

User Guide 2020

All Versions

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

Website: <u>www.bidmagic.com</u>

Email support: support@bidmagic.com

Visit our Knowledge Base http://knowledgebase.bidmagic.com/kb/root.aspx

Phone support: (805) 309-0100 x 2

Adobe[®] Reader Search Features to Help Navigate this PDF Guide (Click CTL F or Edit/Find or Advanced Search or CTL-Click in Table of Contents)

Ka Search - Ca X	DidMagicUserGuide.pdf - Accese Reader	
Arrange Windows	File Col View Window Help	
Looking For:	G Doda Out-Z	3 / 221 - + 73.78
Autolink in the current document Results: 1 documents with 20 instances New Search	Cut Delex Cot Cotory Cotory Cotory Delete Delete	e Ber
Results:	Sejlect All Ctrl+A Dgselect All Shift+Ctrl+A	99 Mansality - Create Equipment Only and Laker Only Item
Structure View Packages and System	Copy File to Clipboard	a For Automatic Detail of Cable, Hardware and Accountries
Sing AutoLinks For Automatic Detai	Take a Snapshot	A1 (nine Search Tools Suts ciption)
QTV, AutoLink Package Settings, Pric an AutoLink Package, please select w Set Autolinks to normally be ON or O	Check Spelling + Look Up "AutoLink"	led with Online Product Search Task Satorrysisn)
Sefore Autolinked Products can be a	G Find Ctrl+F	and the second
💱 like AutoLink Packages and Product I	Adyanced Search Shift+Ctrl+F	Tor Create a New Cartact
Autolink Packages allow a product h set Autolinks to normally be On or O Using Autolink Packages and System whow Autolinked Packages are added bid. Autolinks can add Products from	Protection Analygis Accessability Preferegces- Cbri+K	Crite dock in Contents to go to selected page Ar selected page Ar

Requires activation for use and annual renewal of Software Assurance.

Program and Manual ©2020 BidMagic BidMagic is a registered trademark. BidMagic is a Colorado corporation.

August 6, 2020 Revision 10.0.0

CONTENTS

Contents			1
NEW IN THIS VERSION: 10.0			11
-			
Registering/Activating Your S	oftware		13
KEEP SAFE Bidmagic OFFSITE BAG	CKUPS!!		14
Watch the Video Tutorials!			
HOSTING BIDMAGIC IN THE C	LOUD (Optional)		
How to Install BidMagic on m	ultiple PC's Do not use THE Downlo	oad installer for Additional PC's:	16
Product & Pricing Strategies - Set	tup		
Beginning User - Enter Lab	or Manually - Create Equipment O	nly and Labor Only Items	
		d Control	
		Hardware and Accessories	
Reaching Technical Support			
Help/About - View Your Ac	ctive Features		
Features Comparison By Vers	ion		20
BidMagic Screen TABS			21
Navigating with Screen Tabs .			21
Icon Shortcuts			
Power Search Filters			22
Settings Menu			23
Default Settings for New Bids	(Global Settings)		23
	• •		
-			
•			
•			
-			
Products Table – Global Products	s View		
Index Tabs			
Adding Products to the Table			
Common Field Names			35
Adding Products to a Bid			35
BidMagic User Guide	© 2020 BidMagic Corp.	All rights reserved	Page 1

What the Client Will See in the	Printout		36
Unit			37
Creating A Special Product for	Customizable use:		37
Product Manager (Single Product	View)		38
•			
-			
Editing Product Data			41
Find/Replace data in the Products	s Table		42
Create Your Own In-House Model	Numbers		42
Product Categories and Subcateg	ories		43
Building Product Packages			44
Addina an Item or a Packaae to a	Bid		45
		re) Together	
ACOLURING Products and Prices for a	your product list		47
		Product Search Tools Subscription)	
		ne Product Search Tools Subscription).	
	-		
•	•		
•			
-			
-		sid	
		n	
•	•		
Hiding Line Items			61
	,		
• • •			
Turning a Bid Into a Job (with or v	vithout Approval)		67
Copy Bid using Current Update	ed Prices		69
BidMagic User Guide	© 2020 BidMagic Corp.	All rights reserved	Page 2

