



Enterprise Version

Setup and Deployment Planning Workbook

See website for version features comparison.

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(Click on Edit/Search in Reader or CTL-Click in Table of Contents)

Requires Activation for use and annual renewal of Software Assurance.
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BIDMAGIC ENTERPRISE FEATURES AND USER PERMISSIONS

BidMagic is powerful, feature rich software that creates a comprehensive workflow with the ability to manage users and control the features and operations they can access. Multi-users can work together, collaborating via the shared SQL database and shared Job Folders.

The Enterprise version provides a host of advanced permission based features that allow management to oversee and control the process and workflow involved. Since the Enterprise version includes advanced user controls, it is essential that the administrator properly sets up these features and assigns permissions to the appropriate users. Otherwise, users may be denied access to needed features.

HOW TO USE THIS WORKBOOK & THE COMPANION EXCEL SPREADSHEET

This manual goes beyond the basic setup that is described in the BidMagic User Guide and in the video tutorials.

The first section of this workbook is designed to assist management in the process of collecting and consolidating the information needed for a smooth implementation of BidMagic's workflow. We recommend that managers setup a meeting to define the workflow and permissions included in this worksheet.

The second section is a step by step guide for entering the collected data into BidMagic. To begin, your copy of BidMagic must be registered and set to Enterprise and Multi-user mode. Which is shown in the upper left corner of your PC screen. Contact our support department if you need assistance with this step.

After this data is organized on the Excel spreadsheet as a reference, it is easier to enter the details into BidMagic.

SETTINGS FOR YOUR COMPANY

Use the accompanying Excel worksheet to setup the following:

Shared Templates

BidMagic is designed to make it easy to share documents on your network or server. If Templates are not shared, each individual BidMagic user can manage and edit these as needed. Sharing Templates allows consistency so that all report formats are the same.

Public and Private Job Folders

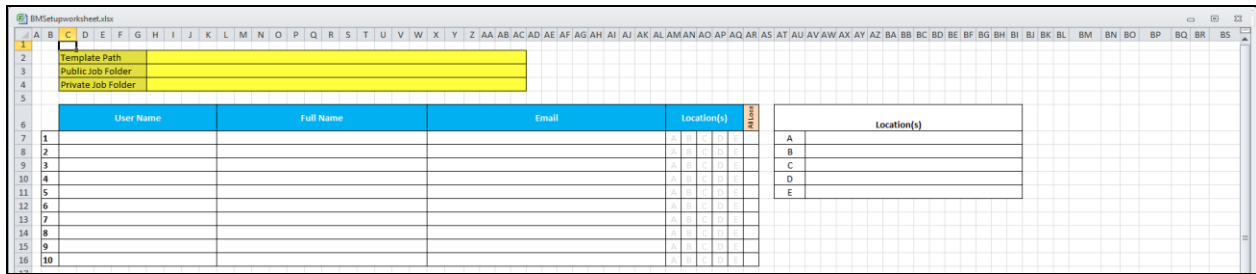
When BidMagic documents are previewed in Microsoft Word or Excel, these documents can be saved into BidMagic's Private Job Folder. BidMagic also saves PDF copies (to protect them from being edited) into the Public Job Folder.

These output documents can be easily accessed in your environment even by users who do not have a seat of BidMagic. Your IT team should set file permissions in your network to manage access for various users.

Use the form to insert the desired paths for the Report Templates, Public and Private Job Folders.you want to partition BidMagic with multiple locations or departments to control access to the Bids/Jobs associated with

those locations or departments? Users can be given permission to view all or only view within their location or department.

