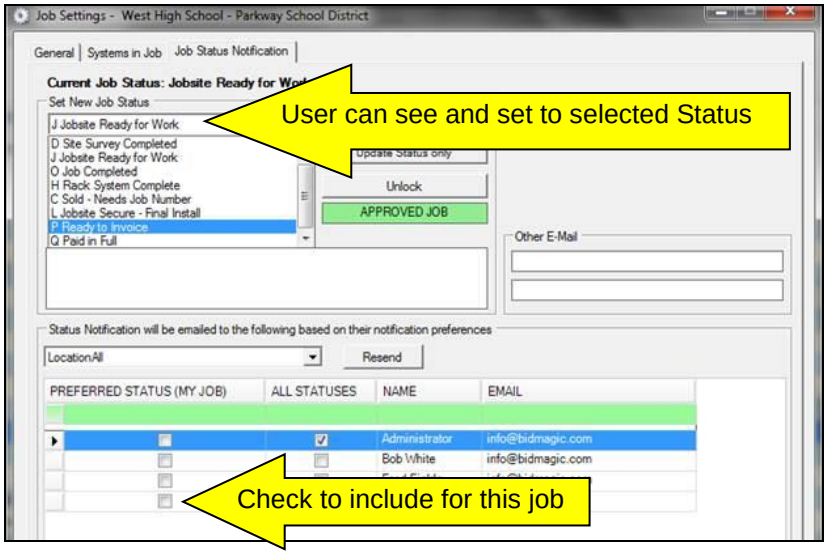
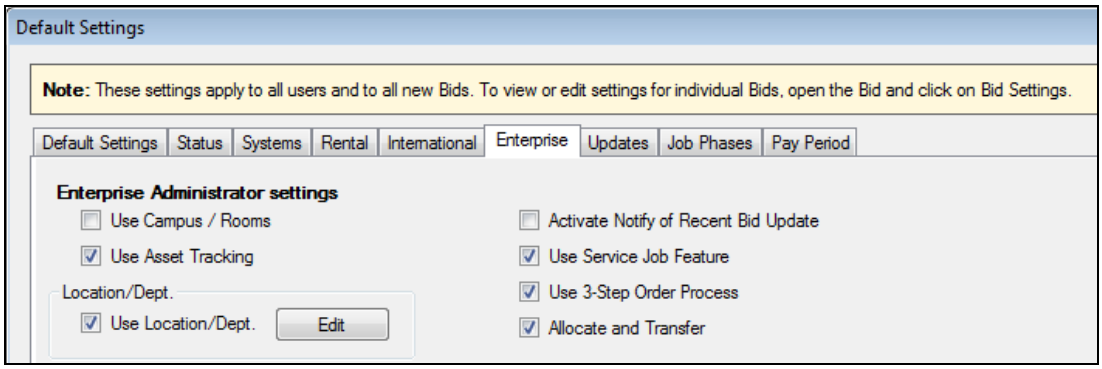


The Bid Settings for each Bid let users view and advance the Job Status if they have been granted permission. Note: The Set New Job Status dropdown box will show and allow changes for the Statuses that each user has permission to Set to. For example, the Set to checkbox in the illustration above must be checked for that Status choice to be visible to the user in the Job Settings form above.



3 Step Order Process (Enterprise Version)

The Enterprise version also includes a powerful 3 step order process option in Enterprise default settings for companies who want to manage a formal ordering process with order requests, then order approval, then order the products. When 3 step ordering is on, it provides additional checkboxes on both the Project Manager Screen and the Purchasing Screen. Administrators can assign permission as to which users can perform which steps.

When 3 step ordering is on, we recommend setting permissions so that general users can request and approve products from the Project Manager screen, which is the per job view. Then, restrict access to the Purchasing Screen to only the Purchase Manager, who can then view and manage all requests on the central screen, which is the global view.

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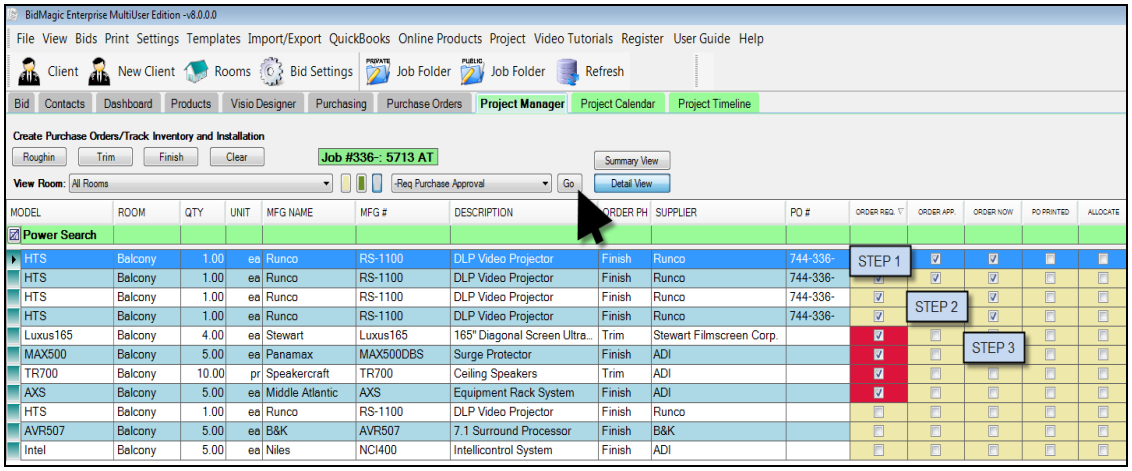

The checkboxes in the Project Manager and Purchasing screens show the steps for the order status of each product. Check the item(s) that you wish to order, these items will be hightlighted in red (loaded and ready) then click Go to complete the order step. This creates an enforced 3 step order process.

3 Step Order Process Workflow:
Here is the intended workflow for 3 users with the appropriate permissions:
Step 1: The first user checks the first checkbox – Order Request for a product(s), highlighting the choice(s) in red, then the user clicks (Req Purchase Approval) in the action menu, then hits the Go button. This sends an email to the user who has permission to approve this request.

Step 2: The second user clicks the second checkbox - Order Approved (Order App) checkboxes to approve selected products. This highlights the choices in red the clicks Approved for Purchasing – then hits the GO button. This sends another notification email to the user who can order the products.
Step 3: The third user (generally purchasing manager) sees that these items have been approved to order and checks the third checkbox – Order Now and hit the GO button.This creates Purchase Orders for the selected products and then checks the On Order Box. On Order indicates the product in included in a PO that has been printed.

Note: It is possible to provide multiple ordering permissions to a single user to allow them to perform multiple steps. Clicking on a checkbox also provides the option to Reset Purchase Status in the dropdown action menu. Each step can only be reset from right to left – one step at a time. Once a product has been added to a PO, you cannot reset the order status in this way. You must open the PO and delete the product there, which will reset the status to allow you to order again.

This new search window allows Purchase Managers to view Products by Order Status, to easily locate all products that are in the ordering process.

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CENTRAL PURCHASING (ENTERPRISE VERSION)

Central purchasing is one of the key features of the Enterprise version. This allows users to manage the process of purchasing, receiving, shipping, transferring and inventory control with powerful, professional tools. The Project Management screen is included with all versions of BidMagic and is designed for ordering and receiving on a per job basis.

The Enterprise version adds additional Purchasing and Purchase Order screens along with the ability to allow or deny access to these features via administrative permissions and approvals. This screen allows users to view and order products needed across multiple jobs and combine Purchase Orders or order additional products that are not included in a specific Bid. Use this screen in conjunction with the Project Management screen (single job view) as needed.

PURCHASING SCREEN

The Central Purchasing screen is designed to allow purchase managers to view and select products, create Purchase Orders, create Packing Lists and additional functions shown in the action menu. This screen is designed to consolidate central purchasing operations. Products can be selected and ordered for multiple jobs and products can also be ordered that are not contained in the proposal. Filter view by all jobs or a specific job. Search functions are provided for ease of use.

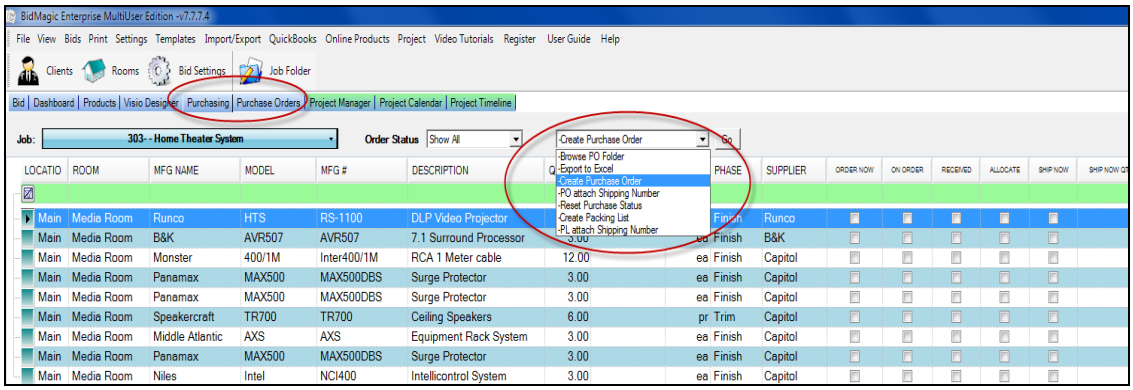
Users with Permission for the Central Purchasing screen can manage purchasing, receiving, tracking, etc. Select a single Job or click on All Jobs. The Model Finder control even allows users to purchase products that are not in the Bid. This creates new PO's that are grouped with that Client.

Click the blue Job button to select products needed for a single job or to view all jobs. (The Purchasing screen does not load until you make this choice.) Open the Purchasing screen and click on the blue Job button to view products needed for a single Job or for all Jobs. The top green power filter makes it fast and easy to apply multiple filter choices to the screen results. Type choices in any column to narrow your search. Note: Checkbox columns can be filtered by typing True (T) of False (F) to make a selection.

Suggested Purchasing Workflow

Type the name of a Supplier in that column to filter. Then click on Order Status dropdown box to find products that need to be ordered. Then double click on The Order Now header to select all of the products shown. Then click Create Purchase Order. Right Click on any PO number to open it.

Click on a funnel to clear an entry or hit the Escape key. Click on the Clear Filters Icon or the left funnel to clear all filters.



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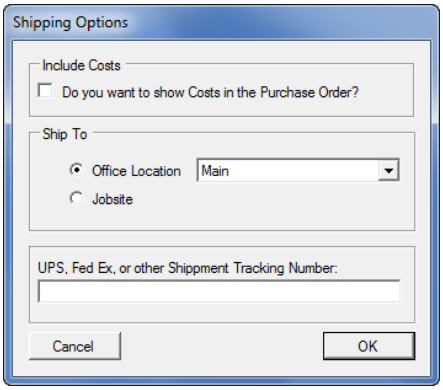
Purchase Order Shipping Options

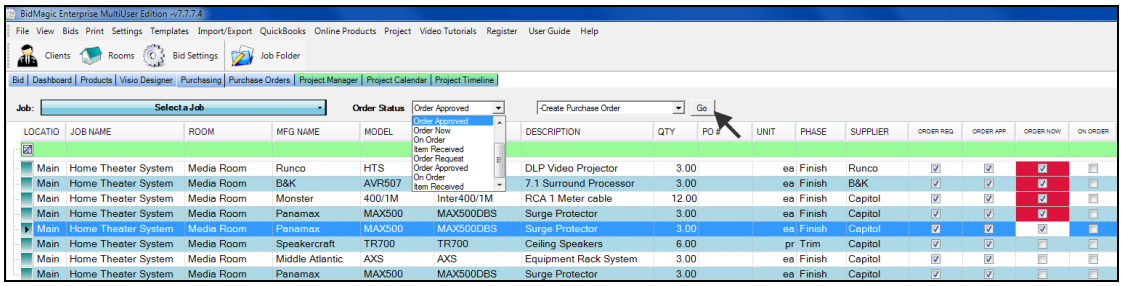
When printing a purchase order, select the location where you want the products shipped. (Main, Los Angeles, New York, etc.) You can also select to ship to the jobsite, which is the same as the Ship to selection associated with that bid.



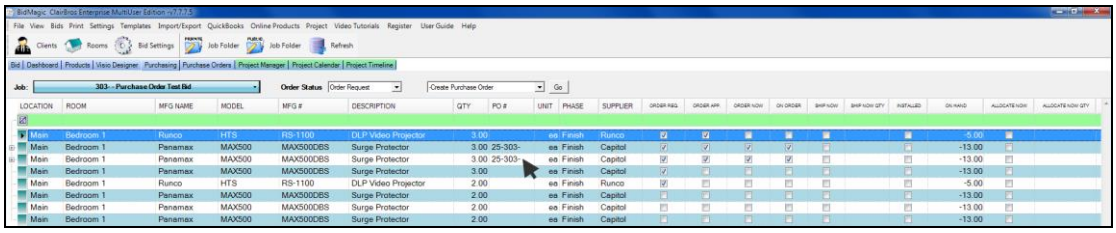
CENTRAL PURCHASING WORKFLOW

The Enterprise version includes powerful control for a complete purchasing workflow. After users request and approve products for ordering, the Purchase Manager can take control of the remaining steps from the Purchasing and Purchase Order screens where all jobs and products can be seen and managed from a global perspective. Some functions are only available in the Detail View.

The order status filter makes it easy for the Purchase Manager to select products that are in preorder status, requested, approved, on order, etc. Check Order Now to select products to send to a Purchase Order. Select Create Purchase Order in the action menu, then click Go to create a new Purchase Order. This screen with then show the purchase order number and the PO will appear on the Purchase Order screen. On order indicates that the PO for this product has been printed, emailed to the supplier or sent to QuickBooks.



After Products are added to Purchase Orders, the PO number will be shown on this screen. Simply right click on that PO number to open that PO on the Purchase Order screen.



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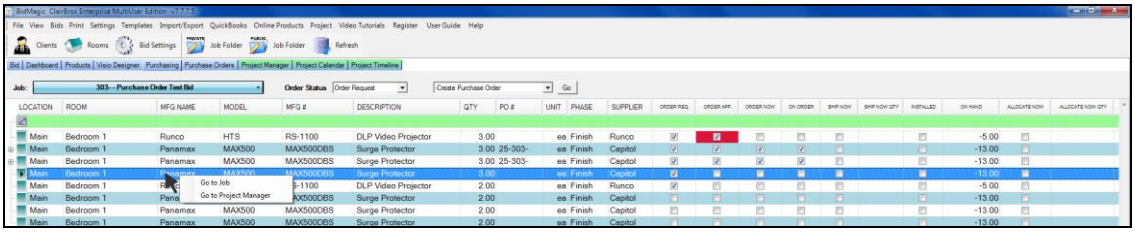
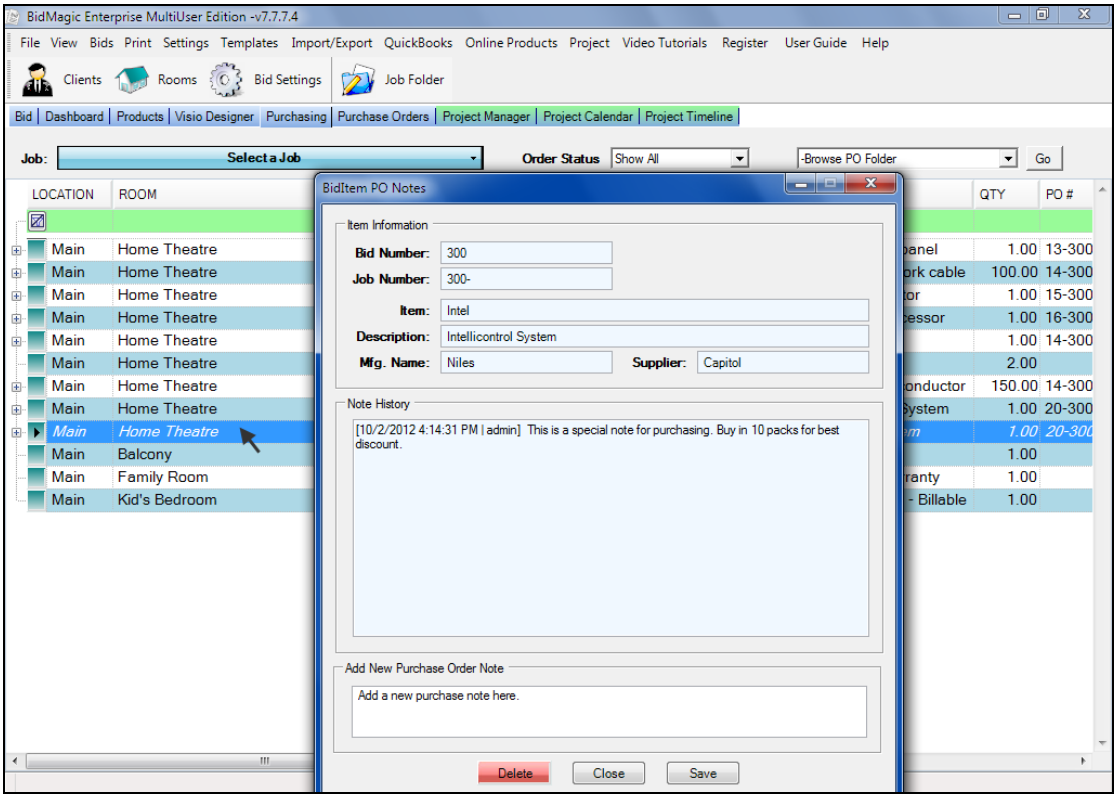
Right click on any column to open the navigation menu, which can open the Project Manager or the Job (Bid)

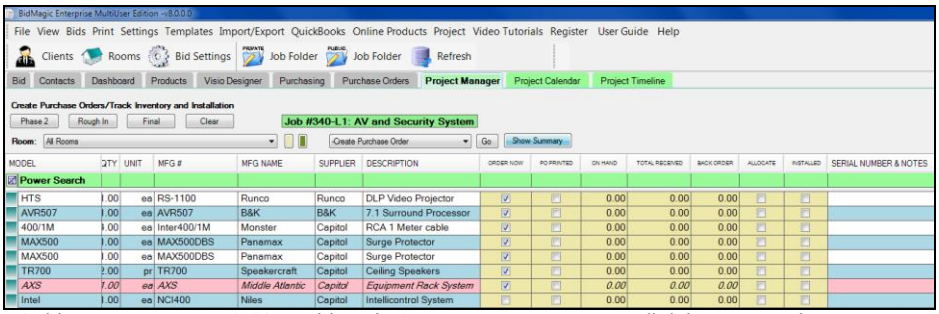


Purchase Notes (Enterprise Feature)

Users can attach notes for the purchasing department. CTL/Right Click on any line item in a Bid to add a note for purchasing. All notes for the line item are stored in the note history in the top panel.



Products with purchase notes attached are highlighted in pink on the Project Management, Purchasing and Purchase Order screens.



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STEP BY STEP RECEIVING & INVENTORY MANAGEMENT WORKFLOW

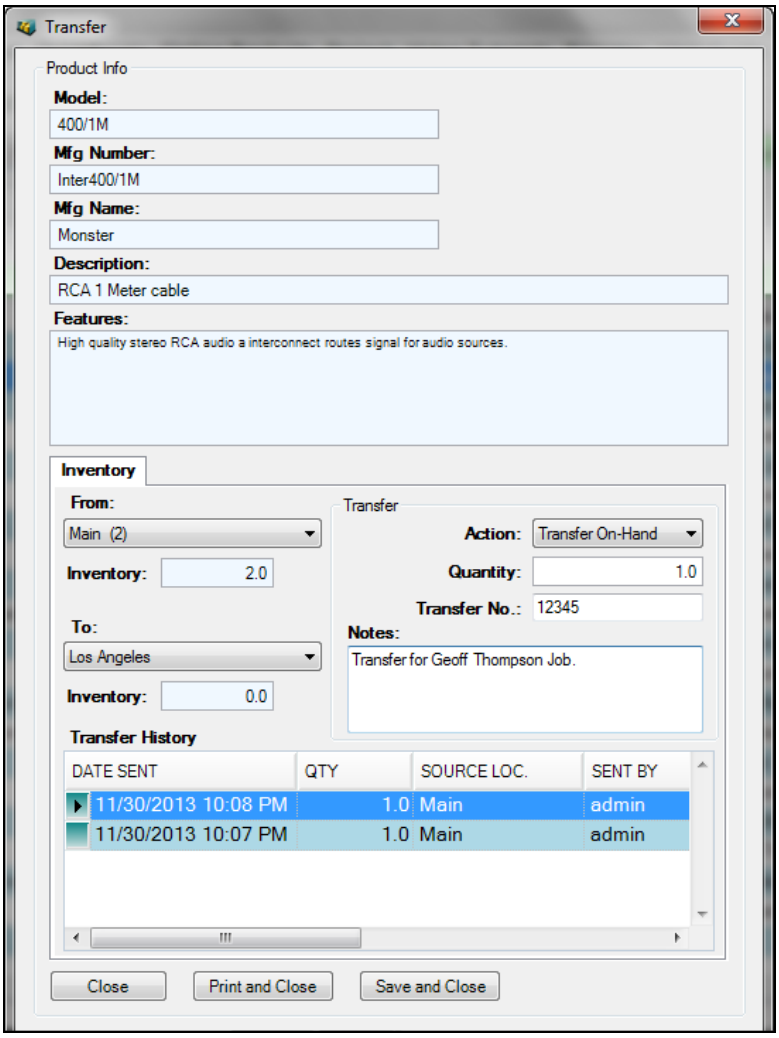
The Enterprise version includes powerful control for a complete receiving and inventory management workflow. These steps are performed from the Purchasing screen.

Receiving Products in a Purchase Order

Make sure you are in the Detail View. Check the boxes for each product that is being received. BidMagic will expect that you are receiving the same quantity that was ordered, but you can override that value and enter a different amount when needed. The selected products will be highlighted in red. Select Receive Now in the action menu, then click Go to complete the process.

Allocating Products

Check the boxes for each product that is being allocated BidMagic will expect that you are receiving the same quantity that was ordered, but you can override that value and enter a different amount when needed. Products can be un-allocated when needed.



Transferring Products and Inventory

Check the boxes for each product that is being received. BidMagic will expect that you are transferring the same quantity that was ordered, but you can override that value and enter a different amount when needed. The selected products will be highlighted in red. Select Transfer Now in the action menu, then click Go to complete the process. These products will be transferred to the “InTransit” Inventory and can later be received at another location, department or inventory location.

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There is also an option to Transfer and Receive in a single step when desired.

Transferring Inventory is not the same as shipping to a client or jobsite. Shipping an item has no impact on inventory. Products can only be shipped once.

Ship Now – Create Packing Lists
The Purchasing screen can create packing lists for products that are shipped to a jobsite or other recipient. Shipping does not change the inventory allocation for the products, it just ships them and creates packing lists. Check the boxes for each product that is being shipped. BidMagic will expect that you are shipping the same quantity that is needed, but you can override that value and enter a different amount when needed. The selected products will be highlighted in red. Select Ship Now in the action menu, then click Go to complete the process. Shipping an item has no impact on inventory. Products can only be shipped once.

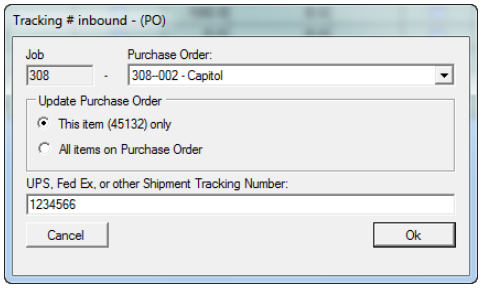
Here is the intended workflow. A product is received into inventory at the Main Office in New York. Then it is allocated to Job 314. Then it is shipped (or submitted) and then received at the jobsite.

If needed, the product can be allocated to a job, then transferred to the inventory of the California office, which receives the transfer. Then the California office ships (or delivers) the product to the jobsite.

TRACKING NUMBERS (ENTERPRISE)

When ordering products in the Purchase Manager or Project Manager screens, you can record the tracking numbers for incoming and outgoing shipments when created or right click on that item in the Project Manager (detail view only) screens to add or edit Tracking numbers later. Tracking# In refers to incoming shipments (Purchase Orders). Tracking# Out refers to outgoing shipments (Packing Lists).

