Enterprise Version

Setup and Deployment Planning Workbook

See website for version features comparison.

www.bidmagic.com

Email: support@bidmagic.com

(805) 309-0100

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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.
GENERAL AND ADVANCED USER PERMISSIONS

Check the boxes in this section to assign what features the user can access. Keep in mind that only an administrator will have permission to set the permissions for all of the users. We recommend having only 1 or 2 administrators.

Advanced Permissions deal with management oversight and control of Purchase Order processes. If you activate the Three Step Order Process in Default Settings, you have additional control over these activities.

UNDERSTANDING JOB STATUS WORKFLOW

BidMagic includes 4 default Job Statuses that form the foundation and starting point for tracking the progress of Bids and Jobs.

1. When a Bid is created, the Status is set to Bid
2. When a Bid is sold and approved, the Status is set to Job.
3. When a Service Call is created, the Status is set to Service Call.
4. When Marked Inactive, the Status is set to Inactive (and can only be found by searching Inactive.)

ADDING YOUR OWN CUSTOM JOB STATUS WORKFLOW (BY JOB)

The Enterprise version BidMagic’s Job Status setup lets you create a unique standard workflow for your company. The diagram below shows sample entries like: Job ready to start, Job in Progress, Ready to Invoice, etc. Take some time to define the specific action steps (Job Statuses) that you want to track. Then you can check the boxes for each user(s) with permission to SET TO (or SIGN OFF) for that Job Status. Then check the boxes indicating the users who need an email notification whenever any Job reaches that Status or a notification when their jobs reach that status. Carefully consider the order that the Job Statuses follow and enter them in that order.
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.

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.
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