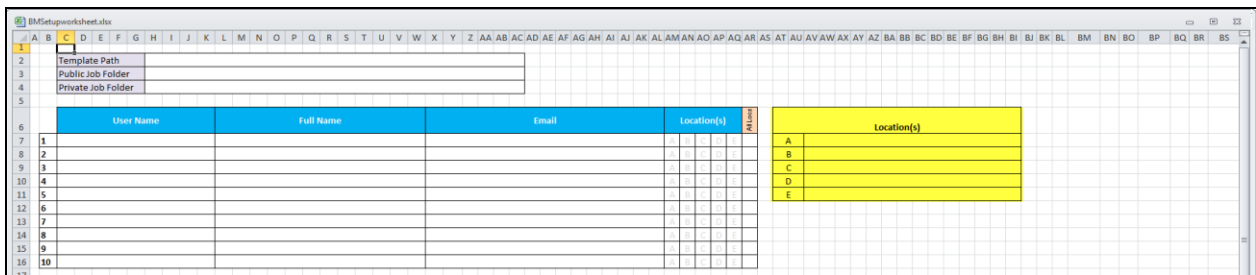
If yes, name the locations or departments. (This also establishes multiple inventories which may or may not be your desired result.)



SETTING PARTITION CHOICES FOR LOCATIONS/DEPARTMENTS

Do you want to partition your operations with multiple locations or departments in BidMagic to control access to the Bids/Jobs associated with those locations or departments? Users can be given permission to view all or only view within their location or department.

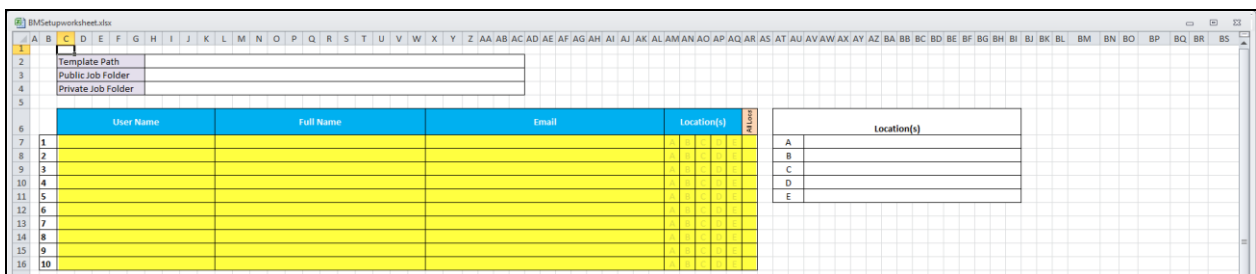
If yes, name the locations or departments. (This also establishes multiple inventories which may or may not be your desired result.)



ASSIGNING USER LOCATION ACCESS

Please list the names of all people who need access to BidMagic in the User Setup Worksheet with their contact information.

If you have established multiple locations/departments, check a single location for each user or all locations. The choices here include a single location or all locations.



		User Profile Worksheet																																	
		Order Status		Status Notifications								Order Status Email Notifications																							
General Profile		Advanced User Settings										Bid Created	Sold Needs Approval	Jobsite Survey Completed	Ready to Start	Job In Progress	Job Completed	Ready to be invoiced	Paid in Full	Other	Order Request	Order Approved	On Order	Item Received											
Administrator	Add / Edit Product	Approve Job Number	Create Packing Lists	Set Notifications	Edit Locked Job	Management Reports	Access Central Purchasing Screen	Add / Edit Asset Tracking	Bid Create on Behalf Salesperson	Select Location / Dept	Request PO	Approve PO Request	Order Products	Receiver / Allocate Products	Set to My Jobs	Required All Jobs	Set to My Jobs	Required All Jobs	Set to My Jobs	Required All Jobs	Set to My Jobs	Required All Jobs	Set to My Jobs	Required All Jobs	Set to My Jobs	Required All Jobs	Set to My Jobs	Required All Jobs	Set to My Jobs	Required All Jobs	Set to My Jobs	Required All Jobs	Set to My Jobs	Required All Jobs	
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ASSIGNING PURCHASE STATUS NOTIFICATIONS (BY PRODUCT)

BidMagic can track Purchase Order Statuses in a similar way. Note that each Job can have only a single status at any given time. However, within a Job, there may be hundreds of different products that need to be ordered, received, allocated, etc. BidMagic has the power to track the Order Status of every single product within a Job and also send email notifications whenever a change to the Order Status of products is updated.