You can choose to apply entries or changes to Tracking Numbers for just the selected product or apply to all products on the Purchase Order.



Users can search for Tracking Numbers in the Purchase Mgmt. Screen to lookup shipment info. There is also a choice to Browse the Purchase Order Folders based on Job Names.

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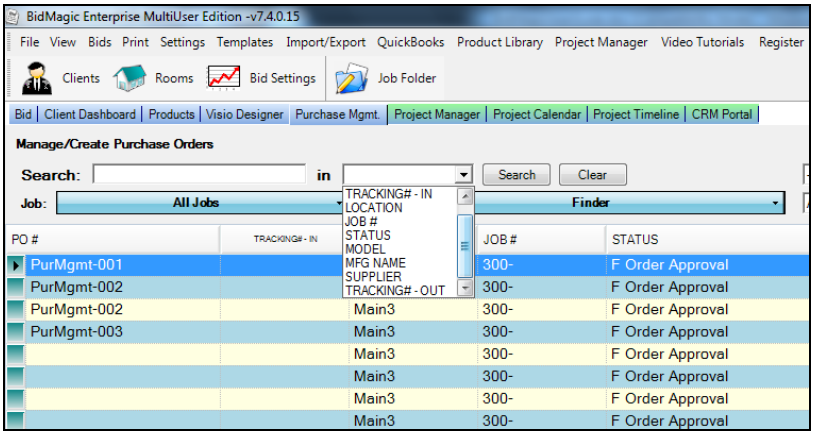
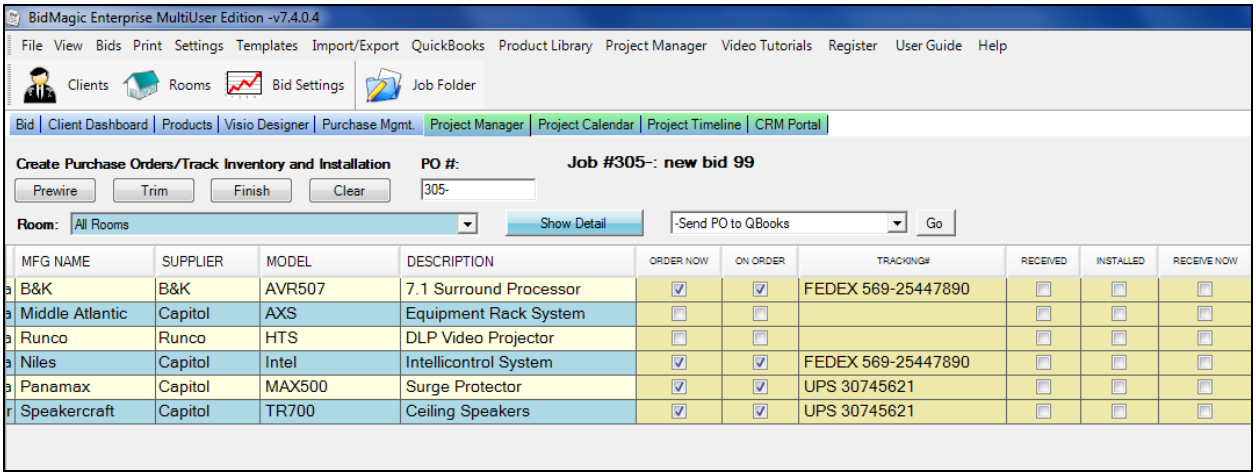


Tracking and Shipping numbers also appear in the Project Manager screen, which is designed to work with one job at a time. Packing List functions and Tracking Numbers appear here only in the Detail View. (Show Detail/Show Summary button). Right click on the Tracking# to add or edit the contents.



Activity Log (Enterprise version)

BidMagic keeps a time/date record for user activities in the software. This provides a helpful means to view and locate various activities like Bid Created, Sold Bid, Order Placed, Products Received and more. Filters allow you to search by Job Number, User Name and date range.

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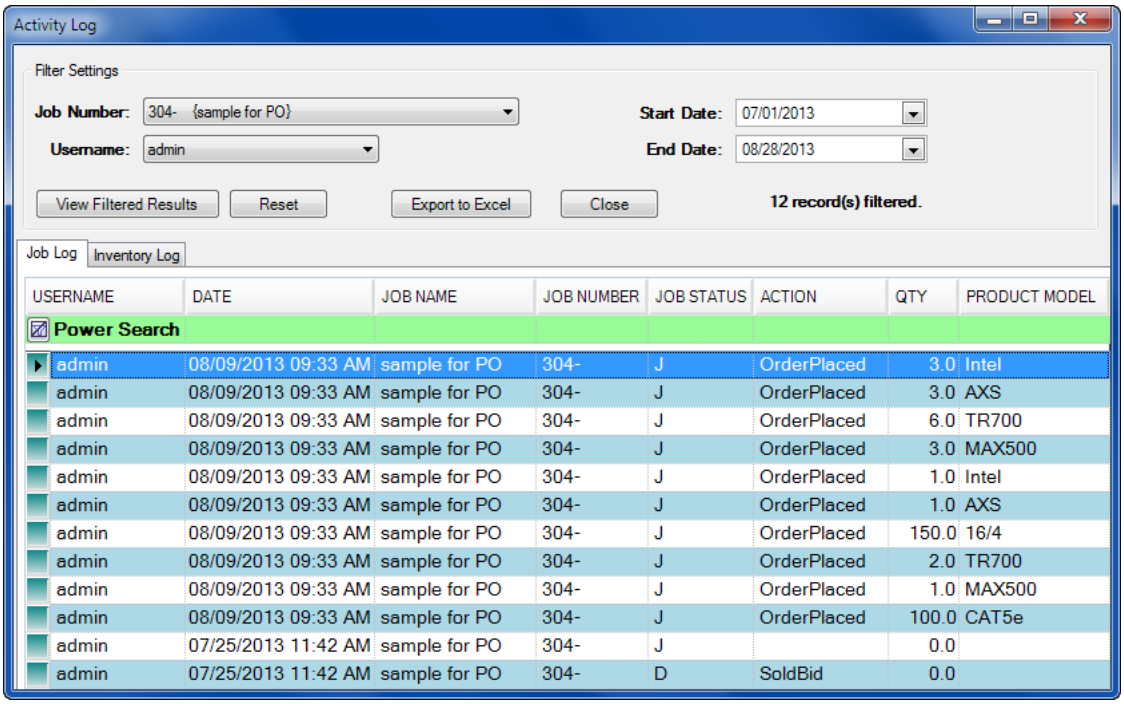
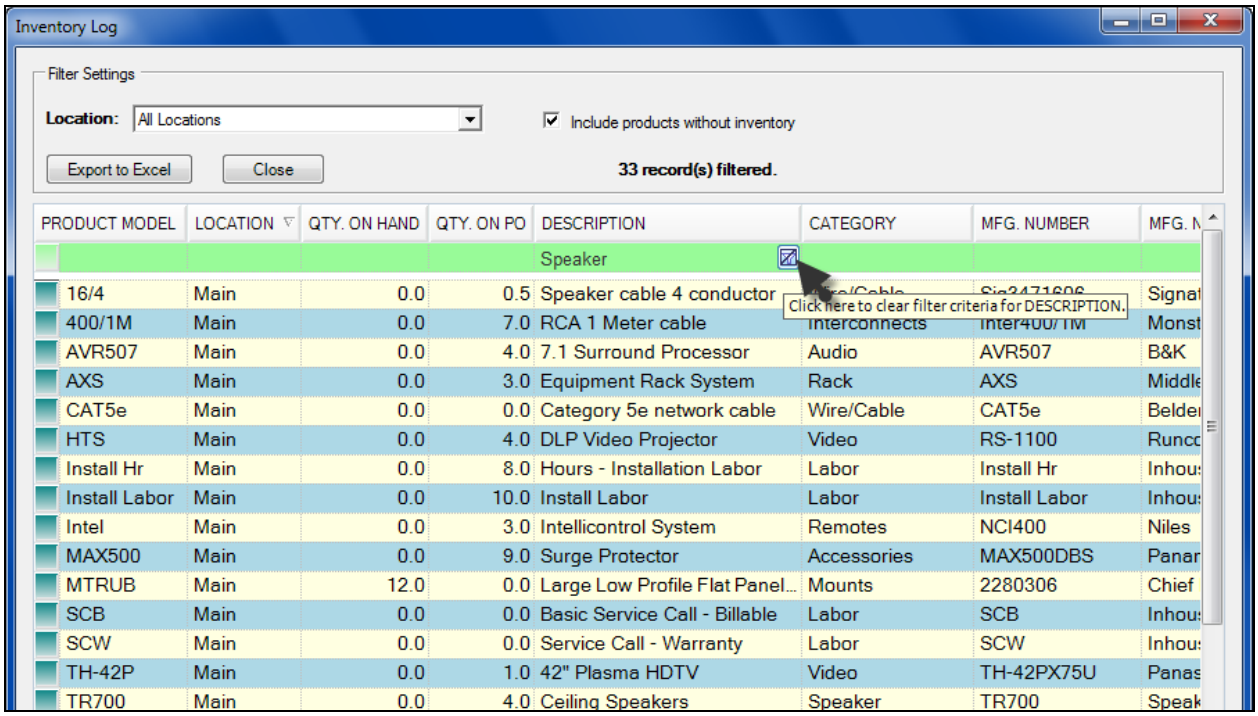


Inventory Log (Enterprise version or Inventory Active)

The Inventory Log can be monitored for a single location or for multiple locations and/or departments. This is flexible enough so that every company vehicle could be setup with inventory management. Click View/Inventory Menu to open this Inventory Screen. If multiple locations are active, select the location or department. Click on any Header to sort on that column. Enter values in any of the top green columns to filter the selection. Funnel icons appear when filters are active. This is a powerful method of searching for products and the results can be sent to Excel for further processing and to print out the search results.



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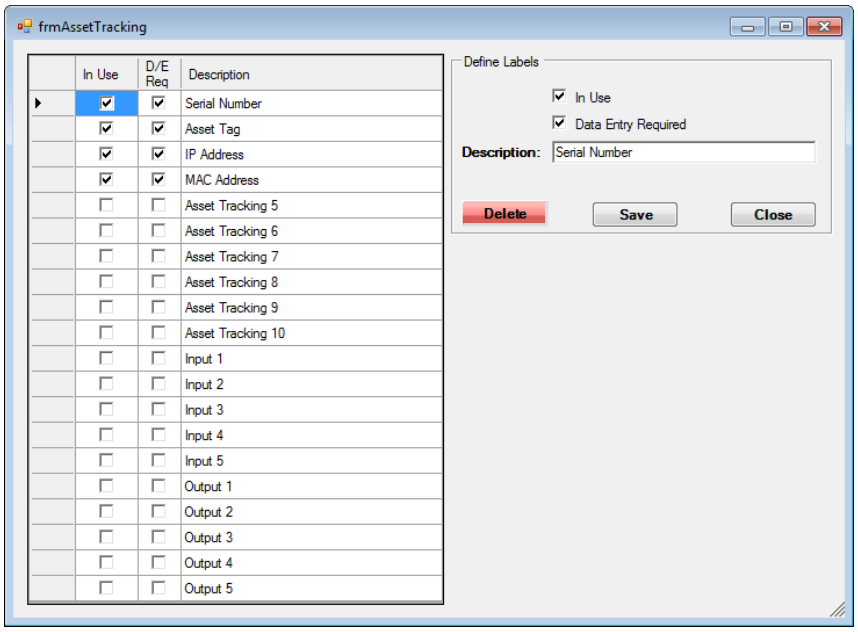
TRACKING ASSETS, INPUT/OUTPUT, WIRE NUMBERS (ENTERPRISE FEATURE)

The Enterprise version provides the ability to record and track up to 20 different parameters for each product. This flexible feature can be used to record important data like serial numbers, warranty expiration date, IP addresses, numbers, network passwords, etc. Users can setup and label the elements to record and track. Products can be setup to require data entry for each type of data. To use these features, Asset Tracking must be activated in Default Settings and must be chosen when a new Bid is created. This feature cannot be turned on or off once a Bid has been started. After adding asset tracking items to a bid, you will not be able to edit the QTY on that line item. To change QTY, delete the item and then add the product again with the new desired QTY.

Caution: Do not turn this feature on unless you are committed to the data entry process that it requires. When creating a Bid with Asset Tracking, we recommend against editing details and pricing of those line items in the Bid. This can result in problems if the same Model reoccurs more than once in a Bid with a different description or price, and then later combined in Client Bids or other reports. The practice of using a single Model number with different descriptions and pricing also causes confusion if the items are grouped when sent to QuickBooks, as it cannot properly group (recombine) the same item with different description or prices. Copy Bid Items does not work with Asset Tracking turned on.



ASSIGNING ASSET REQUIREMENTS TO PRODUCTS (ENTERPRISE FEATURE)

When you desire to track Product Asset data, turn Asset Tracking ON for the Product, then check any Assignments that require data to be entered. This can be edited within a Bid.

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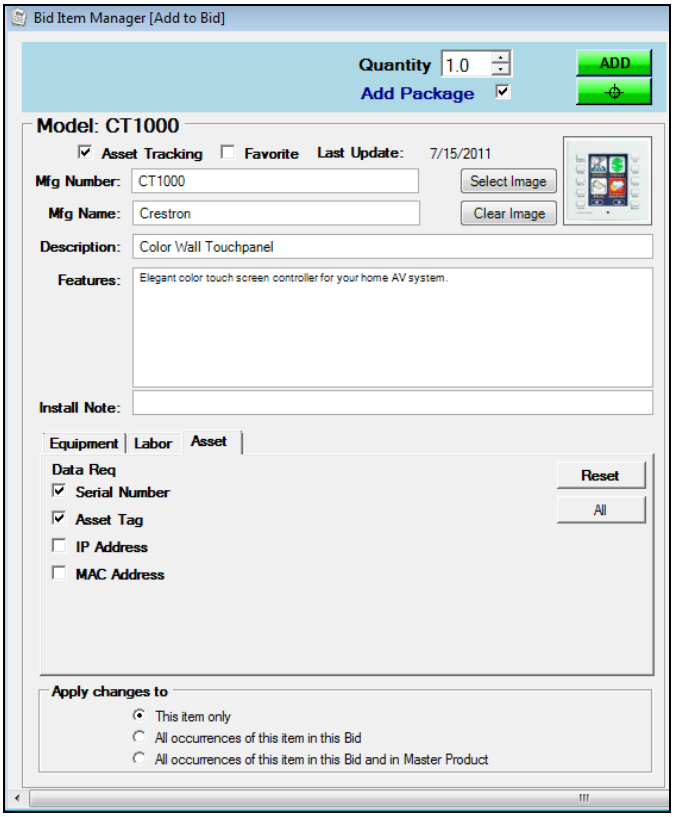
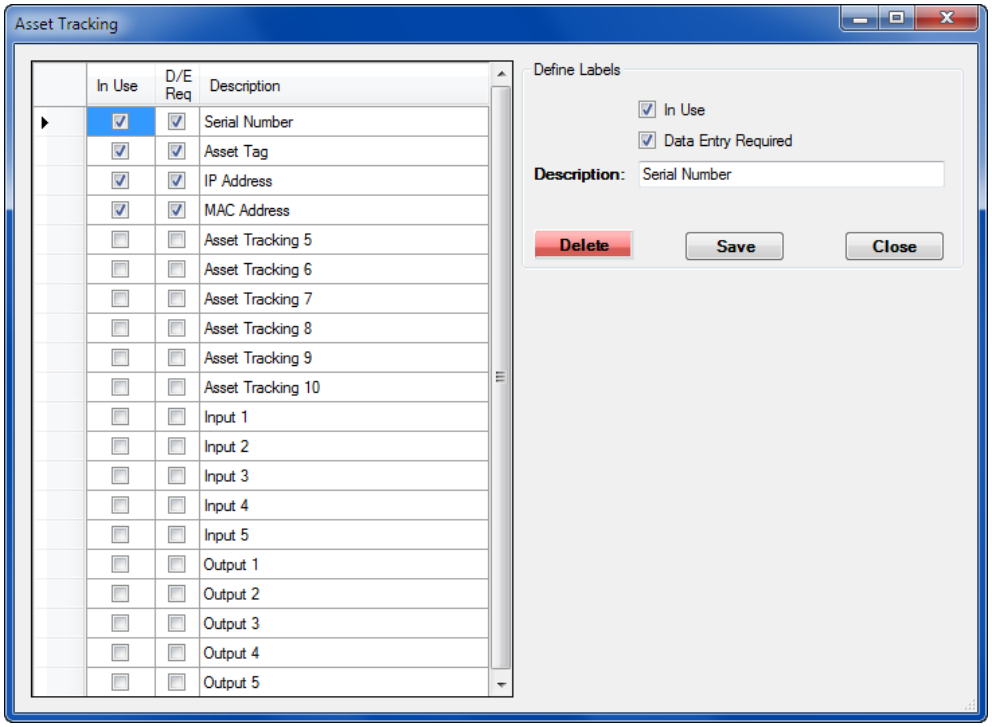


Asset Tracking (Enterprise)

This special feature provides up to 20 data fields to track each product. First setup the parameters you wish to track in your system. You can assign BidMagic to track serial numbers, IP addresses, network passwords, inputs, outputs, wire numbers or similar attributes.



Then, for each product you can determine what data needs to be entered and tracked.

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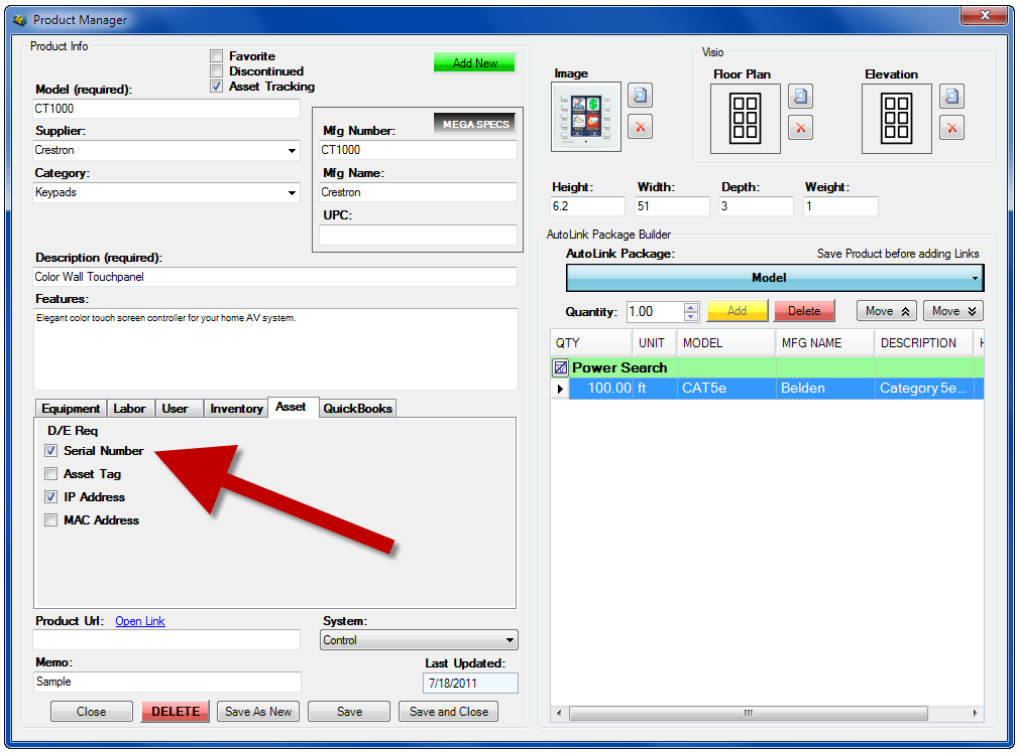
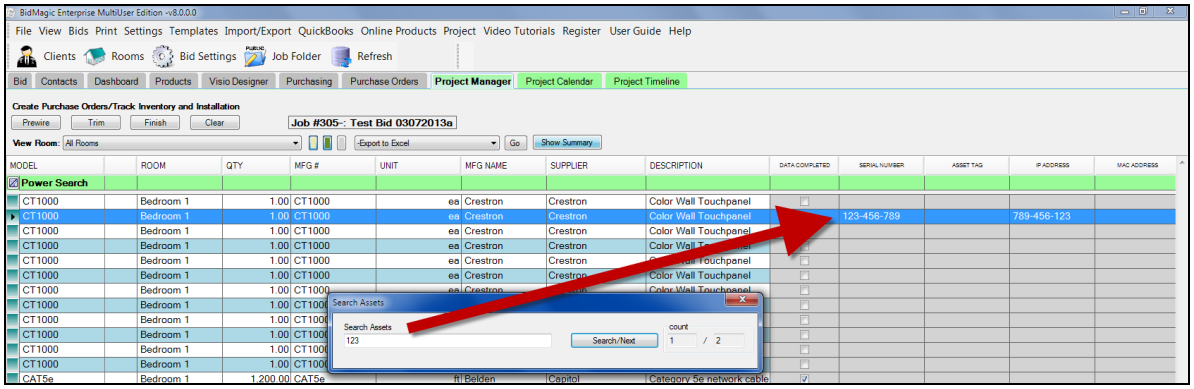


Enter Asset Tracking data on the Project Management screen. You can also import this data.

Then Hit CTL F to start a powerful search through all of the products stored your system.



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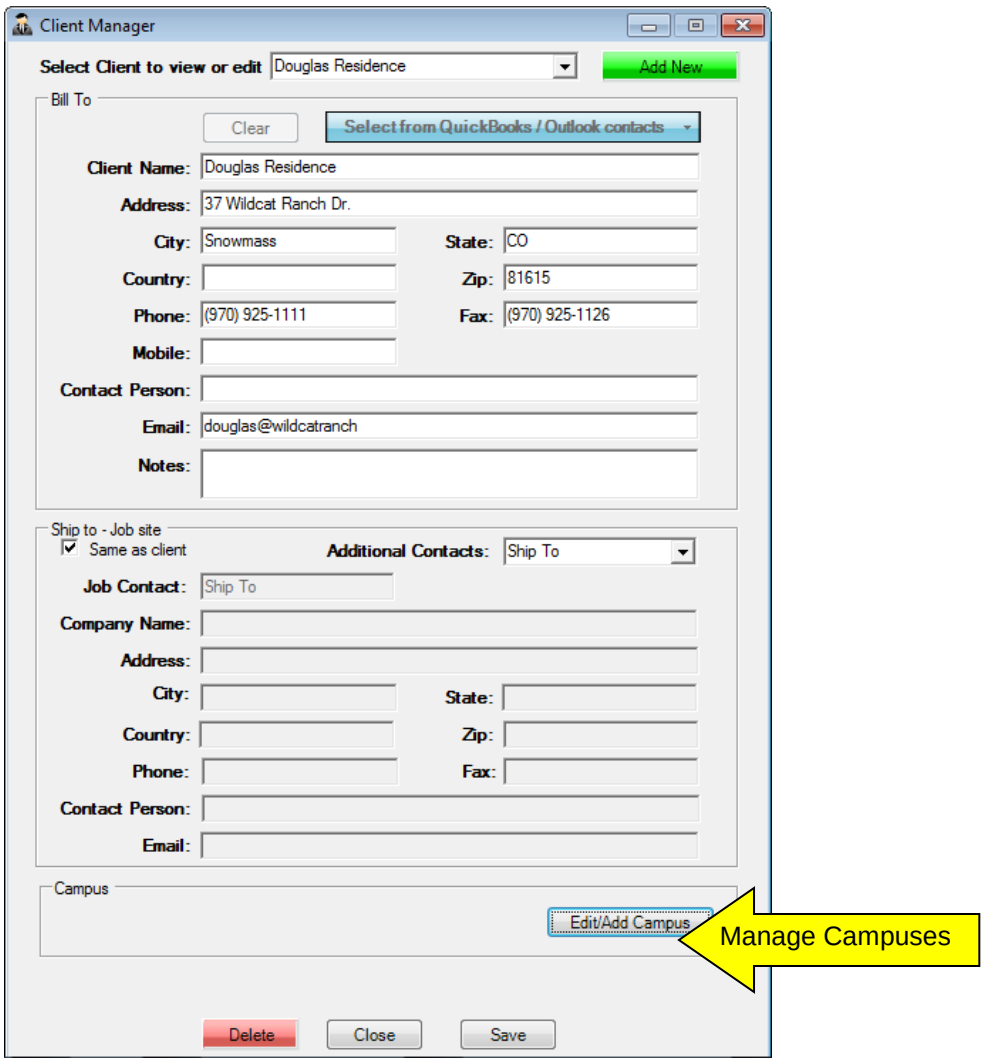
CAMPUS ROOM SELECTIONS / ROOM LISTS (ENTERPRISE FEATURE)

Large integrators can be called upon to install products in hundreds of rooms that can be located in numerous buildings within a campus. Our Enterprise Version allows users to create unique room lists for Clients and easily Import or Export a list of Rooms to assign to a specific campus.

Because these Rooms can be associated with specific Campuses, this feature creates unique locations allowing product information to be stored and tracked with Asset Tracking features, shown below. As an example, you could lookup a serial number and find an IP camera is located at the UCLA Campus, in the Arts and Science Building #1202. Then you can see the IP address for service requirements. Even if you have many other Campuses with room 1202, you can locate the Campus Room specific results.



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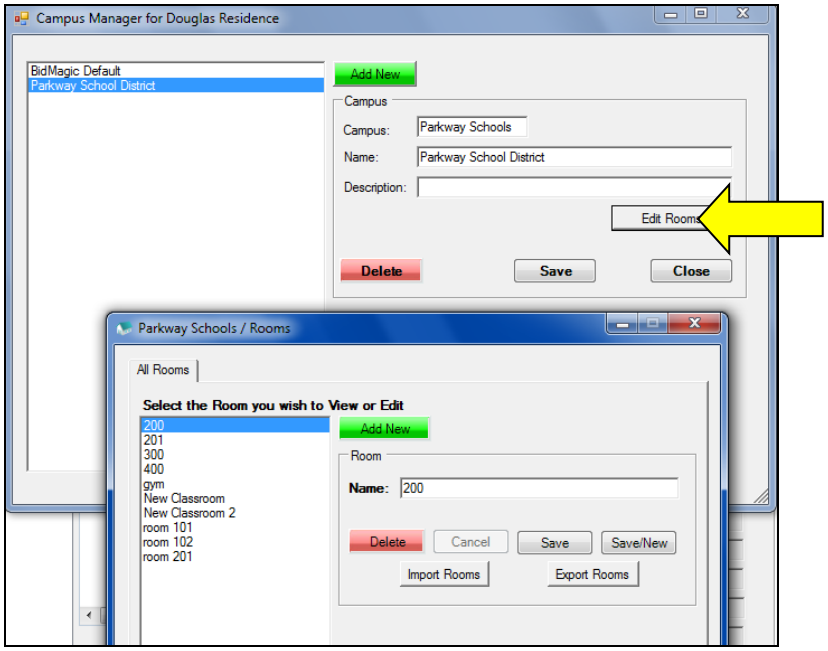
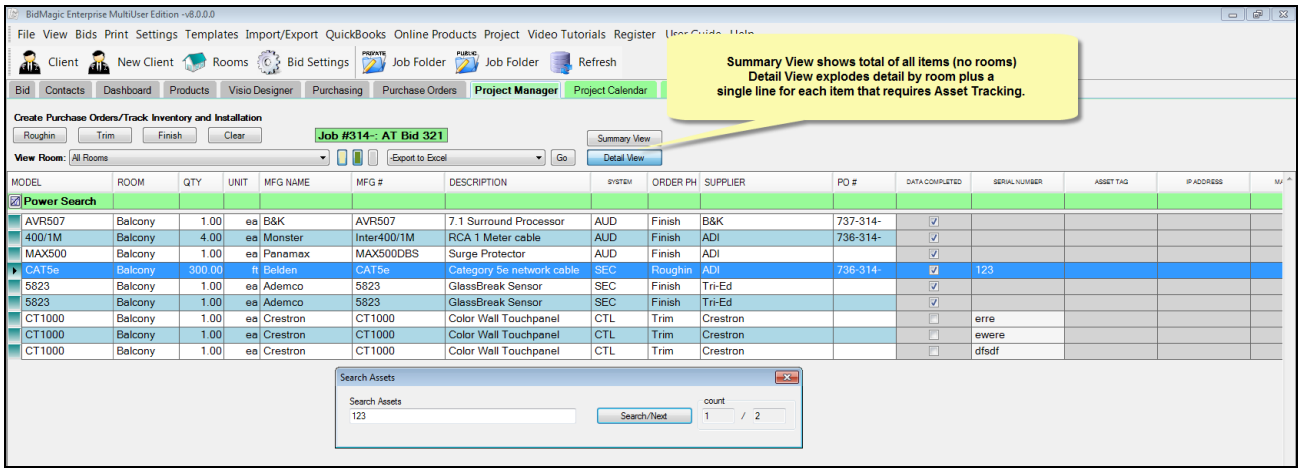


MULTIPLE BIDS CAN BE PRINTED TOGETHER AND SUMMARIZED IN A CLIENT MASTER BID (ENTERPRISE FEATURE)

This feature allows all active Bids from a single Client to be combined and summarized for output to a Client Master Bid. If you have multiple Bids for a Client, Check All Bids & Summary or Summary Only. Each Bid will be sent to Word and the Summary will be sent to Excel. Cut and Paste the elements you desire into a finished Master Proposal.

DATA ENTRY AND SEARCH ASSET MANAGEMENT (ENTERPRISE FEATURE)

When Asset Management is active, BidMagic will create a unique line for every product. So if you add QTY 6 speakers to a Bid, six unique lines will be created in the Bid Screen. The Project Manager Screen - Detail View is used to add, edit and view the Asset Management data. If the cell is white, data entry is required. If gray, data can be entered, but is not required. If dark gray, user does not have permission to enter or change this data. Hitting CTL - F (Find) on the Project Management Screen brings up a search window. This will search through all Assets in the entire system and highlight the results. You can select which columns will display in the Detail View.



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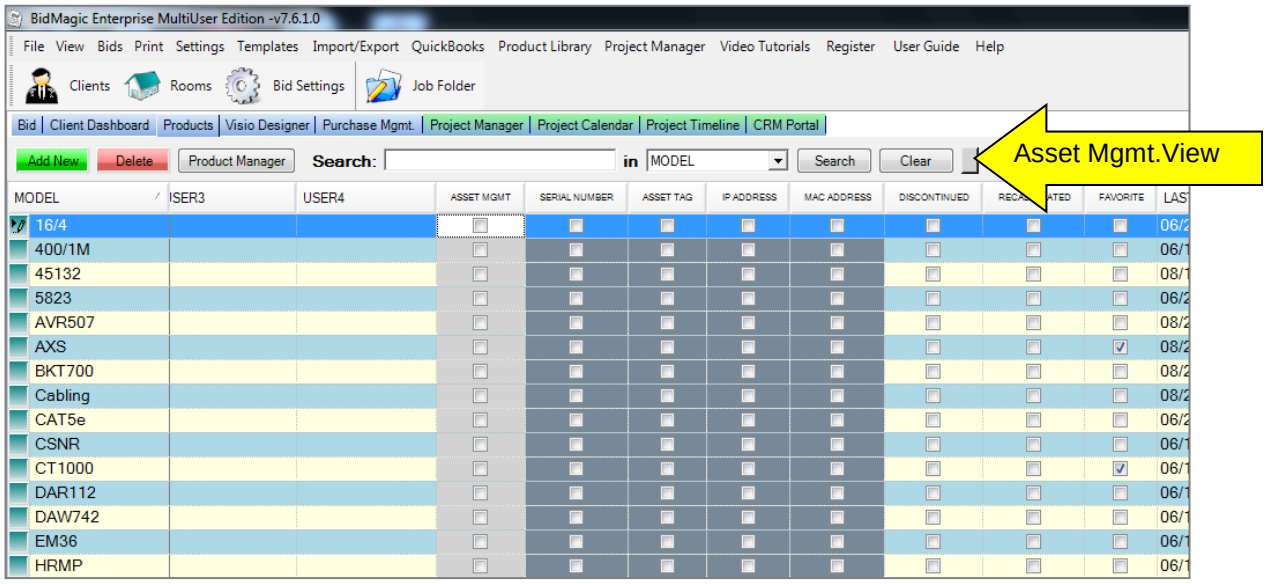
VIEWING ASSET MANAGEMENT COLUMNS IN THE PRODUCT TABLE

When Asset Management is active, the gray button toggles these columns on/off in the Product Table. This provides a quick view and allows choices to be edited from this table. Use the Detail View to explode the view to include separate lines for each product. Keep in mind that if the bid line includes a quantity like 25, the Detail view will present 25 unique lines of QTY 1 to store asset data for each product. Select the Summary View to collapse the data and see QTY 25 on a single line, which is preferable for ordering, etc.



JOB LOG - MANAGEMENT REPORTING (ENTERPRISE FEATURE)

The Enterprise version adds special features for operating in a multi-user environment. Since each user has a unique login, BidMagic can log user activities and create special management reports. Reports can be filtered by date range, Job Number or a user. Click on any header to sort ascending or descending. Type your search info into the top green row of multiple filters for the contents of any column. This makes it easy to view results, which can also be exported to excel for editing or printing. Access to these reports is permission based.

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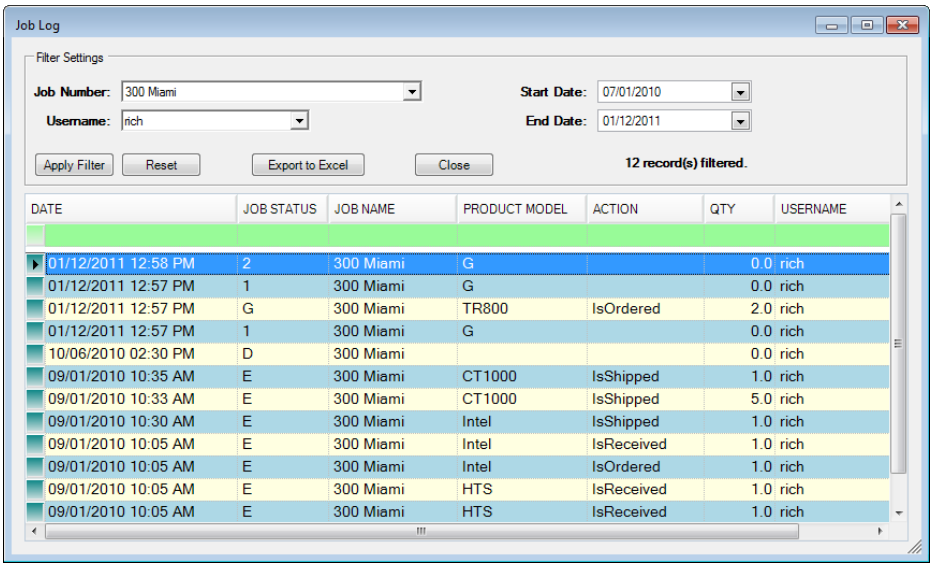

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BIDMAGIC DATABASE AND MOVING TO ANOTHER PC

As you work in BidMagic, there is no need to Save your work. All input is automatically saved in the database.
BidMagic stores all working data, including every bid, client, product, etc. in 2 SQL database files:
BidMagic.mdb
BidMagic_log.ldf

These files should be backed up in case you have a drive failure. Backups can be created by copying these files to a safe location or from the File\Backup Menu.
These files are stored in the data folder which can be found in one of the following locations:
(based on BidMagic version and Windows operating system version.)

C:\Program Files\BidMagic\Data
C:\Program Files\Microsoft SQL Server\MySQL10.SQLExpress\MSSQL\Data

Moving BidMagic to a different PC or reinstalling after hard drive replacement

Visit our Support Page for complete instructions.

Backup BidMagic Database on the original PC. File/Backup - browse to a location where you wish to save the backup.

Install BidMagic on the new or repaired PC. If needed support can supply you with a link to the latest version.

If possible, install the same version of BidMagic as you were using previously, by using original disc, running automatic updates or by contacting BidMagic (We have installer links that can be emailed to you if you tell us the version.)

Launch BidMagic on the new PC to verify installation. It will contain sample products only. Click File/Backup-Restore and restore the data from the previous PC.

If you have difficulty, contact support.

After installing, register the new installation and email us to explain that you are moving your registration to a new PC and deactivating your old registration.

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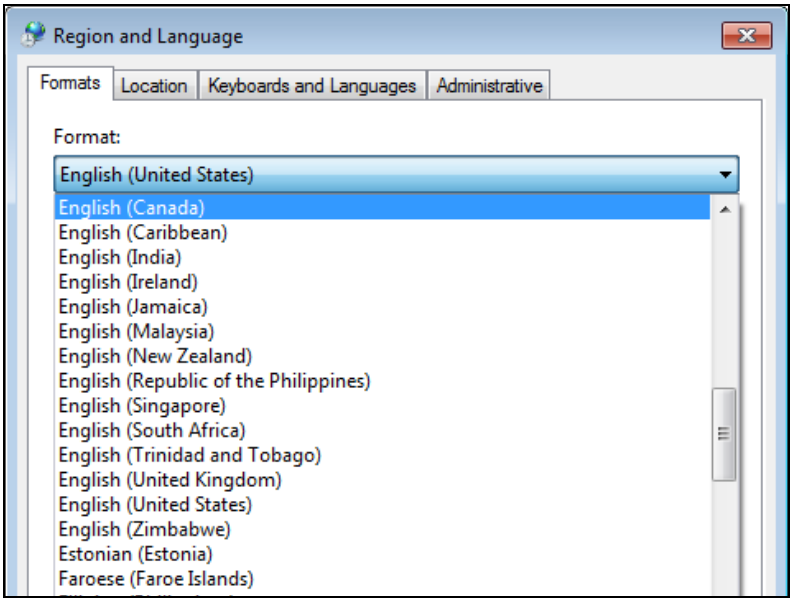
INTERNATIONAL FEATURES: SETTING YOUR PC FOR REGIONS AND LANGUAGES IN WINDOWS CONTROL PANEL

BidMagic can work with many languages, currencies and time/date formats. These changes are managed in the Windows control panel.



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TECH CALENDAR (PRO/ENTERPRISE OPTION)

Our Tech Calendar system combines Project Management, a simple Calendar interface, Gantt Timelines, mobile work orders, remote clock ins and timecards into a powerful integrated package. BidMagic (Windows application) sends Work Orders and Tasks to the Calendar where they can be assigned on a group calendar (Cloud based). The calendar is the Schedule and Dispatch Center to organize installations and service calls for field techs.
Mobile users must download the BidMagic Tech Calendar app and will need a wifi or cellular data connection. This system offers true multiuser collaboration without the need for users to add servers or other expensive infrastructure.

Note: Multiusers cannot share the Calendar system unless they share the same BidMagic database.

PROJECT MANAGER TABS (GREEN)

Calendar
Opens the Calendar View.

Timeline/Progress Monitor/Work Orders
Opens the Timeline View. Tabs include Gantt Charts, Graphs of Task Completion and graphs of hours assigned vs. actual hours used. The Progress Monitor and Work Orders Tabs are also found here.

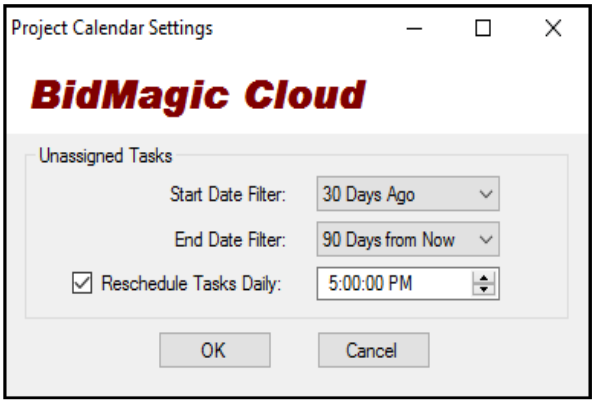
PROJECT MENU

Send BidMagic Job to Calendar
After closing a sale, mark it sold in the Bid Settings to convert the Bid to a Job. Enterprise users must also approve the Job Number. Then, BidMagic can send the required tasks for this Job directly to the Calendar system. This includes sending contact information and creating multiple tasks that have been sold. This creates unassigned tasks that can be dragged onto the Calendar for scheduling. Tasks include job documents and contact info.

Calendar
The group calendar for scheduling and dispatching of filed techs.

Timeline
The overview of scheduled tasks including Gantt charts, Progress Monitor and Work Orders.

Calendar Settings
Settings to control the Calendar view and Rescheduling Tasks.



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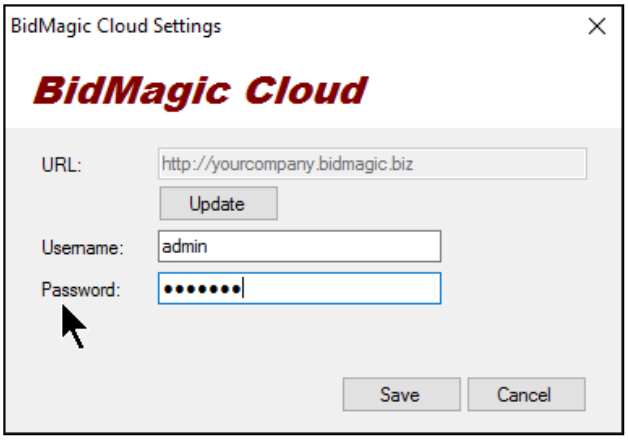
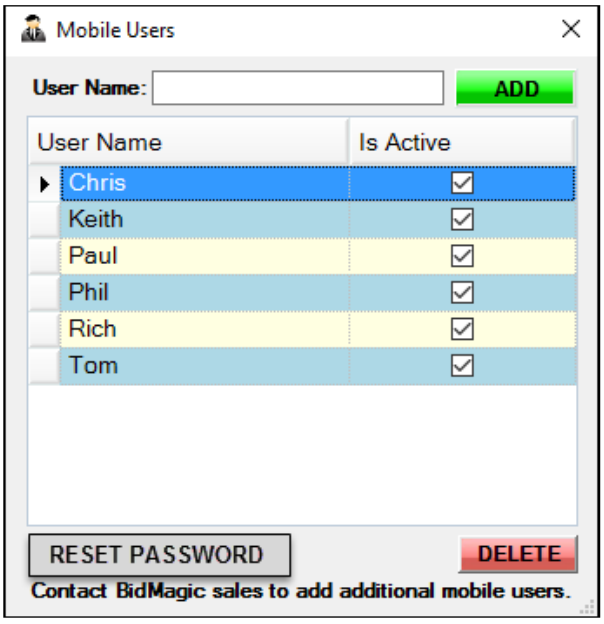
Portal Settings
Here is where your connection to the Portal is configured. The URL is automatically set for your company. Your administrator must fill in the username and password supplied by BidMagic to connect your Calendar to your mobile users. Then click Update and Save.



Mobile Users
This form manages the mobile techs who appear on the Calendar to connect to mobile devices. Add or change user names as needed up to the number of tech calendar subscriptions you have. (Make sure Active is checked for your current users.) Administrators can reset the password to the current password in Default Settings. (default is BidMagic – case sensitive).

Mobile devices require a wifi or cellular data connection to the app. Contact BidMagic if you need to add additional mobile users.
Note: BidMagic's admin user can adjust these settings, but will not appear here or on the Calendar.



Reload Data from Calendar
Loads data to the Calendar and Timeline. This updates all new information added. While this updates automatically, this allows a user to instantly refresh this data.

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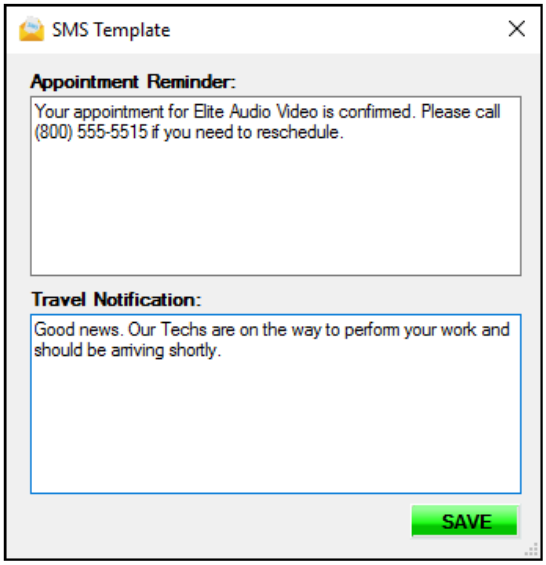
Activity
This is where you manage your own activities for timesheets, like lunch, shop, meeting, training, etc. Click directly on the Timesheet to add an activity.

Timesheet
This is where you can view user time sheets including Work Orders, Service Tickets and QuickTasks. You can also create new entries for other activities. Timesheets can be exported to Excel or QuickBooks (QuickBooks desktop interface required).

Text Notifications
The text message contents are controlled in this form. If text messages are enabled (see below), a travel notification will send a text to the client when a tech has begun travel to their location. (When a tech clocks in to travel for that job.)



How to Send Text Messages to Clients
BidMagic can send text notifications to cell phones to remind your clients of a scheduled appointment Fill in the text you wish to include. The appointment reminder will automatically contain the date and time of the appointment. Alerts will be sent if Send Text Alerts is checked and if a mobile phone number is entered in the box. The checkbox will default to checked for service calls and QuickTasks and unchecked for work orders.

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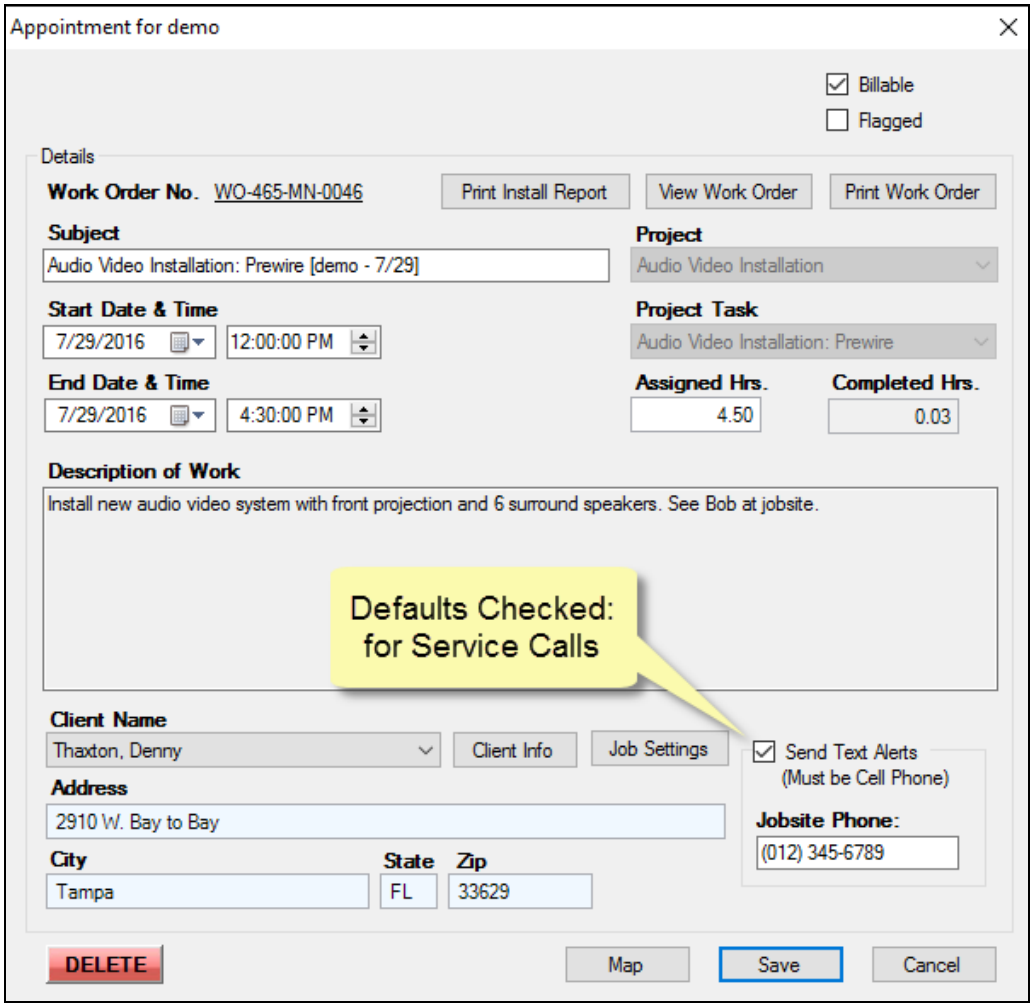
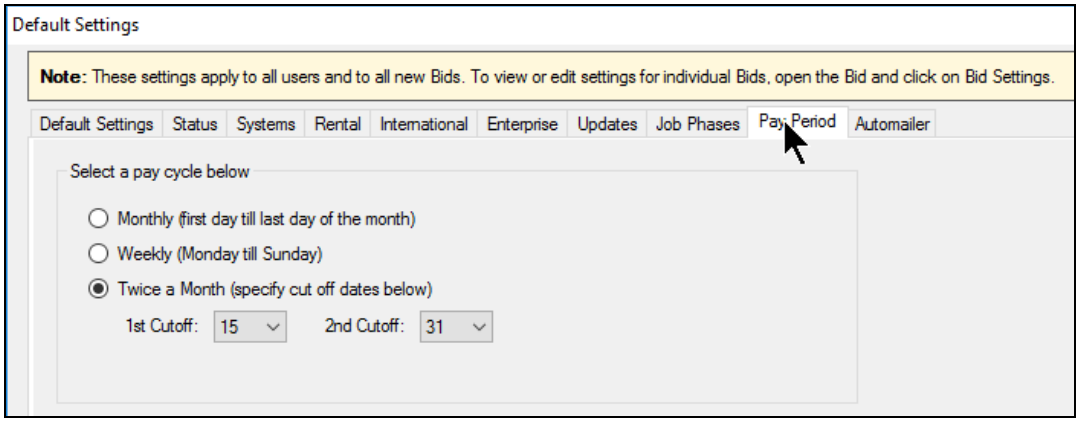


Disable Calendar

The Calendar is a cloud service that requires an internet connection. Without an internet connection, BidMagic will try to interact with the Calendar cloud services. If this slows or disrupts your workflow while writing bids or doing other operations, this choice turns these Calendar features off. When you reestablish an internet connection, don't forget to turn the Calendar features back on.