		User Profile Worksheet																																	
		Order Status		Status Notifications								Order Status Email Notifications																							
General Profile		Advanced User Settings										Bid Created	Sold Needs Approval	Jobsite Survey Completed	Ready to Start	Job In Progress	Job Completed	Ready to be invoiced	Paid in Full	Other	Order Request	Order Approved	On Order	Item Received											
Administrator	Add / Edit Product	Approve Job Number	Create Packing Lists	Set Notifications	Edit Locked Job	Management Reports	Access Central Purchasing Screen	Add / Edit Asset Tracking	Bid Create on Behalf Salesperson	Select Location / Dept	Request PO	Approve PO Request	Order Products	Receiver / Allocate Products	Set to My Jobs	Required All Jobs	Set to My Jobs	Required All Jobs	Set to My Jobs	Required All Jobs	Set to My Jobs	Required All Jobs	Set to My Jobs	Required All Jobs	Set to My Jobs	Required All Jobs	Set to My Jobs	Required All Jobs	Set to My Jobs	Required All Jobs	Set to My Jobs	Required All Jobs	Set to My Jobs	Required All Jobs	
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ENTERING YOUR CHOICES FROM EXCEL INTO BIDMAGIC

Check the boxes in this section to assign what features the user can access. An administrator has permission to set these partition your operations with multiple To begin, your copy of BidMagic must be registered and set to Enterprise and Multi-user mode. Which is shown in the upper left corner of your PC screen. Contact our support department if you need assistance with this step.

Then, you will need to login as an administrator

BidMagic Enterprise MultiUser Edition -v7.7.8.0

File View Bids Print Settings Templates Import/Export QuickBooks Online Products Project Video Tutorials Register User Guide Help

Clients Rooms Bid Settings Job Folder Refresh New Bid Duplicate Bid Walkthru New Service Preview

Bid | Dashboard | Products | Purchasing | Purchase Orders | Project Manager | Project Calendar | Project Timeline

Client: **Sample Client** Rooms: **Galcomy** COPY Move View Room: All

Bid: **Sample - Labor added as needed** Model: **Search My Products** DELETE Move View All

Search by Category	ROOM	QTY	UNIT	MFG NAME	MODEL	DESCRIPTION	SELLPRICE	TOTALPRICE	TAX EQUIP	TOTAL LBR.	HIDE	OPTION	INSTALL NOTES
FAVORITES	Conference Room	1.00	ea	Runco	HTS	DLP Video Projector	\$9,990.00	\$9,990.00	<input checked="" type="checkbox"/>	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	add notes here
None	Conference Room	1.00	ea	B&K	AVR507	7.1 Surround Processor	\$2,995.00	\$2,995.00	<input checked="" type="checkbox"/>	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	
Accessories	Conference Room	1.00	ea	Panamax	MAX500	Surge Protector	\$139.00	\$139.00	<input checked="" type="checkbox"/>	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	
Audio	Conference Room	2.00	pr	Speakercraft	TR700	Ceiling Speakers	\$389.00	\$778.00	<input checked="" type="checkbox"/>	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	
Interconnects	Conference Room	1.00	ea	Middle Atlantic	AXS	Equipment Rack System	\$329.00	\$329.00	<input checked="" type="checkbox"/>	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	
Keypads	Conference Room	1.00	ea	Niles	Intel	Intellicontrol System	\$1,199.00	\$1,199.00	<input checked="" type="checkbox"/>	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	
Labor	Conference Room	8.00	ea		Install Hr	Hours - Installation Labor	\$0.00	\$0.00	<input checked="" type="checkbox"/>	\$680.00	<input type="checkbox"/>	<input type="checkbox"/>	
Mounts	Labor	5.00	ea		Install Labor	Install Labor	\$0.00	\$0.00	<input checked="" type="checkbox"/>	\$425.00	<input type="checkbox"/>	<input type="checkbox"/>	
Rack													
Remotes													
Security													