Pay Period (Calendar Feature in Default Settings)

Our Calendar system is designed to schedule and track Installation and Service calls. Use this screen to define your company's pay periods. This is used to create Timesheets for payroll and billing.



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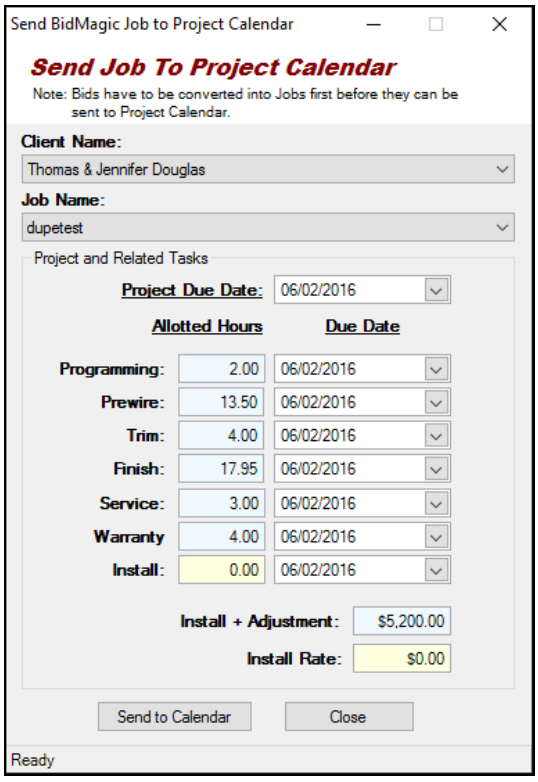
SENDING JOBS TO THE CALENDAR FOR SCHEDULING

Once a Bid is marked sold and the Job Number is approved, it becomes a Job. This enables product ordering and sending to the Calendar. Open the Bid (Job) and click on the Project Manager menu, then Click Send BidMagic Job to the Calendar. You can set or edit due dates for Tasks to help prioritize them for your planning. The Task Hours counter displays the hours. Set the Due Date for each Labor Phase. Installation is a flat rate amount including any adjustments. When sending installation to the Calendar, enter your billing rate so that BidMagic can automatically calculate the number of hours you would like to assign. You can manually adjust the Install hours required if needed.



If this project has already been sent to the Calendar, you will have the option to update the project or overwrite it. If work has already been completed on a project, you should update it to retain the record of work completed.

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TECH CALENDAR - SCHEDULE & DISPATCH CENTER

BidMagic sends Projects and Tasks to the Calendar where they can be dropped directly onto the calendar of the field tech assigned to the task. Each Project contains information about the tasks included and time allotted. This makes it easy to assign the needed hours for each project. Calendar entries can be moved or resized to update project requirements.

Clicking on a Calendar entry opens the details including job address, contact information, jobsite maps and project work orders and other documents. You can mark appointments as billable, completed, etc. View or Print daily, weekly or monthly Calendars. Dispatchers will love working with this great interface. Select a user from the dropdown box (Select User Icon) to view their Calendar. Users are displayed in alphabetical order. Navigate to the date you choose with the small Calendar in the upper left hand corner. Select the Calendar view you desire (day, week, month, etc.) You can print or export to Outlook.

For the best experience, we recommend hi speed (10 MB per second or faster) internet connections for office use and 3G or Wifi connection speeds for remote users.

CALENDAR CONTROL ICONS

Print Schedule

Select a user in the Day View or Work week view Work Order to print their current work order(s) with Job contact info, address and Work Order details. Select Day view to Print the full day, select Work week view to Print all work orders for the entire Work week.

Today

View Today's Calendar(s).

Day, Workweek, Week, Month Calendar Views

Opens the Calendar to the Specified view. Day view is best for viewing and assigning multiple users. Workweek view is best for assigning multiple days to a single user. The Print Schedule Icon creates a consolidated Report of all Work Orders shown in the Day or Week View.

Find User

Select user Calendar to be viewed. These are displayed in alphabetical order.

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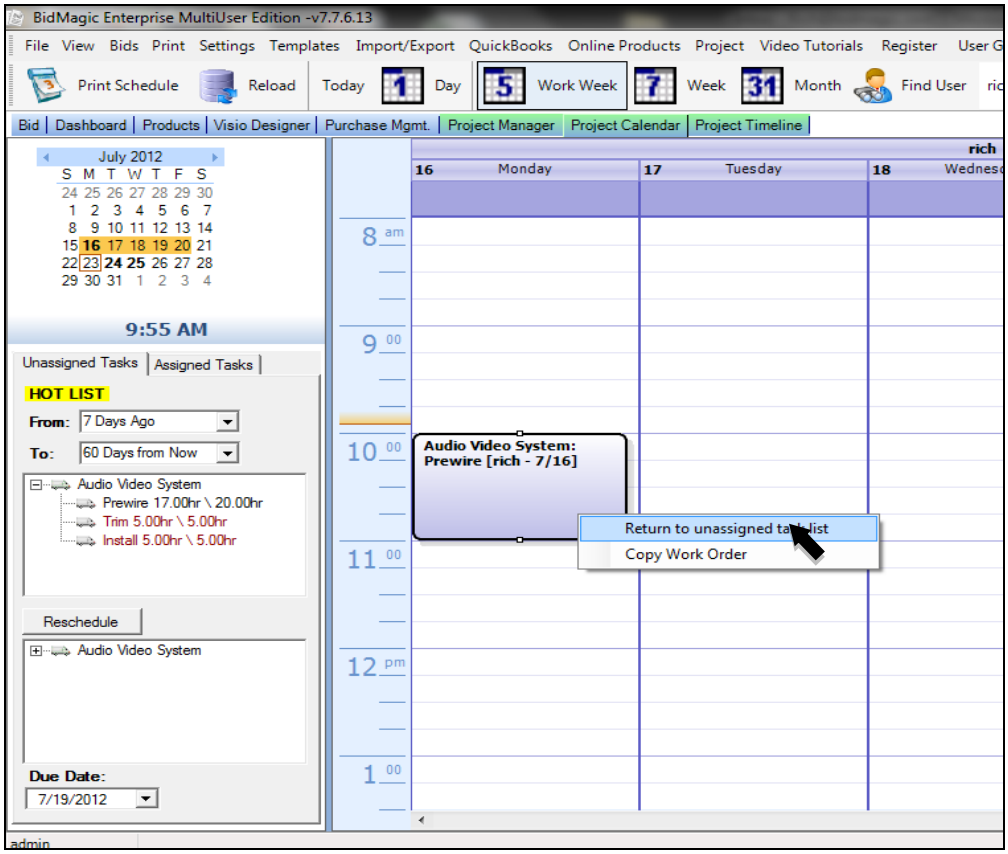

SCHEDULING HOURS SOLD & CREATING WORK ORDERS

BidMagic Projects appear in the HOT LIST in the Unassigned Task window. Filter the time range for Tasks you wish to Assign. The example above shows Unassigned Tasks from 7 Days ago to 60 days from now. Click on the + sign to open the tasks within a Project. Selecting a task displays the number of hours sold and the number of hours waiting to be assigned. You can set or edit due dates for Tasks to help prioritize them for your planning. Unassigned Tasks appear in red text if not scheduled by their due date. The Task Hours counter displays the hours that currently need to be assigned. Once all hours and tasks have been assigned or completed the task will disappear from this list and move to the Assigned Task List. If all tasks are marked complete, the task will move to the Assigned Task list regardless of how many hours have been scheduled. Set the hours you wish to assign to a user for each work order. When you add a work order or event to the Calendar, it may take up to 15 minutes to appear on mobile devices.

COPY, PASTE, MOVE, RETURN TO UNASSIGNED TASK LIST

Click on a Calendar task on the Calendar to select it, then right Click to Move it, Copy it (To assign to multiple days or techs) or return the Task to the Unassigned Task List or to delete the task. If you attempt to delete a task or return it to the unassigned task list after tasks have been marked completed, you will be prompted to approve the action. Caution: Deleting a task from the Unassigned Task List removes all scheduled events and cannot be undone.

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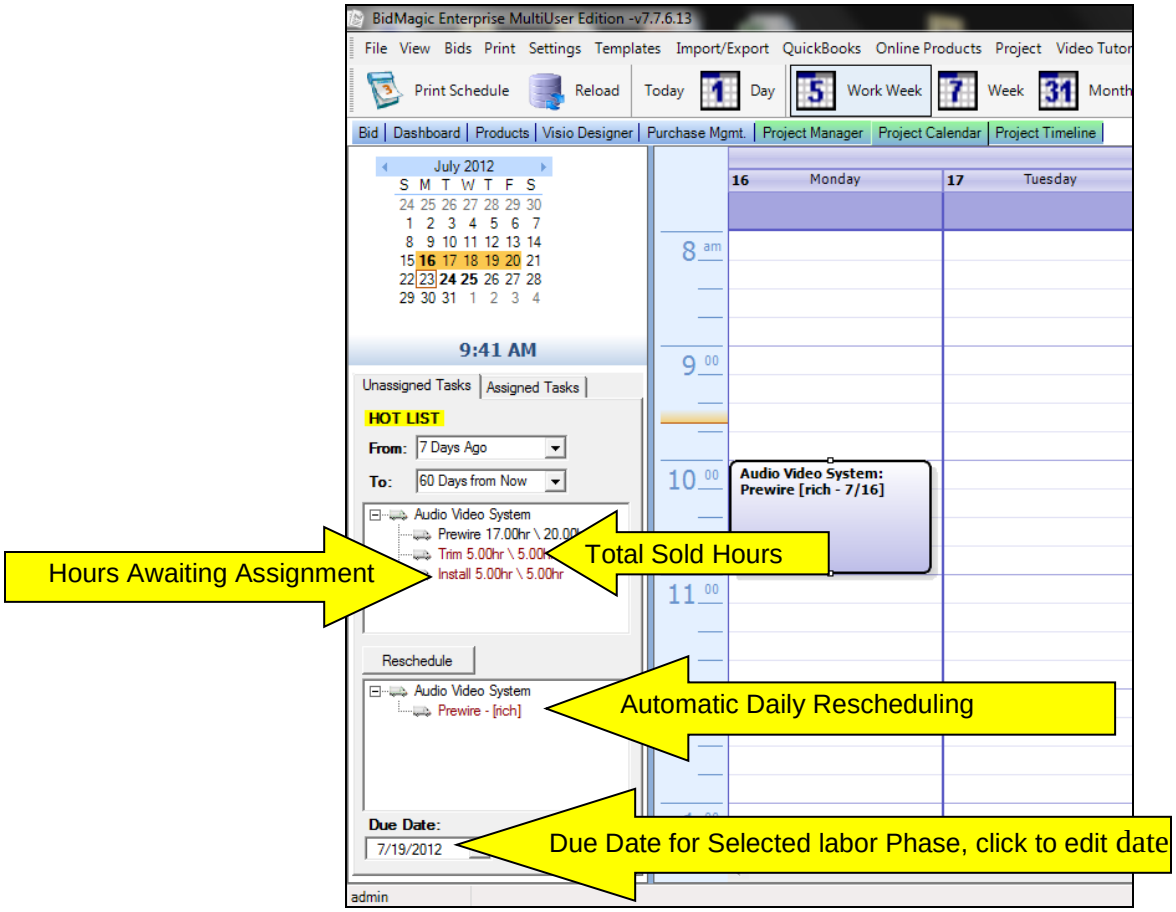

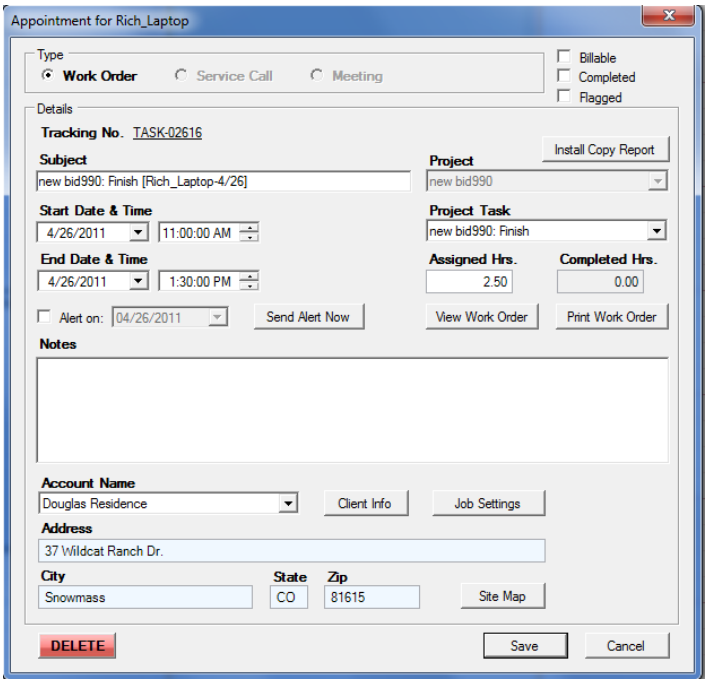

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WORK ORDER & SERVICE TICKET ASSIGNMENTS

Dragging a Labor Phase to the Calendar opens the Send Work Order Screen. This displays the Client Name, Job Name and a detailed list of Tasks with the hours required for each item in this labor Phase. This screen is designed to allow the dispatcher to assign specific Items for this Work Order when desired. Mobile users will see the specific items assigned or have the option to view all items requiring labor for the selected labor phase. Items that have already been assigned or completed are displayed here. They are shown as unchecked if needing assignment, clock face if scheduled and checked if completed. Items sent will appear in Work Order details for mobile installers. Installers can check each item when completed. BidMagic tracks the progress and completion of each Product. You can select individual items to send or select All, then Send to Work Order. To schedule multiple installers to the same job, you can resend the same items to multiple users or Copy/Paste them as described below. Mobile users can check completed items, on their own behalf or for their team.

Once on the Calendar, drag the top and bottom to further adjust the start and end times as needed. Each time your assign a task a unique Work Order will be created and the Task Hours will be reduced and show the hours that remain to be assigned. If this creates a schedule conflict, you will be prompted to resolve the conflict.

Each Work Order contains the contact information, address, notes and a link to the Installation documents and Jobsite Map. These can be marked Completed or Flagged for follow up. When all task items have been assigned to users, a task will no longer appear in the Unassigned Task Window. Note: Hours remaining to be assigned will display as 0 if all hours have been assigned, but not all tasks.

Tips for Assigning Labor to Work Orders and Service Tickets:
BidMagic's Calendar system creates very specific work orders, sorted by labor phases for each project. This empowers users with flexible control, based on how labor is assigned to products in the bid. For the most control, assign labor to every product that requires it, broken down by labor phases. This will provide the most detailed work orders. For less control, consider adding a single labor line item to each room in the job. Work orders created with this method will break down labor requirements for each room as opposed to each product. For super simple work orders, simply assign a single line item of labor that contains all labor for the entire bid. This method creates work orders that can be tracked, but do not contain product by product or room by room details of all equipment and labor that is scheduled. However, if the install team has the installation copy in hand, the complete details are shown there.

Suggestion for Tracking Labor Tasks in the Calendar:
For efficient tracking of installation task hours in the Calendar, we suggest assigning a *single* labor item per room for Prewire and Trim hours. This makes it easy for installers to track a single task per room for wire pulling and termination. Then assign specific labor to every product for *only* the single equipment phase when the product is ordered, submitted and installed. With this method, installers can check each specific piece of gear complete when the equipment is installed. For example: Family Room – 2 hours prewire labor, .5 hours trim labor. TV – 1 hour finish labor. You may want to *hide* the single room labor items, so they appear only in room totals and project totals.

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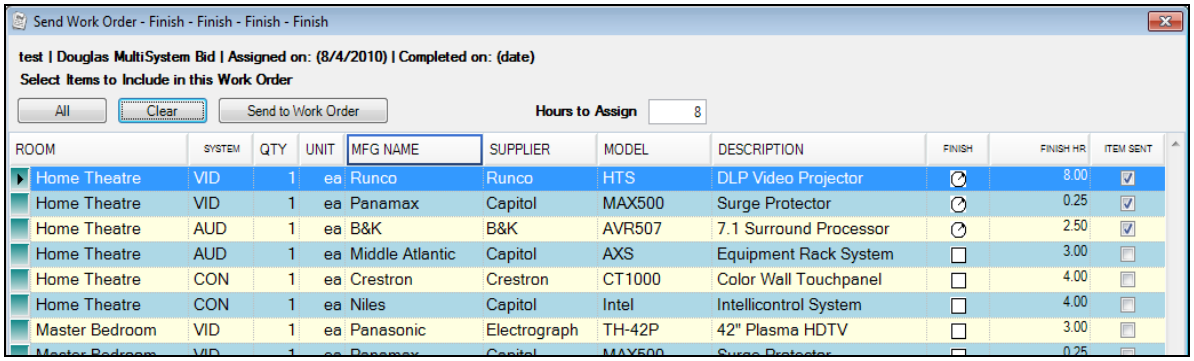
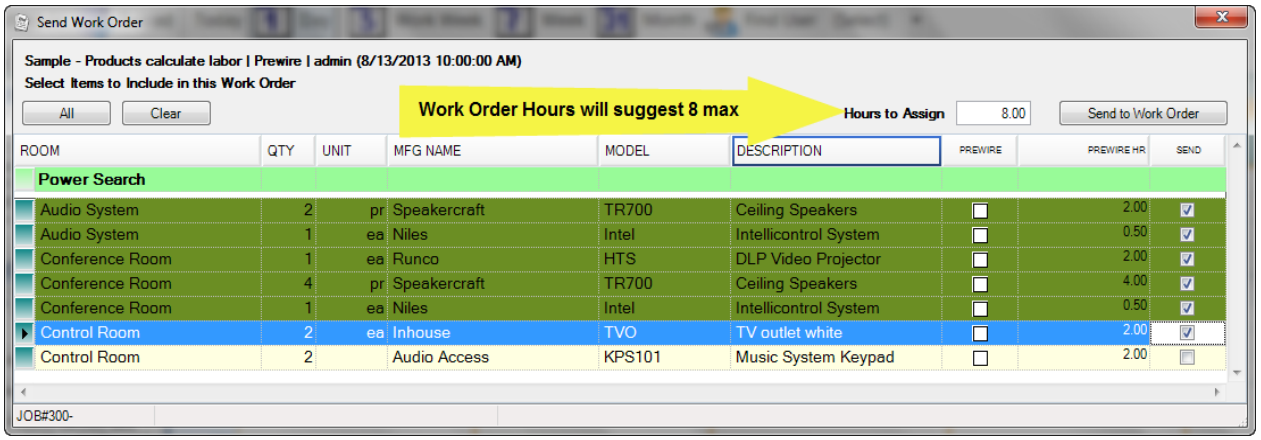


Assigning a Multi-Day task to a User

No matter how many task hours you select to include in a work order, keep in mind that each work order on the calendar should start and stop in a single calendar day. You have the option to pick a select group of tasks or select all tasks (click All Button) Let's say you selected 100 hours, which a single tech could not complete in a day. The Hours to Assign window will help you deploy daily chunks and will automatically cap at 8 hours. You can overwrite the 8 with any hours you wish. This will create an 8 hour event on the Calendar for that day and reduce the labor burden of this job by 8 hours.



For multi-day tasks, click on the Calendar event and drag a copy a of this work order to additional days or techs and copy the work order. This creates new work orders and depletes the hours from remaining task hours. You can assign many hours to a work order. Repeat the process until all hours have been assigned to all users and the remaining Task hours = 0. When all hours and all tasks have been assigned this moves the task to the Assigned Task List. If all tasks are marked complete, the task moves to the Assigned Task list without regard to hours assigned.

Assigning One Task to Multiple Users or Multiple Days

Select the number of hours you wish to assign and drag the task onto the Calendar of the first user. Then select the number or hours you wish to assign to the second user and drag the task onto the Calendar. You can keep assigning until all unassigned hours reaches '0'. You can also send duplicate Work orders to multiple users. To schedule a single Work order for multiple days, open the week or month view and copy the Calendar Event to additional dates and or users. Copy/Pasting Work Orders is the preferred workflow, as dragging a Work Order to another user or date only works on the current calendar screen. Copy/Pasting is the preferred method to create multiple assignments as it provides a much more flexible method to navigate on the Calendar to any date or user you wish to assign.

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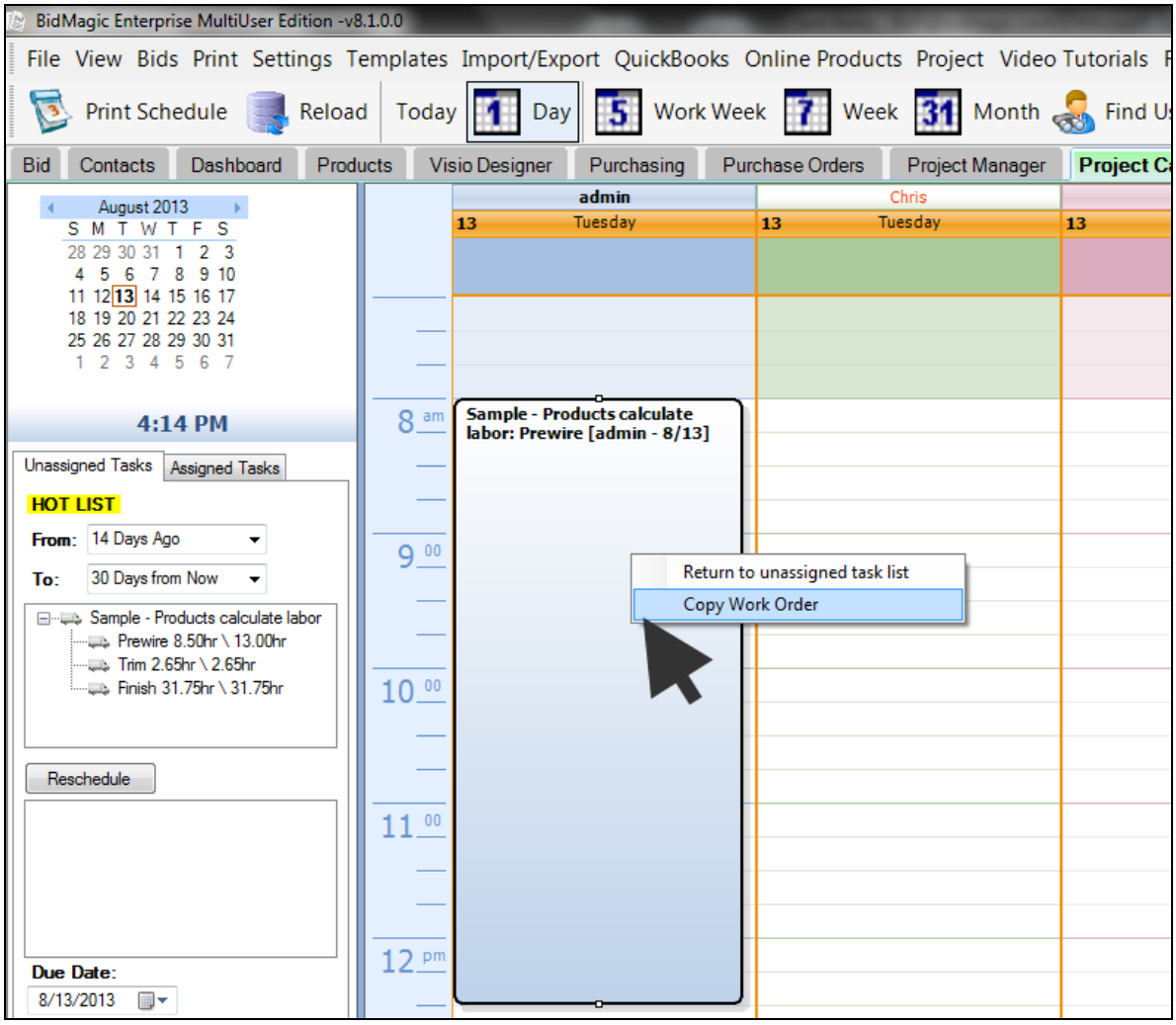
USING COPY/PASTE FOR MULTIDAY OR MULTIUSER ASSIGNMENTS

Every time you send a Work Order to the Calendar, BidMagic stores that in the clipboard. To duplicate that same Work Order for another day or user, simply right click on the Calendar and select Copy.



When copy/pasting Work Orders, consider this example. Let's say you had 40 hours of prewire labor to assign and you do not need to be selective about the items in the Work Orders. Drag the task to the first user on the Calendar. Then click Select All. Even though you are sending 40 hours for the whole Work Order, BidMagic fills in 8 hours for the selected day. (You can overwrite the suggested hours). Then click Send to Work Order. This assigns all tasks to the first user and schedules a typical 8 hour day. Note in the unassigned Task list that even though you have now assigned all the tasks, there are still 32 hours of work needing to be assigned. Copy the Work Order to another user or date and see this action deducts another 8 hours from the remaining hours. (Now 24 remaining hours show) Continue copying the Work Order until this value reaches 0. Once all tasks and all hours have been assigned, the task will disappear from this Unassigned Task area and can then be viewed in the Assigned Task area.

The Calendar shows Techs who have clocked in.

Once a tech has clocked in to a Calendar event, it will be highlighted in bright green. This makes it easy to see if your techs are on time or if there is a problem right on the Calendar screen. This screen does not indicate when a tech has clocked out.

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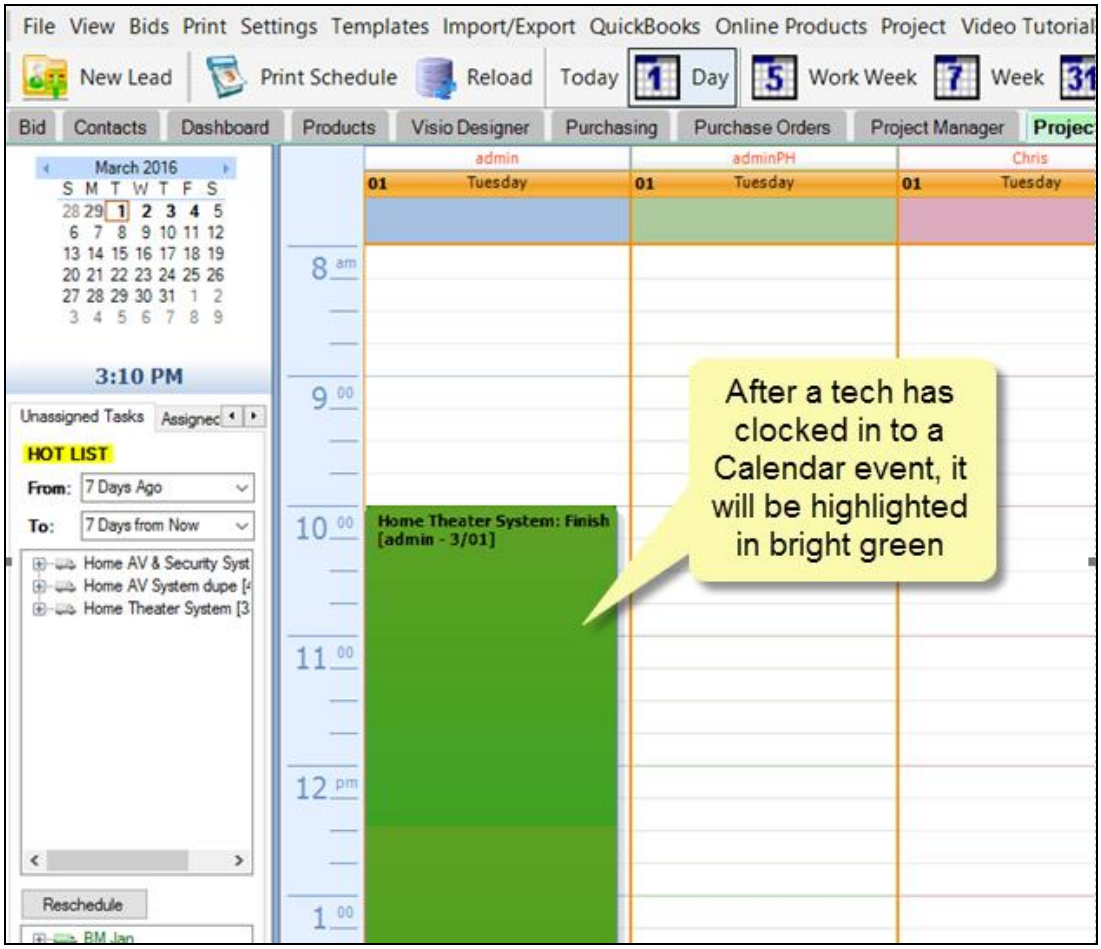

Moving, Changing or Copying a Calendar Event

It is easy to make changes to an existing event on the Calendar. You may select it resize the event or move it to a different day or user. Dragging the event to another time or user allows you to move or copy the event. Click on the event to change or delete it. Right Click on a task to cut, copy to another user or time. This menu also allows you to return a work order to the Unassigned Task List. This returns the task for reassignment and updates the remaining hours that need to be assigned. Choose a user's workweek view or month view calendar view to easily copy or move their assignments from day to day. The calendar month view allows moving the date, but does not choose exact times. Assigning additional users or days is easier if you select a Calendar event, then right click on it to cut or copy to another time or user. Hours assigned in this way will be deducted from remaining task hours in the normal manner. For example, each time you copy/paste an 8 hour assignment to an additional user, 8 more hours will be deducted from hours that must be assigned.

Assigning More or Less Hours than Estimated (Sold)

Because many jobs will finish under or over the estimated hours, you can easily deal with that. You can mark a Work Order as complete and then delete any remaining hours that were previously assigned. Marking complete or deleting an assignment will provide the option to delete all future calendar assignments for this user or cancel all related assignments for all users.

Once tasks are fully assigned, they no longer appear in the Unassigned Task List (tab). These tasks will be found in the Assigned Task List (Tab). This allows users to view Assigned Tasks and add additional hours as needed to complete the task.

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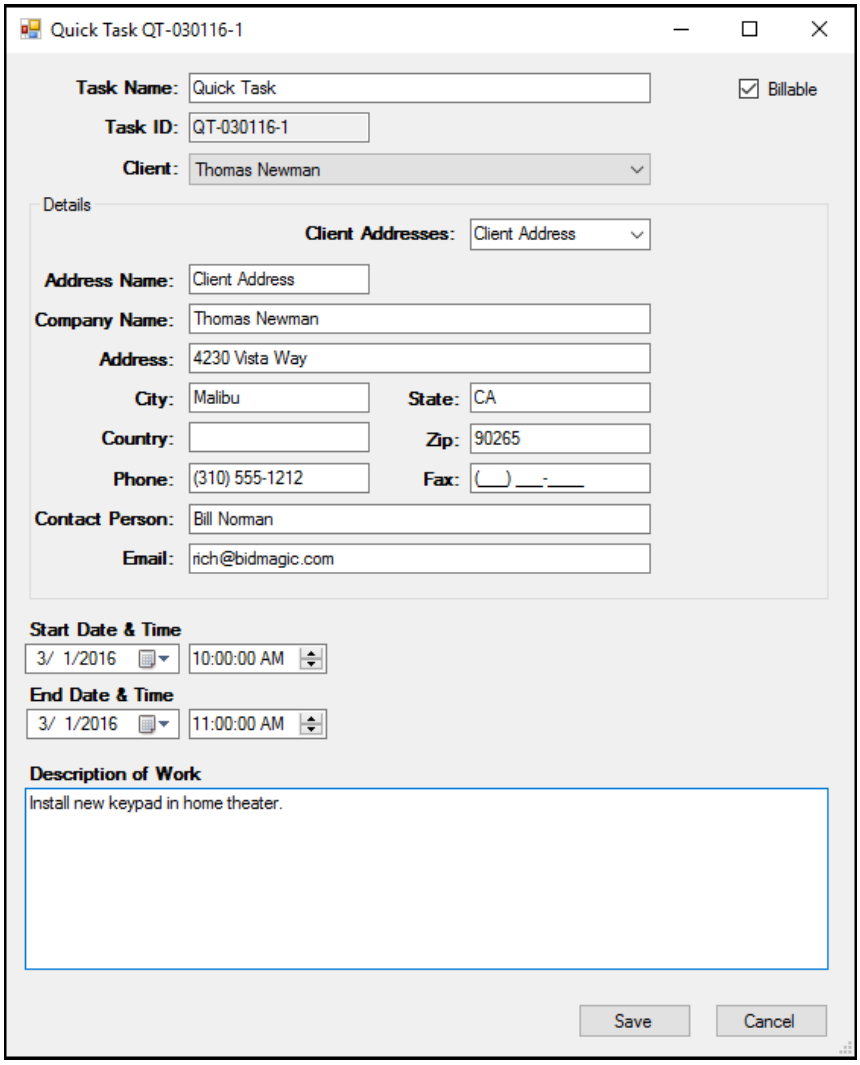

Create a QuickTask Directly on the Calendar

Double click directly on the Calendar to create a new QuickTask. This handy new feature makes it super easy schedule meetings, appointments, shop time, days off, etc. You must enter a Description of Work. This does not require creation of a bid or service ticket first. QuickTasks are sent to mobile techs who can clock in and out of the task and mark it complete. This also appears in Time Cards, but does not have a relationship with any bid or service ticket.

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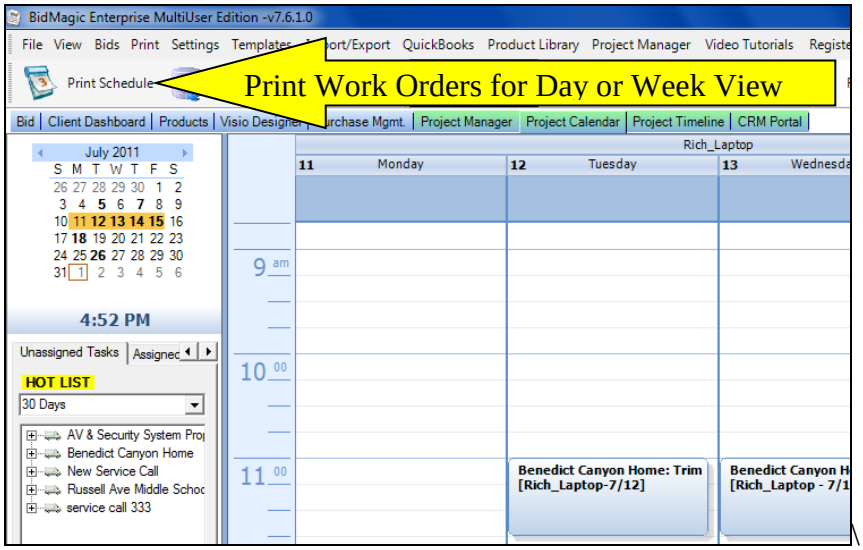
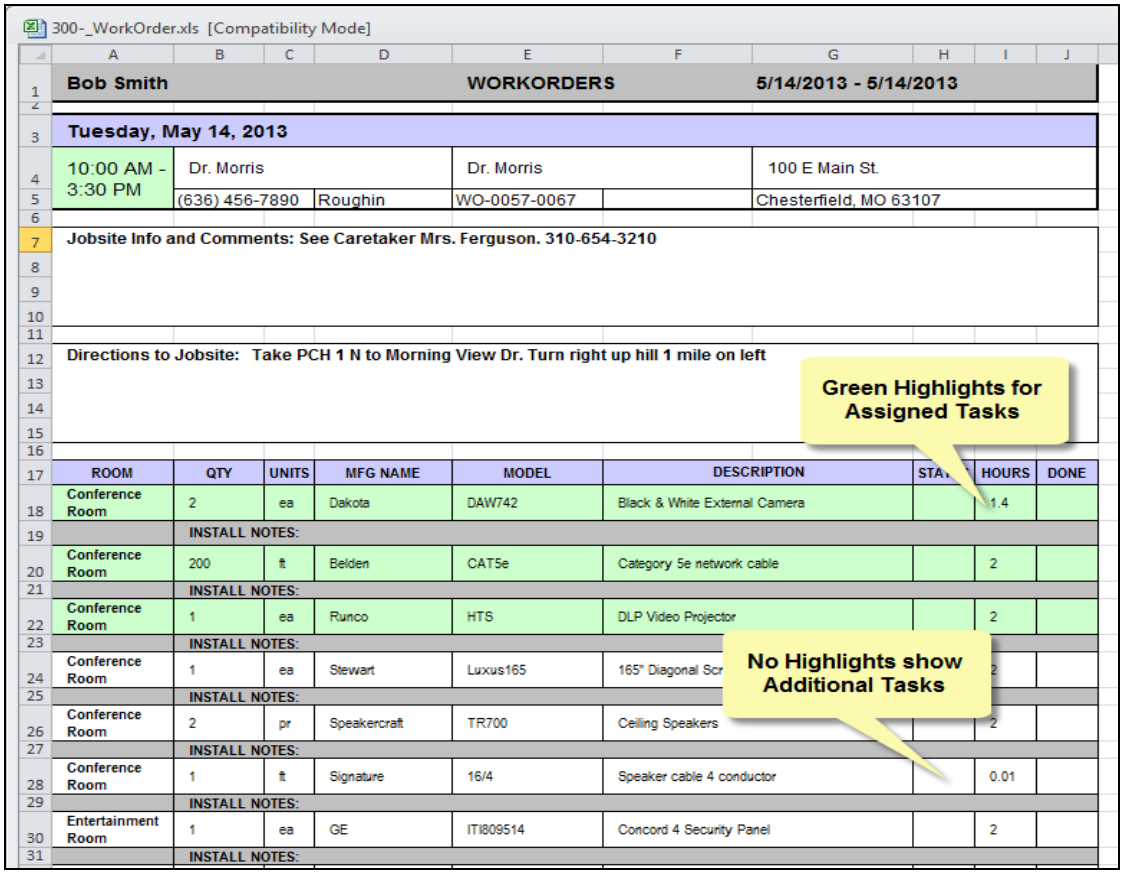


View and Print Work Orders and Schedules

Calendar users can view or print single work orders or a Schedule of work orders for a complete week. Click on a calendar event then click View Work Order to open it on the screen as shown below. Single Work Orders can also be printed from the appointment or select a Calendar user and Day or Week view then click on the Print Schedule Icon to create a detailed excel report for the selected user's day or week. (Based on the selected Calendar View.)



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AUTOMATIC RESCHEDULING

The Calendar can collect incomplete tasks on work orders for rescheduling. This powerful feature searches all work orders in the Calendar.

Tasks will be sent to the Rescheduler under the following conditions:
A. The task is scheduled but not marked complete in a work order that has ended.
B. The task is not scheduled again in the future for any Calendar user.

The Rescheduler can be set to run automatically at a predetermined time in the Calendar Settings form below. Users can also click on the Reschedule Button in the Calendar to run the Rescheduler immediately. Tasks sent to the Rescheduler do not display required hours as the exact remaining hours may vary.

There may be an instance when you wish to place a Task on the Calendar for a previous date or time. This will immediately place an entry into the Rescheduler. However, you can click on the Calendar event and then open the work order to mark Tasks as complete, which removes them from the Rescheduler.

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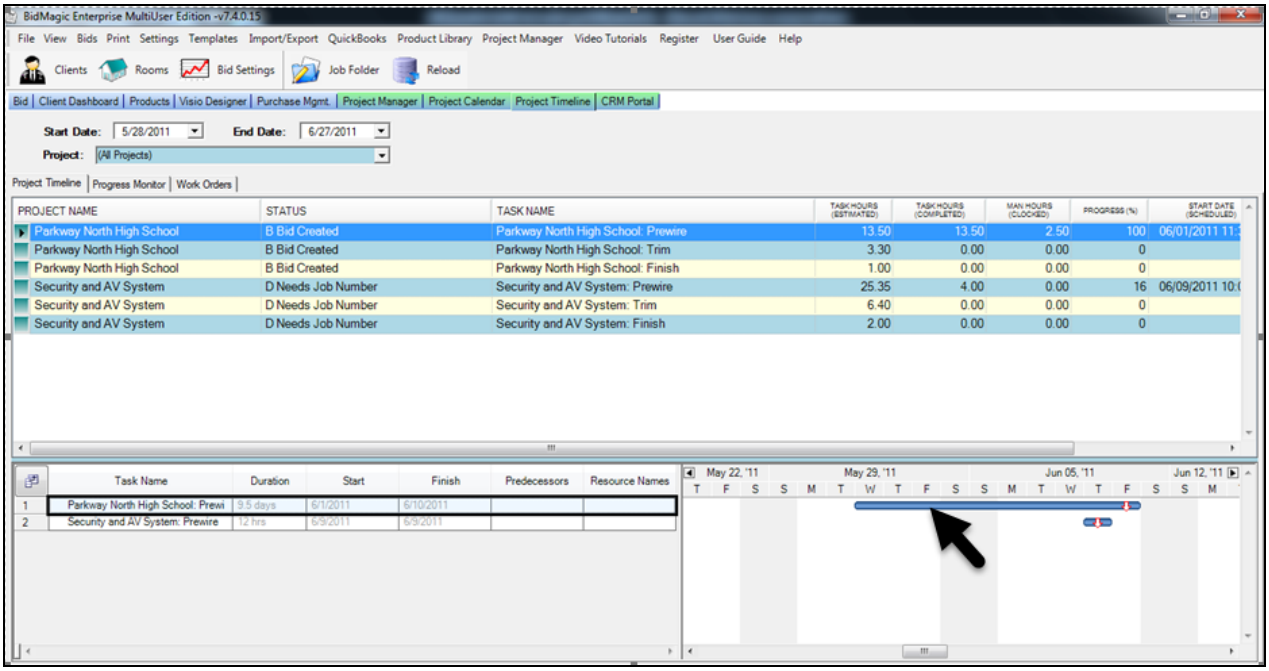
TIMELINE (SCHEDULE OVERVIEW)

This Gantt Timeline View makes it easy to view the big picture of your project scheduling. The bars here indicate the scheduled task duration. Hover over a bar to view how the project is scheduled. Select the Start and End Dates to display a time frame. Select the Project Task or All Projects that you wish to view in the Project dropdown box or click on a bar graph to select a Project Task. Refer to the Project Manager Screen, Progress Monitor and Work Order screens to see actual completed results.

Select a single project to show it on the Timeline or select all Projects and a date range to view. Inactive Projects will only show on the Timeline if you check the box to show inactive. Double click or right click on the duration bar to navigate to the starting event on the Calendar. Click next to navigate to the next event.



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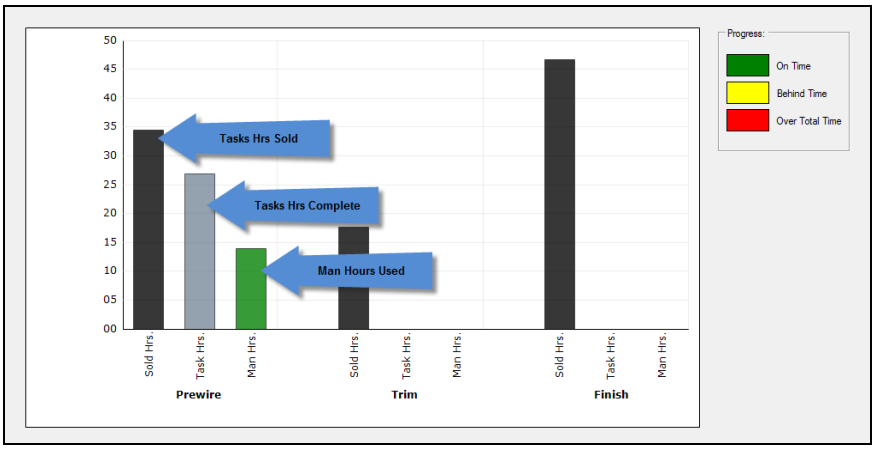
PROGRESS MONITOR (COMPARES HOURS SOLD, COMPLETED AND MAN HOURS)

BidMagic keeps track of Total Hours Sold, Completed Hours (Sold Hours per Item Task) and Completed Man Hours (from User Clock In and Out). Select a Project in the Project dropdown box to view the graph. These show the actual view progress and compare sold hours vs actual hours that have been completed. The clocked hours columns provide visual feedback of progress. If this column is green, completed hours were finished on or ahead of Hours Sold. Yellow indicates completed work has taken longer than Hours Sold. Red indicates that completed hours exceed all Hours Sold for this labor Phase. In other words, Green means job is running ok, Yellow means job running over hours to date, Red means this labor phase ran over total hours sold. Example: Sold 34 hours, Completed 26 task hours of in just 14 hours. Green bar for Clocked hours indicates currently ahead of expected progress for this labor Phase.



Right click on a chart if you wish to save a copy that can be printed or sent to others. This gives direct feedback to directly compare task hours sold with actual clocked hours completed.

WORK ORDER SCREEN TRACKS COMPLETED BY JOB AND TECH

The Timeline/Work Order Tab shows a comprehensive view of all assigned Work Orders and can be sorted for easy access to important information. This can be used for checking progress and approving hours for payroll or billing. Total hours are displayed for the filtered selection. This could be for a job, a tech, or a combination of both.

Administrators can right click on any column to open a Work Order or right click on Time In or Time Out columns to enter hours for field techs. Employees with a Tech Calendar subscription can enter clock ins and outs directly from their smartphones. Normal checkmark indicates item completed by that user. Checkboxes with gray background indicate this item was completed but on another work order, or by a different user. Right clicking on this box allows the status to revert back. This is helpful in the rare case where a completed item needs to be reset.

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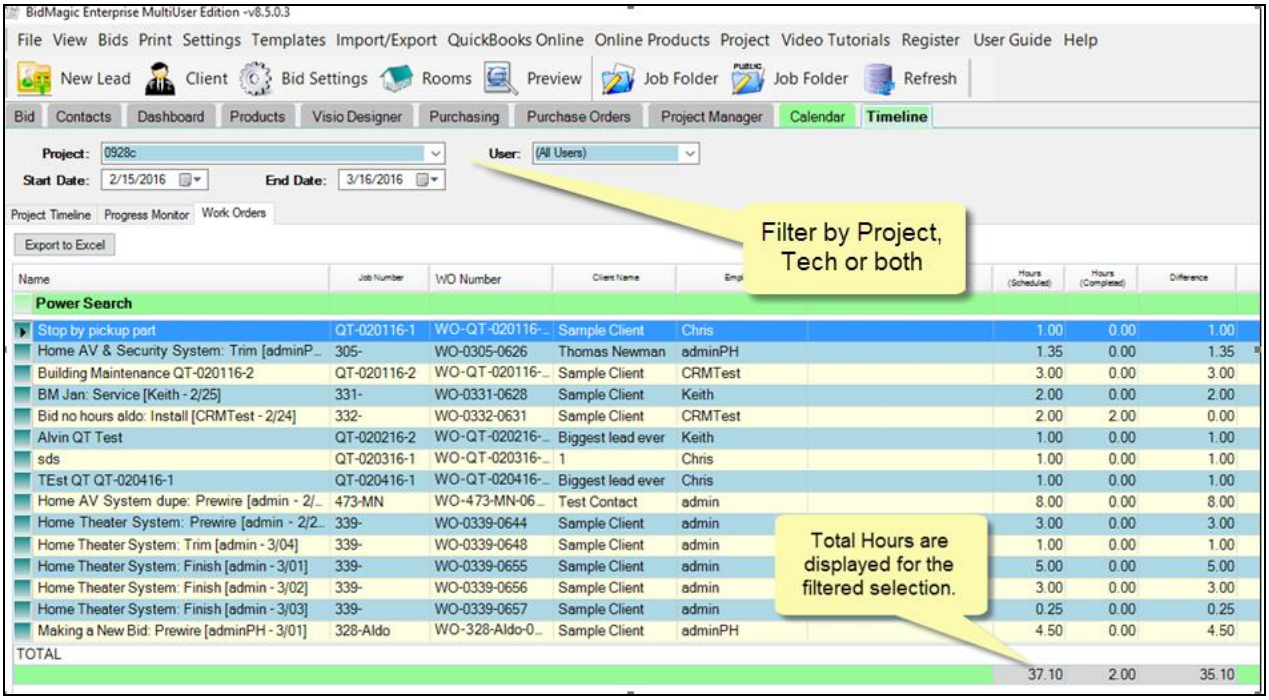
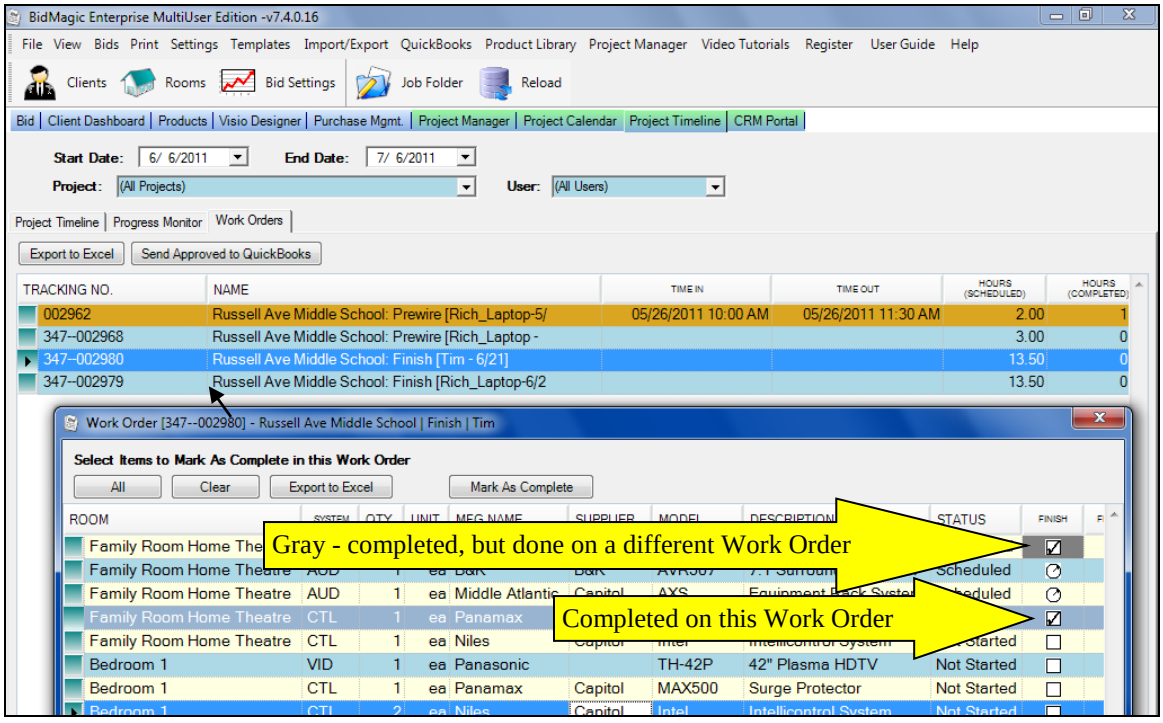


This screen is perfect to track all work orders and shows completed results. Click on any header to sort by Tracking number, Project Task Name, Completion, Flagged, Billable, etc. Right Click on a Work Order to bring up an additional Navigation Menu. BidMagic users can track and edit progress on this global view. This screen can be exported to Excel (with active filter results) for printing or distribution to others.



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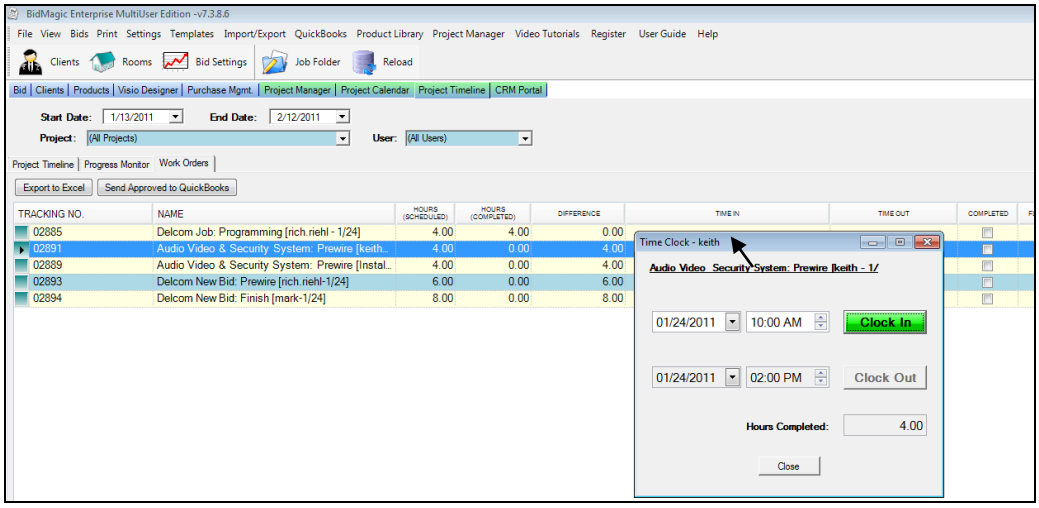
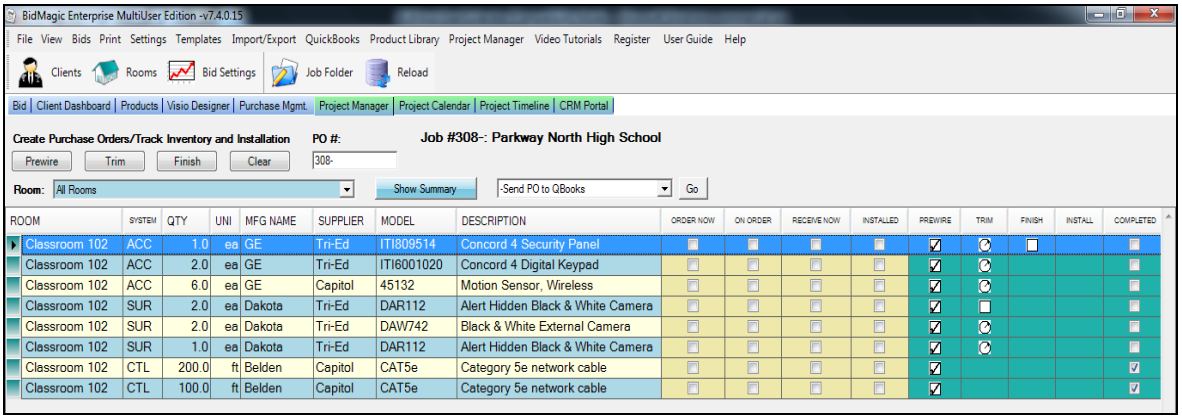


PROJECT MANAGER (TRACKS COMBINED RESULTS FROM ALL TECHS)

Activating the optional Tech Calendar adds additional features to the Project Management screen. Additional columns appear to track the progress for completion of each labor phase. No box means no labor has been sold for that product in that labor phase. An unchecked box indicates labor is required for that product. A clock icon indicates the work is now scheduled on the calendar. A checked box indicates that the item labor has been completed. When all labor phases for a product are marked complete, the completed box will also be checked.



TRACKING COMPLETED HOURS IN PROFIT REPORTS

Connected techs can Clock In and Out of the Jobs, their reported hours are also sent to the Profit Report. This report utilizes this current information as to the hours logged to update the actual labor calculations and compare them to the labor cost and sell prices. Calendar users can compare hours sold vs actual hours used there.

TIMESHEETS

BidMagic collects all hours into employee Timesheets if they are set up as users in the Calendar. These can be viewed or exported to Excel for editing, printing, or for importing into payroll or accounting systems. Right click on the WO Number to navigate to that work order. Right click on the hours for any date or entry to edit Work Order data or to add or delete additional Activities like lunch, travel time, shop time, etc. WO indicates a work order or service ticket created by BidMagic and contains the job number within it. QT indicates a QuickTask created directly on the BidMagic

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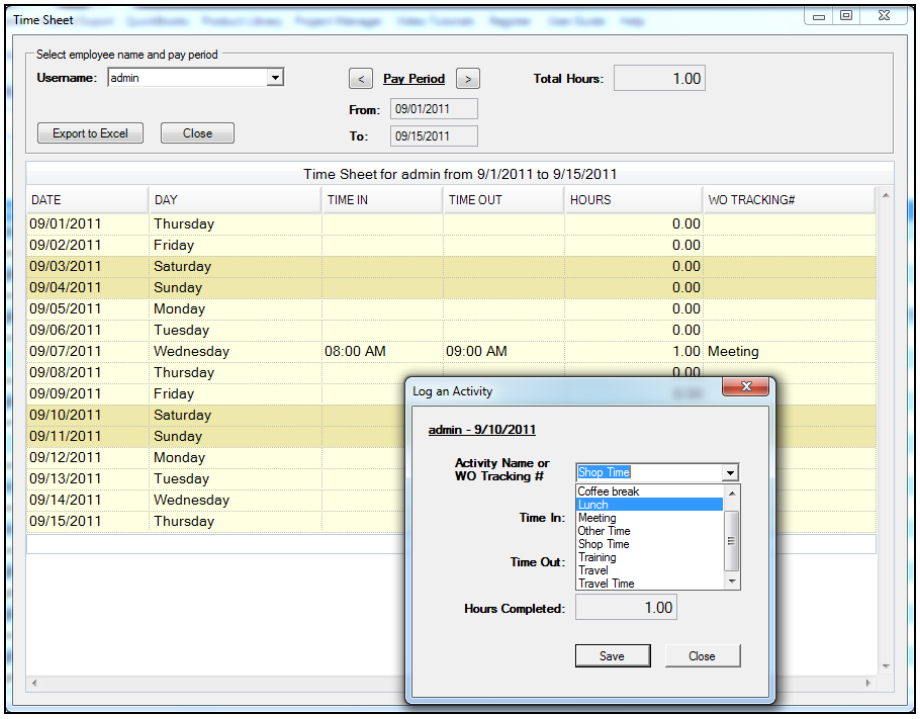
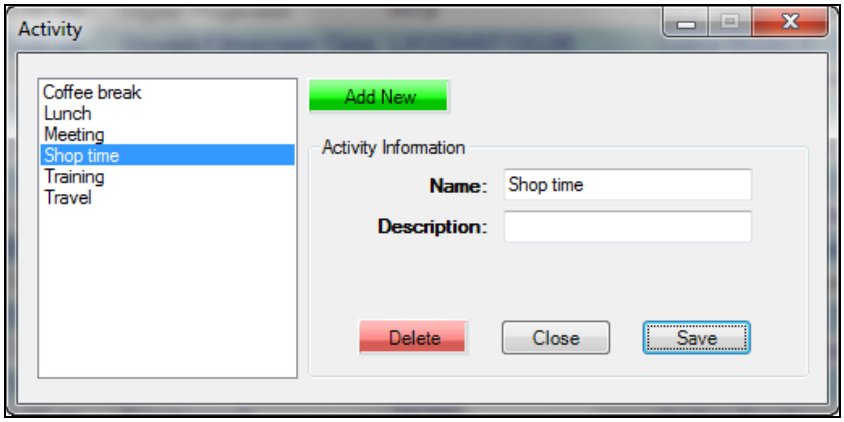
calendar. QTM indicates a QuickTask created by a mobile user. The names also include the date created followed by an incremental number for that date. For example: QT-062516-4.



These Activities can be created or edited from the Settings/Activity Menu.



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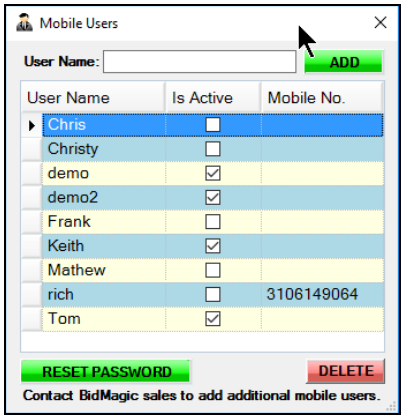
CONNECTING MOBILE TECHS TO THE CALENDAR:

NEW IPHONE & ANDROID APPS:

Our new version includes the option to connect mobile users with "BidMagic Tech Calendar" - new apps in the Apple and Google App stores. We are adding lots of new features to these new apps. Install the app on each iPhone or Android phone to connect those phones to your BidMagic Calendar.

Mobile User Setup

To add or change mobile users assigned to your Calendar, click on the Project Menu/Mobile Users. This form allows you to add, edit or delete the iPhone users that are connected to BidMagic's Calendar. You can add up to the limit of Mobile Connect users that you have purchased. To add more mobile users, contact BidMagic sales. Include the mobile phone number for each user.



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iPhone/Android Setup

Download the BidMagic Tech Calendar App from Apple's App store or Google Play. This will connect to a demo login. To connect to your BidMagic enter the Username, Password and URL information you have been furnished. In the example above, the three fields would be: **Username:** Matthew **Password:** BidMagic *(for first login)* **URL:** http://usertech.bidmagic.biz Type in your URL with "tech" included after user name.	

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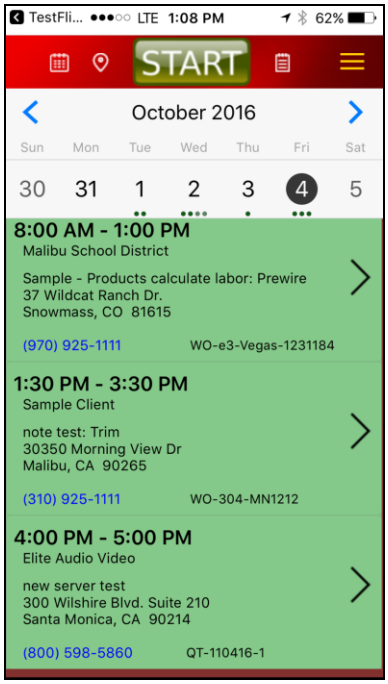
Tech Calendar Page on Mobile Devices

This is the landing page that defaults to today's date. Users can navigate on the Calendar and see work orders, service tickets and QuickTasks. These display the task name, address, phone and work order number. Click on a work order, service ticket or QuickTask to open it. The dots under the date indicate the number of tasks scheduled for that date. The menu icon provides navigation to other pages and features. Dark green indicates a completed appointment. Once you select an appointment, icons can provide navigation to map and notes for that appointment.



Click on the Green Start Button to Select an Appointment, QuickTask or Activity

The Calendar Page allows you to select from your scheduled appointments or just click the green Start button to begin a new QuickTask or an everyday Activity like Lunch, Break, Shop, etc. These activities can be managed in BidMagic's Project Menu.

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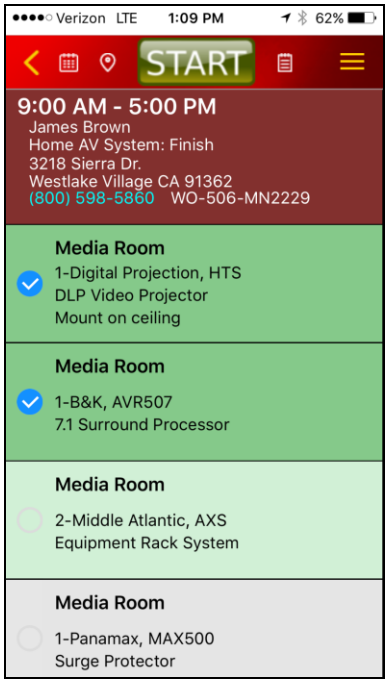
Work Order Page

Once a Work Order, Service Ticket or QuickTask is selected, users can see the tasks assigned to them along with any install notes. Icons provide additional navigation to Maps and Notes for the selected appointment. Clock in to the job first. Once clocked in, you can click on each checkbox to indicate tasks that are complete. Light green indicates a task that has been assigned to you. Dark green indicates a completed task. Additional Tasks are shown with a gray background at the bottom. This is very helpful when a tech completes all work or needs more.



Map/Direction Page

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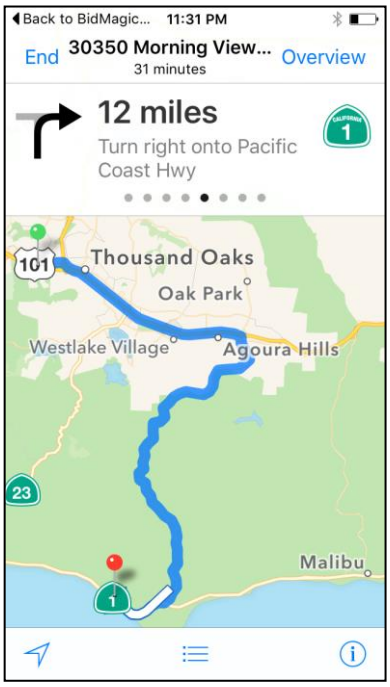
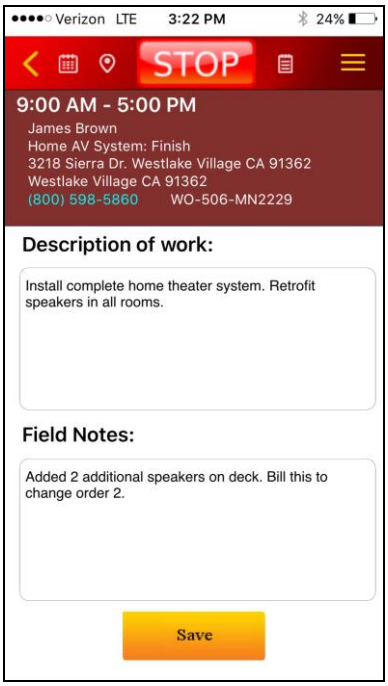
The page displays a map and directions to the jobsite. Options include turn by turn directions and routing info. Be sure to allow the BidMagic app and your Map app to access your location in the device settings.



Notes Page

The page shows the Description of Work sent from BidMagic (read only) and allows techs to enter Field Notes which are sent when the user hits save.



Time Clock Page

The time clock lets users clock in and out of the job or travel to and from the job. Once you have clocked into a work order, you must clock out before clocking in to another work order. Users can clock in and out multiple times if needed to keep track of lunch, breaks, etc. BidMagic records the GPS locations of mobile users only at the times when they clock in and out. These events can be viewed at your office. We recommend setting Privacy/Location settings to allow when using

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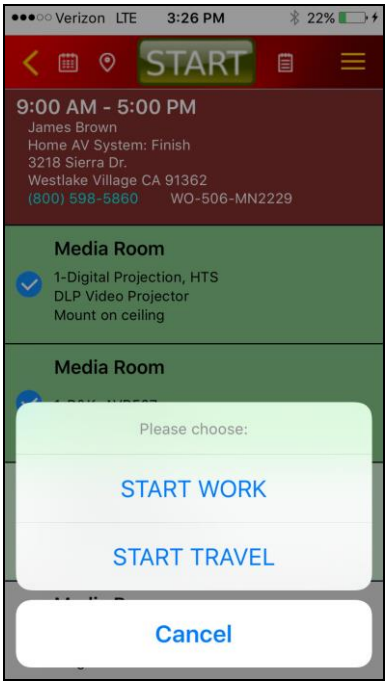
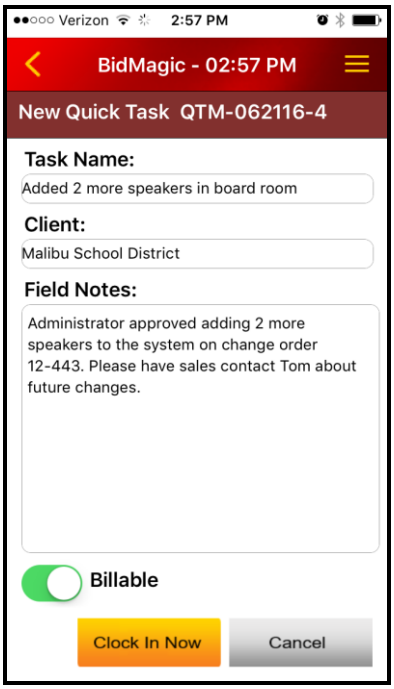
BidMagic app. If you do not wish to view Map data or have this data recorded, set the Privacy/Location Settings in your mobile device to Off for BidMagic.



New Mobile QuickTask

Mobile users can create their own Mobile QuickTask. Name the task, select the client, include Field Notes and mark if billable. This is for real time tracking of time and materials, not for future scheduling. Mobile users must immediately clock in to the event and clock out when completed.



Menu Navigation

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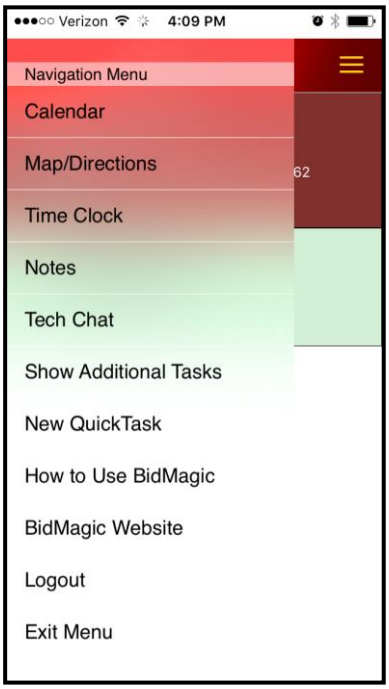
The Menu Icon appears in the upper right. Click on the icon or swipe right on the page to open the menu that provides navigation to pages and features. Menu choices vary by active screen and include tips and a link to video training.



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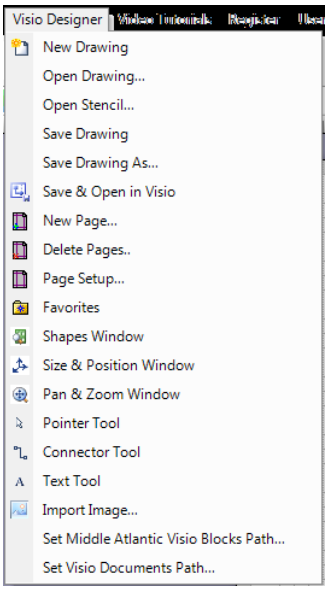
VISIO INTERFACE (OPTIONAL)

BidMagic can create floor plan and elevation drawings with Microsoft Visio 2010-2016. Products in BidMagic can be assigned Visio shapes. Each Proposal will create folders for the room or areas containing the assigned Visio shapes. If your proposal includes 6 speakers in a room, the Floor Plan and Elevation folders will contain 6 shapes ready to add to that area in your drawing. These drawings can be printed or automatically assembled into the printed Proposal. Please refer to Visio documentation for training on how to user their popular drawing program.

Open The Drawing(s) for a Bid:

BidMagic automatically creates a new drawing for each Bid. Click on Visio Designer Tab, then click on a Client and Bid to open the drawing(s) associated with a Bid. The drawing pallet will be blank if no drawing has yet been started. Be sure to Save your drawings. During Save, BidMagic will ask if you want to associate the drawing with the selected bid. This keeps your drawing filed with your Bid and the associated drawing can be assembled directly into your Client Proposals.



Visio Tools Menu and Icons:

To access Visio Tools in BidMagic, click on the Visio Designer Menu or one of the Tool Icons shown at the top. In BidMagic, hold your mouse pointer over any Icon to display the Tool name. Other Visio Tools can be accessed with Shortcuts shown at the end of this section of the User Guide.

Set Page Size and Scale for Drawings:

If you want BidMagic to automatically assemble your drawings, use Page Settings of 8.5” by 11” – portrait or landscape. (Larger page sizes will cause automatic scaling) If you plan to print these drawings separately, you can choose any size or orientation that your printer supports. Click on the Page Setup Icon the Page Size tab to select paper size. Click on Drawing Scale Tab to set Architectural Scale. See the example below where scale is ¼” = 1’ 0”. Another common scale is 1/8” = 1’ 0”.

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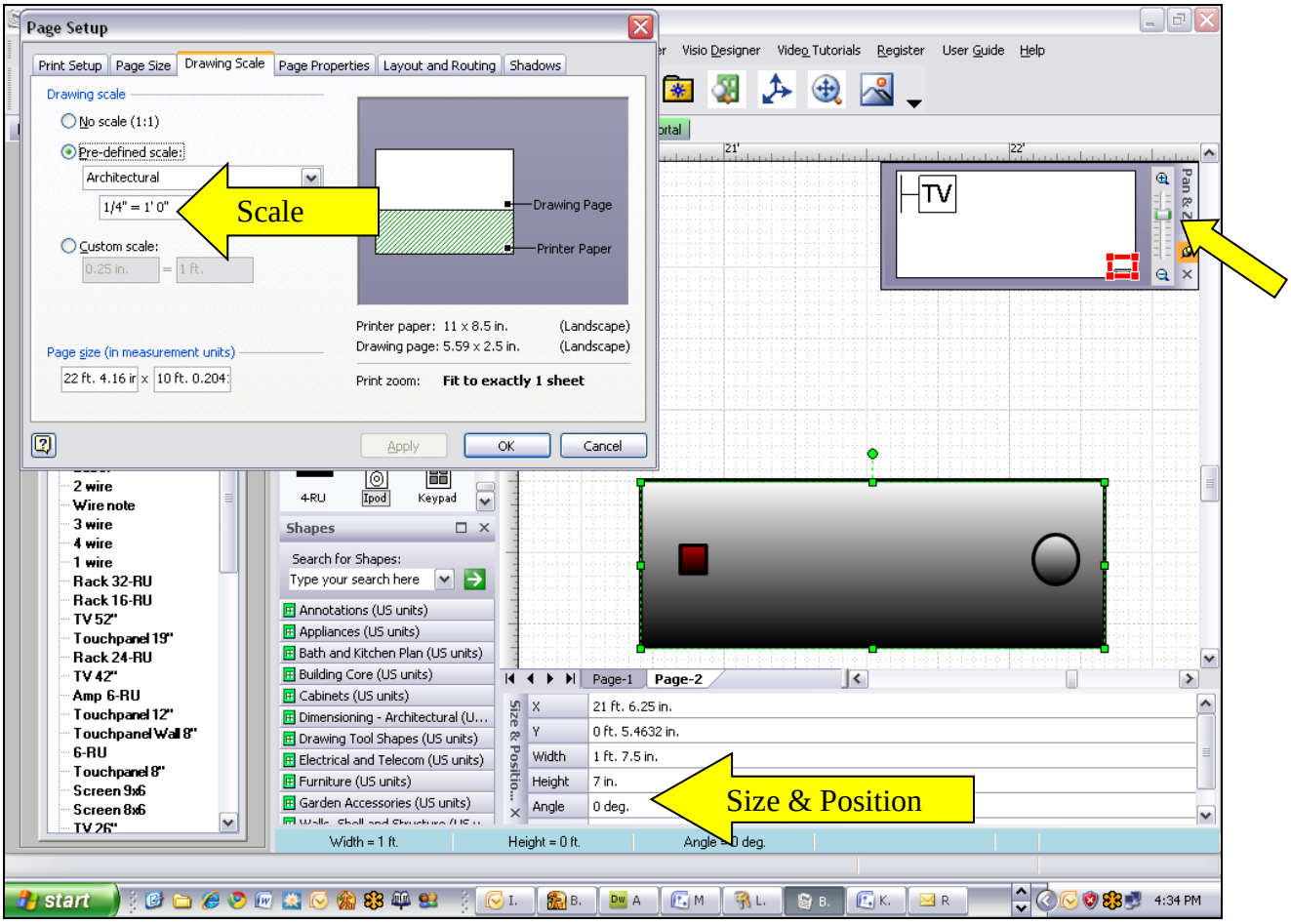

The Size and Position window shows exact dimensions to scale for selected shapes in your drawing. This is powerful because you can resize the drawings to the exact size you desire. Drag the image corners or directly enter size values in width and height for accurate scale drawings. This is particularly helpful for screen sizes and products where measurements need to be exact to be included in racks or cabinets. The Shapes in Bid Feature dynamically sizes Shapes per dimensions in BidMagic's Product Manager.

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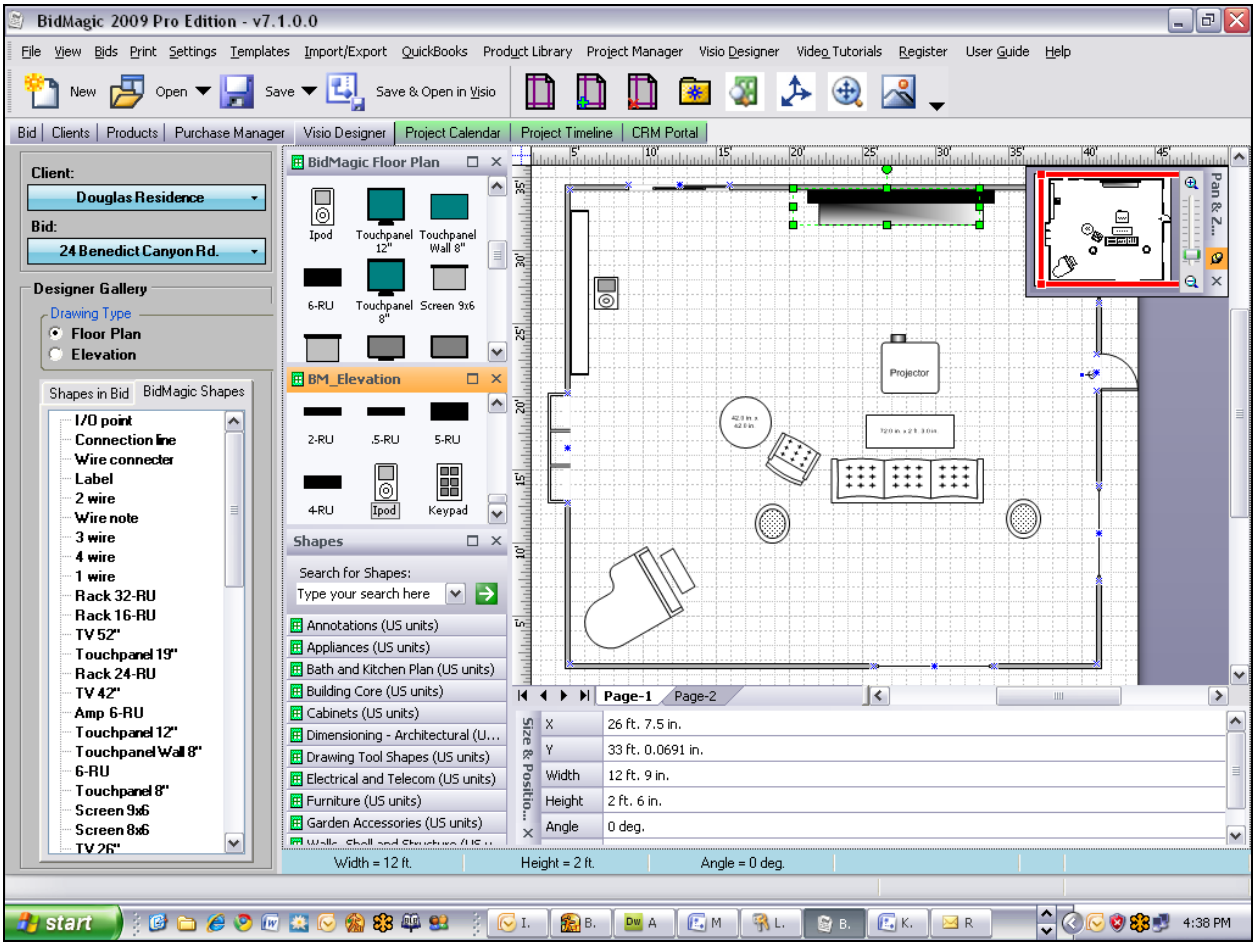
Bids, Drawings and Shapes:
You can select any Client and Bid to view the drawings associated with that job. If no drawing has yet been created, the drawing pane will be empty. Below the blue bars, you can select Floor Plan or Elevation Drawings.



Tracking Shapes in a Bid: Click on Shapes in Bid to view a list of Rooms found in that Bid with Visio Shapes listed in each room. If a bid contains 6 speakers in a room, this window will contain 6 speaker shapes (one for every product that has a shape assigned). Double click a Product to add it to the drawing. Then drag the product to the correct room position in the drawing. This method helps users track the exact number of shapes that need to be assigned.

Click on BidMagic shapes to access the full library of shapes to place in the drawing. This method lets you choose any available shape without tracking to the products in a bid.

Favorite shapes can Drag and Drop directly to the position in the drawing. This method offers lots of options and does not resize shapes, but does not track product shapes sent from the Bid.

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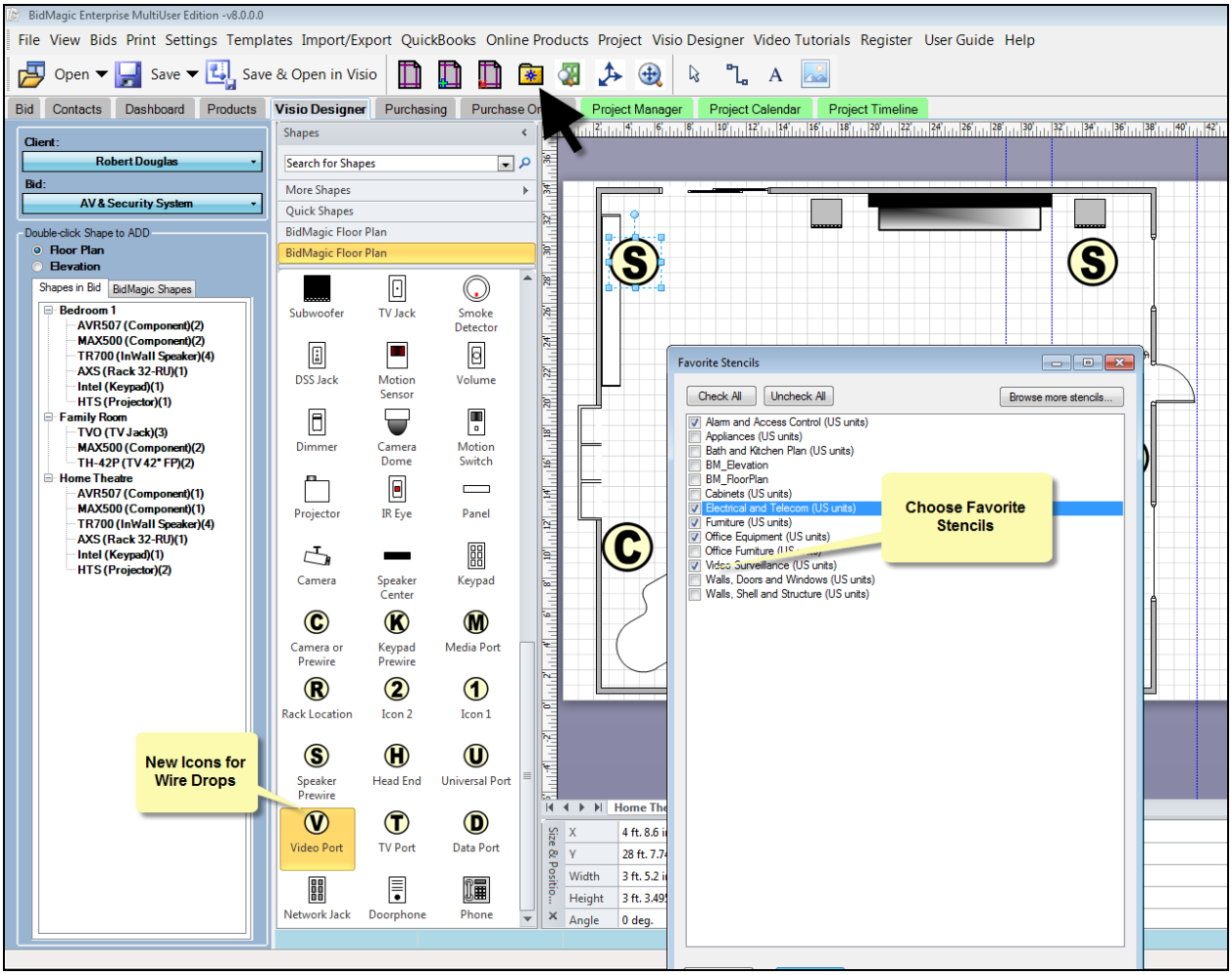
Viewing Favorite Stencils (Groups of Shapes)
Clicking on the Favorites Icon (folder) allows you to select your favorite Stencils (Groups of Shapes) that will appear in your Shapes Window. Select from Middle Atlantic and other Visio shapes. You can browse for more Stencils (groups of Shapes) to add to your Favorites List.



Zooming, Scrolling and Panning in Visio Drawings:
To zoom in or out, hold down the CTRL key as you rotate the mouse wheel forward or backward. To scroll up or down, rotate the mouse wheel forward or backward. You can also hold down both the CTRL and SHIFT keys. The pointer turns into a magnifying glass. Set that on the center of the area you want to resize. Then, click the left mouse button to enlarge the view. Click the right mouse button to reduce the view. Another method is to hold down both the CTRL and SHIFT keys and click the left mouse button and drag. The resulting magnification depends on the size of the box that you create as you drag - the smaller the box, the greater the magnification.

CTL/Shift Left Click	Zoom In
CTL/Shift Right Click	Zoom Out
CTL/Shift Mouse Scroll	Zoom In/Out

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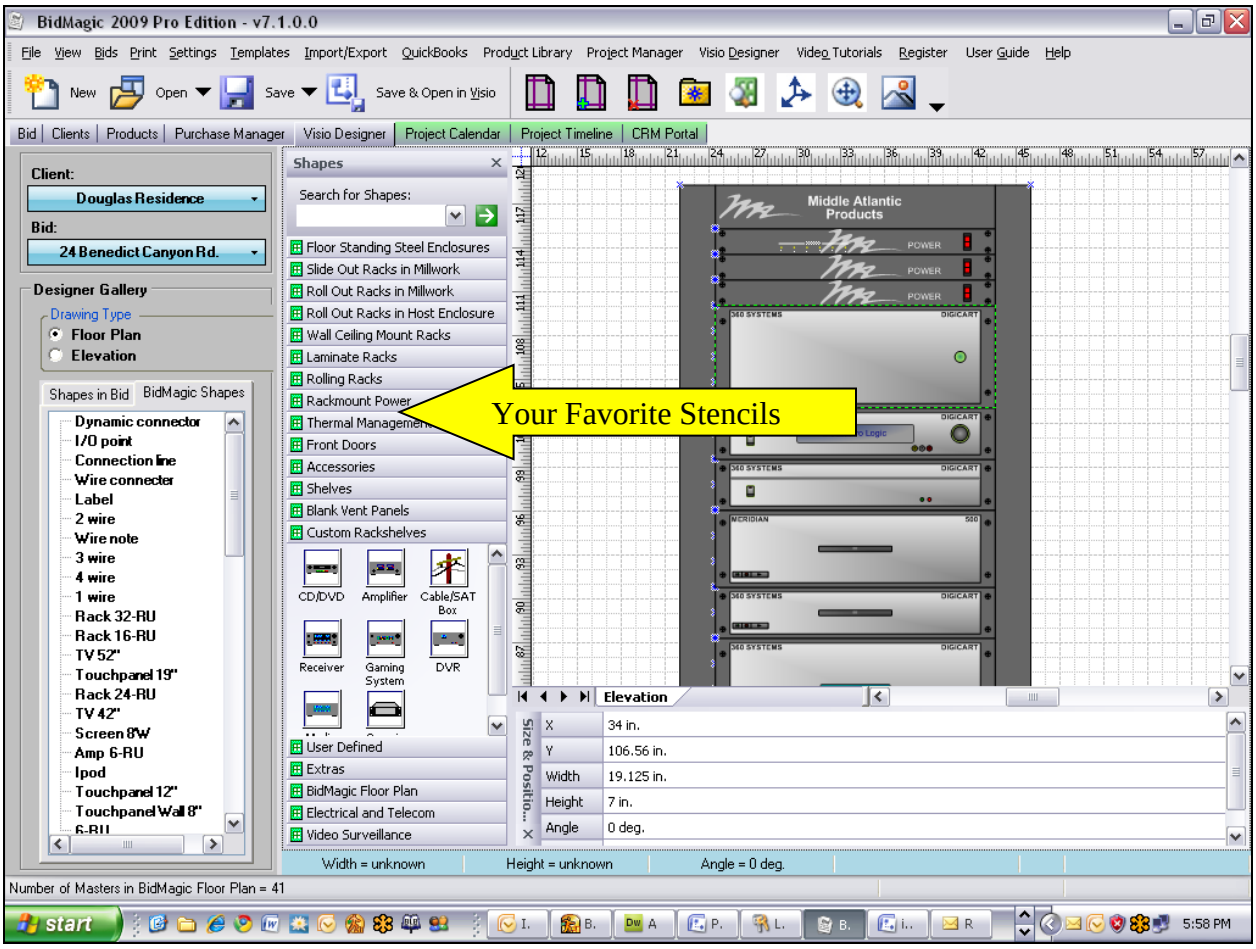
Creating Rack Drawings with Middle Atlantic Visio Blocks

Visio Blocks is a free program that also works with BidMagic and Visio. BidMagic will prompt you to download and install the software from Middle Atlantic. This is a high quality rack drawing program that creates rack drawings to scale and has a complete database for rack parts and custom rack shelves for most AV products. To see these rack products, make sure you Select Middle Atlantic in your Favorite choices. When adding a Middle Atlantic shape, you will need to manually select from Middle Atlantic's current database. We want to thank Middle Atlantic for making this partnership possible. Please register and download the software to get started.



Importing a Floor plan or Drawing Image:

In many cases, you can obtain a floor plan (blueprint) from the builder or architect you are working with so that you have accurately scaled professional drawings that are easy to populate with Visio Shapes for your equipment and installation. Visio can open Visio Drawing and CAD drawings. It can also import many professional formats including JPEG, TIF, BMP, GIF, PNG images and more. If you wish to work with a PDF, open the PDF and set the image view to 100% and then click CTL-C (Copy) Then open the Visio drawing and click CTL-V (Paste) to add it to your drawing. You can create original floor plans in Visio using the core building shapes, doors, windows, cabinets, etc. You can also create original drawings with various home design programs.

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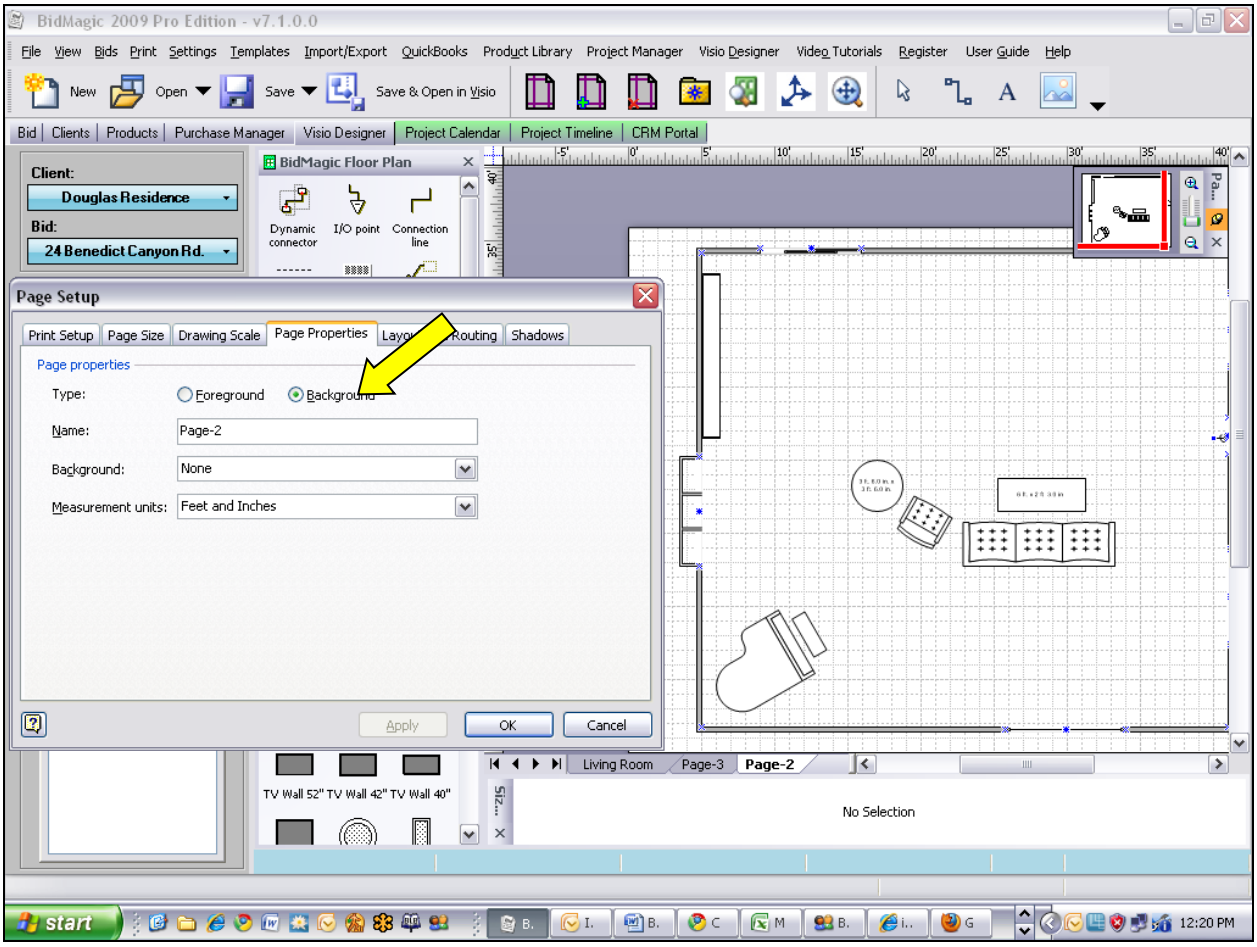
Set Image as Background:
After importing an image, Click on Page Settings, then Page Properties. Select Type: Background. This makes it easy to add icons to a drawing (such as a floor plan) without affecting the image in the Background.



Add, Delete, Rename and Reorder Drawing Pages:
You can create multi page drawings for inserting in Proposals. Click on Icons or Visio Menu to select from the choices. You can also right click on the Page-1 Tab at the bottom of the drawing window to access these controls. You can use Visio's drawing tools to connect devices and label the wires if desired.

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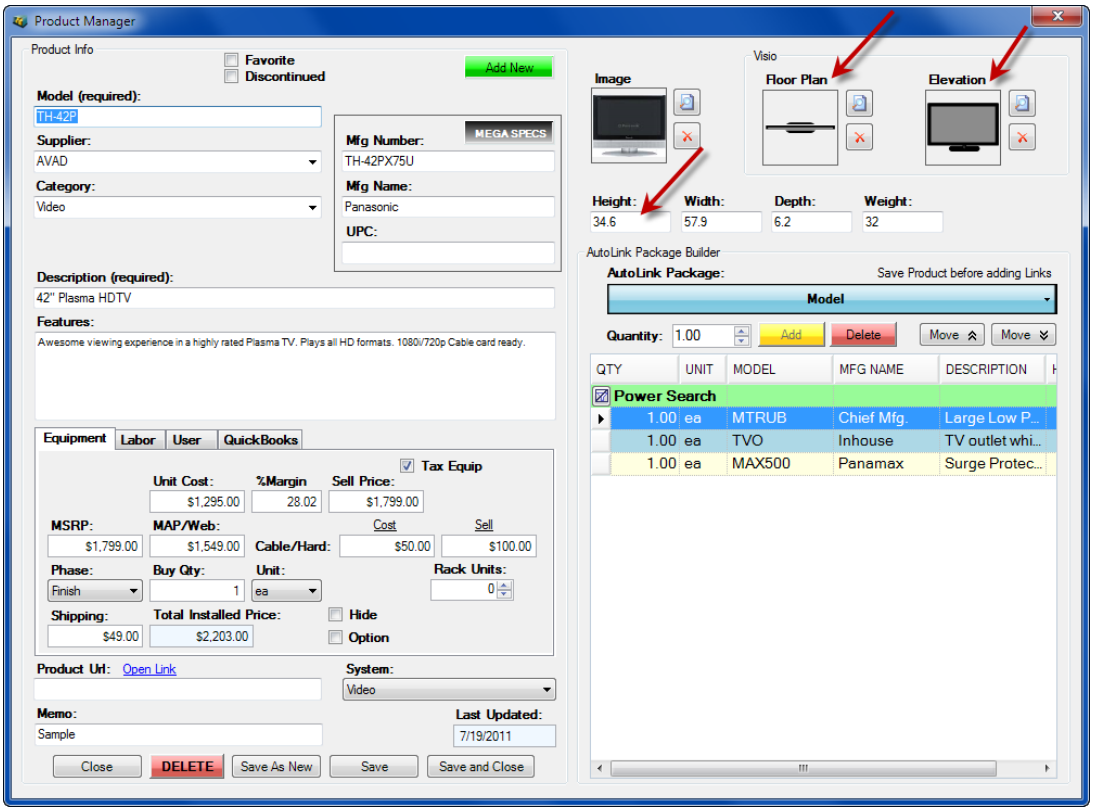
Assigning Visio Shapes to Products in BidMagic Products Manager:
You can assign 2 Visio shapes to each Product in BidMagic. Open a Product in BidMagic's Product Manager page. Then select the Visio shape (VSD) you want to assign for Floor Plans and Elevations. These will automatically be added to the shapes in Bid Folder for Floor Plan and Elevation drawings. If the Product contains dimensions they will be applied to the shape so that it is precisely scaled in Visio.



Dynamic Visio Shape Scaling based on Height, Width and Depth:
When pulled from the Shapes in Bid section, BidMagic applies dynamic sizing to scale the shapes from dimensions in the Product Manager for accuracy and time savings. If your drawings require additional precision scaling, you can easily adjust the drawing sizes inside Visio. We have included 100+ shapes. You can create additional shapes in Visio and add them to the Stencils or acquire them from 3rd party suppliers like NetZoom. Keep in Elevation Drawings will represent Height and Width. Floor Plan Drawings represent Width and Depth. Floor Plan Shapes with minimal depth will appear thin of course. Consider the depth of an iPod for example. Sometimes Shapes that easily mark the position may be preferred to dimensionally accurate shapes and/or overhead views.

Feel free to drag Shapes directly from the Elevation and Floor Plan Shapes Library when no scaling is desired. These choices are not directly related to Products so no dynamic scaling will occur.

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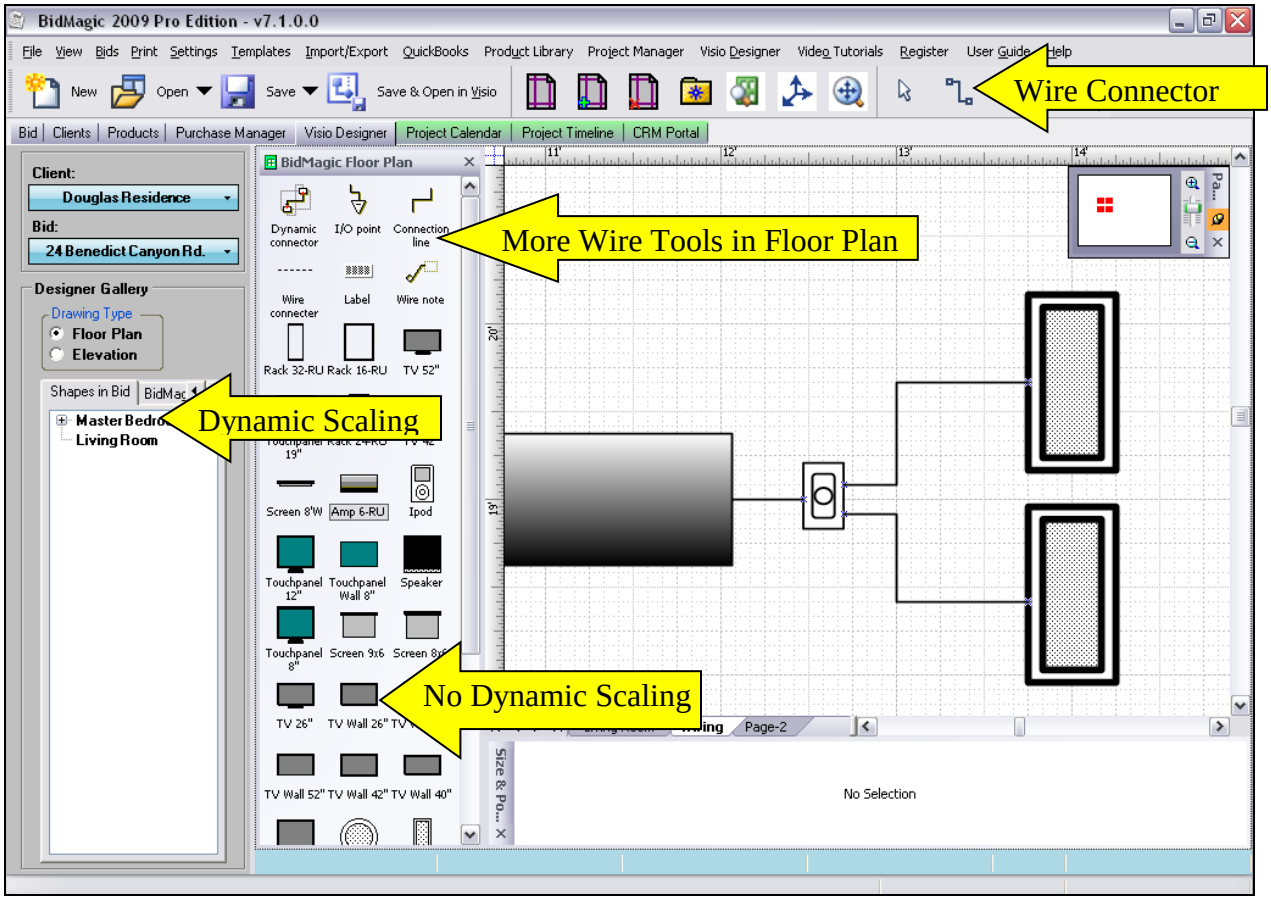

Adding Wiring Connections:

After adding products to a drawing, it is easy to add wire connections. You use the Connector Tool to create wire connections. You can also select the connections and edit and label wires and endpoints. Tools for dynamic wire connections, input/outputs, I/O points, wire labels, wire notes are found in the BidMagic Floor Plan shapes library and in Visio Shapes. After a little practice, you can create complex connection diagrams. Refer to Visio manuals for additional instruction. Note: BidMagic Product shapes do not include predetermined input and output data.

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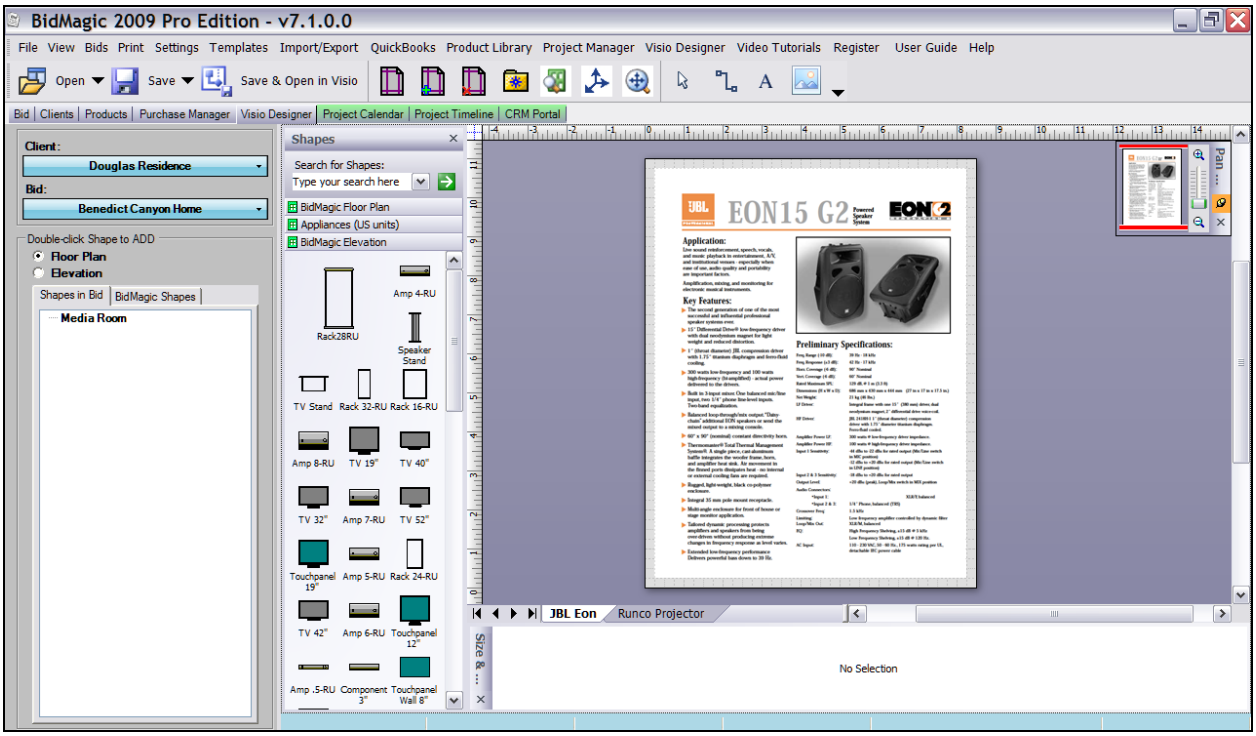
Adding Product Brochures, Cutsheets and Graphics:

Pages in the Visio Drawing area can be used to store Product photos, Cut sheets, Spec sheets and more. You can import multiple drawing formats including jpg, tif, gif and more. Product Cut sheets are often provided as PDF's. Copy and Paste a PDF onto the drawing surface to add to the Bid. This is better than pasting directly into a finished Word document, because these drawings can be stored with each Bid. Revising a Bid will retain these drawings that would be lost if they were manually edited in the Word Document Bid output.



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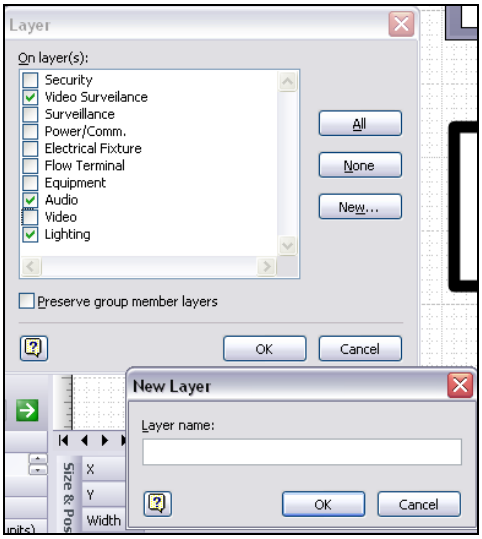
Adding and Using Layers in Drawings:
Right Click on a drawing then click Format and Layer to select or add layers. This allows you to create and edit individual layers where you can insert shapes and wiring for management of multi-system drawings. Also see setting Images as Backgrounds above.



Accessing Visio Tools:
BidMagic opens Visio 2007 or 2010 in a convenient window where you can easily locate the shapes associated with the products in your bid and add them to your drawings. Note that not all Visio tools and capabilities are directly available from inside this window.

If you need to work directly in Visio, click Save and Open in Visio if you need access to the additional features and drawing tools. You can continue to work on drawings there. Note: Visio is a register trademark of Microsoft Corporation.

To access more Visio Functions inside BidMagic, utilize the Visio Keyboard Shortcuts shown below. (Check Visio Documentation for a complete list of shortcuts.)

CTL/Shift Left Click	Zoom In
CTL/Shift Right Click	Zoom Out
CTL/Shift Mouse Scroll	Zoom In/Out

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HELPFUL VISIO KEYBOARD SHORTCUTS

To do this	Press
Switch the **Format Painter** tool on or off ( ).	CTRL+SHIFT+P
Select the **Connection Point Tool** ( ).	CTRL+SHIFT+1
Select the **Stamp Tool** ( ).	CTRL+SHIFT+3
Select the **Rectangle Tool** ( ).	CTRL+8
Select the **Ellipse Tool** ( ).	CTRL+9
Select the **Line Tool** ( ).	CTRL+6
Select the **Arc Tool** ( ).	CTRL+7
Select the **Freeform Tool** ( ).	CTRL+5
Select the **Pencil Tool** ( ).	CTRL+4
Select the **Crop Tool** ( ).	CTRL+SHIFT-

Consult Visio Documentation and Help for additional shortcuts.

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BIDMAGIC KEYBOARD SHORTCUTS

Use these handy keyboard shortcuts to speed up your work:

F12	Add Item to the Bid (on Bid Page) / Add New Product (on Product Page)
Enter/Enter	Save Product in Product Table or Product Manager (skips confirmation)
Shift/Enter	Save Product in Product Table or Product Manager (skips confirmation)
Shift/Click	Allows multiple selections in Products and selects entire room in Bid
CTL/Click	Allows multiple selections of Products and of consecutive items in Bid
CTL/Rt Click	Add or edit a Purchase Note (on Bid line item or Purchase Screens)
CTL/A	Open User Registration Info (Help/About)
CTL/F	Find Product in Asset Manager
CTL/G	Open User Guide
CTL/P	Open Print Preferences for Client Copy
CTL/H	Open Help/About
CTL/R	Refresh Cached Data
Double Click	On Price Level and Sales Tax column headers selects/deselects all in current Bid
F5	Refresh the active screen

When Opening the Product Finder:
A standard left click begins a new search, but a right click recalls the previous search results.

Right click operations in Tables:
Right click on Bid line item to open/edit that product.
Right click on Room Name in Bid to open Room Settings.
Right click on a Contact to open full view
Right click on line in Dashboard opens navigation menu to
Bid/Client/Job Settings/Job Folder/Delete Bid(s)/Purchase Orders
Right click on Product to open single product view.
Right click on Purchasing line item opens navigation menu to
Go to Job/Go to Project Manager
Right click on Purchase Order table to open/edit that PO.
Right click inside a PO opens submenu Go to Job/ Delete selected item(s) from PO.

You can customize the Icon Shortcuts to your taste. Click on the down arrow at the right end of a Toolbar. Then click add or remove buttons, then click customize. This allows you to arrange icons and to assign keyboard shortcuts by clicking on the keyboard button.

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PRINTING WIRE LABELS WITH DYMO RHINO LABELERS

Dymo Rhino Labelers are the preferred method of creating labels for all types of wire, cable and other installation needs. Labels can be printed on various tapes and directly onto shrink wrap tubing. You will need a labeler with the capability of accepting input from Excel CSV files.

Here are the steps: Open a Bid and Print the Install Copy to Excel. This report includes a list of all products, model numbers, room names, etc. Open the Excel file and delete extra columns that do not need to be printed. You can also add additional columns with wire numbers if needed. Save this edited file in .csv (comma separated values) format. Use this file with Rhino software to import for label printing. Consult with Dymo Rhino if you need tech support for their products.

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TROUBLESHOOTING PROBLEMS:

Problem: I am having difficulties installing BidMagic

Solution: Installing BidMagic involves several steps including installing SQL Server Express. If your experience trouble installing BidMagic, please contact tech support. We do not recommend uninstalling and reinstalling the software, as this generally causes problems.

Problem: When I try to preview or print a bid or report, I see code that looks like HTML code.

Solution: BidMagic requires Word 2007-2013 or Office 365 to print documents. Please check your version of MS Word.

Problem: I tried to customize a template and now it gives errors.

Solution: BidMagic includes special templates designed for users with Word 2010-2016 to customize. The header areas are open for easy access. Other areas of these reports contain formatting that may not work if deleted. Some elements are contained in tables that can be modified. Be sure to save a copy of the original templates and a copy of the templates that you have modified.

Problem: When I print a client bid, there is a problem with column and tab alignment.

Solution: The Description field can hold up to 60 characters. The Features field can hold up to 700. If you enter more than that amount, they may not print properly. Keep the Description short and use the Features for more detailed information. If your descriptions are too long, you can choose a smaller or narrower font for the document or the template. You can also choose our Custom3 template that offers more space for descriptions. When Word merges multiple documents, formatting and footers from page 1 can preempt formatting in remaining pages.

Problem: How do I locate a saved copy of a bid in Word?

Solution: Print Preferences allows you to choose the path where all BidMagic Word docs are saved. These document names contain Bid Name and date printed. BidMagic automatically saves copies of documents into the Job Folder when previewed or saved. See Default settings and shared paths for more information. This special method allows users to deploy reports to non-BidMagic users and use standard folder permissions to control user access to this information. Saving a Word copy is different from saving a bid in BidMagic. Bids are automatically saved.

Problem: My Bid gives an error when I try to print it.

Solution: This can be caused by importing product data that has errors. Click Help/Run Clean Up Query to clean up your product data. This is a good troubleshooting step that can also help resolve some other issues.

Problem: I never get automatic updates when I open BidMagic.

Solution: It is very important to receive BidMagic updates. If are connected to the internet when BidMagic starts, it will search for automatic updates. Some firewalls, security programs and Vista can

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block this from occurring. If you do not receive updates, or see an error during updating, please turn off firewalls and security programs and then restart your computer and BidMagic. If this does not resolve the problem, contact support for assistance. Vista users may need to set properties and permissions for this in security.

Problem: When I startup BidMagic, I get an error message that it could not connect to SQL.

Solution: When BidMagic starts, it also starts your database which is held in SQL. Sometimes, depending on your computers speed, ram, or available resources, BidMagic is ready before SQL is also ready. That is not a problem. Simply click Ignore, Save, OK, then restart BidMagic. If this problem persists, contact support.

Problem: Some boxes inside BidMagic appear to be cutoff. The Add buttons cannot be fully seen.

Solution: Reset the screen font DPI. Right click on your desktop then click properties. Select Settings/Advanced. Reset the DPI to 96 (Normal). You will need to restart Windows for this to take effect. You can still choose the screen resolutions you want in the Settings window to achieve the size and resolution that best fits your display.

Problem: A multiuser cannot add or edit products in the table or see certain bids.

Solution: This is controlled by administrative permissions. Contact your system administrator to verify the permissions you have been assigned.

Problem: When I view or print the proposal in Word, I sometimes get a blank page.

Solution: BidMagic templates communicate with Word to assemble a final merged document. Word attempts to enforce paragraph and page breaks to the best locations. Sometimes, due to the number of items in a room or section, they cannot always fit automatically on the page space provided. This can be corrected quickly and easily by adjusting the Word document. Add a line or page break as needed. If the FIRST room in the bid is too long to fit on the first page, it may leave a blank page. Consider putting a shorter room first that fits better.

Problem: I do not see changes to templates after I edit them.

Solution: Your Templates Menu many not point to the active path. Click Templates/View Template Path to confirm that the templates are shown there. See Default settings and shared path management.

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FAQ'S

Q. Does BidMagic require any other software?

A. To print reports and edit templates Word 2010-2016 is required. Excel 2010-2016 is needed for Excel reports. MS SQL Server Express is included and can facilitate up to 10 licensed concurrent users. Larger companies may choose to purchase full SQL licenses from Microsoft.

Q. I already have my products entered in my current software. Will I have to re-enter them in BidMagic?

A. If you currently have your products in Excel, QuickBooks or other data, or if your suppliers offer you product data, it can be imported into BidMagic after some preparation. We include an Import Wizard that helps you prepare the format of your data for BidMagic. Our new QuickBooks interface makes sending Products, Clients and Vendors to BidMagic a snap! You can pull contacts with Microsoft Outlook to save retyping.

Q. I love the way the program works, but I want the client copy to look differently. Can I do that?

A. The way your proposal looks is very important. It represents your style and image. BidMagic comes preloaded with different styles of client printouts including the options to show/hide different items (found in PRINT/PREFERENCES MENU). This represents over 1,000 different variations. All printouts can be output to MS Word so that you can format them to your liking, changing fonts, headers, adding graphics and color, etc. If you prefer a unique look just for your company, you can modify the Word templates with Word 2007-2016 and include your company logo, etc. automatically in the custom templates. Sample opening sections and closing scope, terms and conditions are included.

Q. Can I use BidMagic on Apple computers?

A. Apple's current models with Intel Processors can run Windows applications in a separate partition. That includes BidMagic. You may need Parallels or Virtual PC software. You will also need a Windows version of MSWord on that computer. If you want to integrate with QuickBooks, you will need a Windows version of QuickBooks also.

Q. Can I use BidMagic on multiple computers?

A. Pro and Enterprise users can setup a simple desktop shortcut to connect additional PC's together. This is the preferred method. You can also set the database connection string to point to a shared SQL database. BidMagic includes SQL Express which can accommodate up to 10 concurrent users. More users are possible if you purchase a full version of SQL Server. Our tech support will assist you in setting up multiuser installations on a network or server. Remote BidMagic users can be configured to connect to the SQL database via VPN (virtual private network). Additional configurations are available for web access or for multiusers who want to work without any connection (using Portable bids). Gigabit network connections assure good performance.

Q. I have several people who need access to BidMagic. How many licenses do I need?

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A. You will need to purchase a license for activation on each PC where the software is installed. Server installations need one license for each user login. See EULA (license agreement) for more details.

Q. Can I use BidMagic with a remote desktop connection to a PC, iPad or other tablets?

A. Yes, it can be very convenient to setup a remote desktop connection to your PC and this does not require an additional license unless you are connecting to a server. This type of desktop sharing provides a good connection to BidMagic or other programs on your PC when you only need to connect occasionally. LogMeIn does a good job for remote PC connections. To connect from an iPad, we recommend using Parallels Access from the Apple store. It works great on an iPad. Remote connections require an internet connection to a PC running BidMagic. Our Calendar system also delivers work orders and service tickets to iPhone and iPad calendars via Outlook Exchange.

Q. Can I hide the manufacturer's names and model numbers from the client copy to discourage clients from shopping the prices?

A. Yes. This is a selection in Print Preferences. You may also want to setup your own in-house model numbers for the product, for example Sony 42" HD Plasma TV. Then enter the actual manufacturer's part number into your product table for your internal reference and purchase orders. You can also hide complete line items and charge them just as Cable/Hardware. To hide just the model number, simply uncheck model number in the Print Preferences. If you wish to hide other items set the font color for that item in the template to 'white' and it will not print.

Q. What about future software upgrades?

A. Future software upgrades are included at no additional charge with the software assurance plan. We are constantly innovating and adding new features to the software. Please email support with your features requests.

Q. When does the software assurance need to be renewed?

A. The software assurance plan requires renewal in January of each calendar year to renew your license and to keep BidMagic software running. If you chose not to renew, your software will shut down at that time.

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