Reset Order Statuses on New Bid	
Copy BidMagic Docs Folder Contents	
DeActivate Original Bid	
Change Orders	
Create a New Stand Alone Change Order	
Revise an Existing Bid with the Changes	
Create a New Revision of the Bid with the Changes	
Create a New Revision of the Bid with the Changes Create New Change Orders Plus Merge All Changes into a Single Bid	
Equipment Sales Tax	
Optional Labor Tax	
Optional Use Tax (Based on Cost)	
Optional GST (HST) or VAT Tax	
Surtax – with Rate and Limit	
The Bid Summary Section	75
Labor AutoCalc	75
Adjust +/- Fudge Factor	
Created Date, Submitted Date, Sold Date, Inactive Status & Lock Bid	
View Profit Estimate	77
Using the Summary for Billing and Accounting	77
The Dashboard – Client/Bid Navigation center	77
-	
Dashboard Notes	
File Menu	
Open Portable Bid (Pro/Enterprise Feature)	
Save As Portable Bid	
Backup Database (Admin only)	
Restore Database (Admin only)	
Moving BidMagic to a new system (with the Backup / Restore Utility)	
Backup Utility	
Advanced Method	
Refresh	
Restart	
Exit	
View Menu	
Bid	82
Products	82
Project Manager	82
Show Line Item Prices	82
Show Price Summary	82
Paginate Products (Optional)	82
Float Product Search	83
View Ad Hoc Products (Enterprise Version)	83
View All Bids (Multiusers Only) (Pro/Ent Feature)	84
Category Finder	
Touchscreen	84
Touchscreen View	84
Touch Screen Bids	85
Activity Log	85
Inventory (Enterprise or Optional Pro Feature)	
Sales Pipeline (Pro/Enterprise Feature)	
Timesheet (Calendar Only)	
Refresh	86

	87
New Bid	
Copy Bid Items	
Duplicate Bid	
Share Bid (Pro/Enterprise Multiuser only) Delete Bid	
New Service (Pro/Enterprise Feature	
Print Menu	
Client Bid	
Print Preferences	
Style (Template)	
Show/Hide Prices & Details info for Client Bid	
Showing Equipment Prices or Labor Prices on Line Items Show Room/Area Subtotals	
Breakdown Labor Phases	
Show Product URL	
Show Product Images	
System Summary (Pro/Enterprise Feature)	
Show Optional Totals	
Total Items Only (No Rooms) - (Pro/Enterprise Feature)	
Print All or select a Phase for Client Bid (Pro/Enterprise Feature)	
Auto Assemble THE Proposal	
Adding Opening and Closing Documents	
Preview in Word	
Preview as PDF	
Changing Custom Template & Cover Names Shown in Print Preferences	
Important Standard Margins, Headers and Footers for Word Documents	
Client Bid Templates Provide Presentation Options	
Opening and Closing Document Samples	
Print Menu (continued)	
Install Copy	96
	96
Install Copy Sales Report Service Ticket	96 96 96
Install Copy Sales Report Service Ticket Client Report	
Install Copy Sales Report Service Ticket Client Report Profit Report - Excel Worksheet	
Install Copy Sales Report Service Ticket Client Report	
Install Copy Sales Report Service Ticket Client Report Profit Report - Excel Worksheet	96 96 96 96 96 96 96 96
Install Copy Sales Report Service Ticket Client Report Profit Report - Excel Worksheet Dimension Report	96 96 96 96 96 96 96 96 97
Install Copy Sales Report Service Ticket Client Report Profit Report - Excel Worksheet Dimension Report Settings Menu Default Settings (Global Settings for New Bids) Include Hidden items in Room/Area subtotals and Total Equip or in Cable/Hard	96 96 96 96 96 96 96 97 97 97
Install Copy Sales Report Service Ticket Client Report - Excel Worksheet Profit Report - Excel Worksheet Dimension Report Settings Menu Default Settings (Global Settings for New Bids) Include Hidden items in Room/Area subtotals and Total Equip or in Cable/Hard Profit Markup vs Profit Margin	96 96 96 96 96 96 96 96 97 97 97 97
Install Copy Sales Report Service Ticket Client Report Profit Report - Excel Worksheet Dimension Report Settings Menu Default Settings (Global Settings for New Bids) Include Hidden items in Room/Area subtotals and Total Equip or in Cable/Hard Profit Markup vs Profit Margin Categories and Subcategories	96 96 96 96 96 96 96 97 97 97 97 97 97
Install Copy Sales Report Service Ticket Client Report Profit Report - Excel Worksheet Dimension Report Settings Menu Default Settings (Global Settings for New Bids) Include Hidden items in Room/Area subtotals and Total Equip or in Cable/Hard Profit Markup vs Profit Margin Categories and Subcategories Word Format Selection	96 96 96 96 96 96 96 97 97 97 97 97 97 97
Install Copy Sales Report Service Ticket Client Report Profit Report - Excel Worksheet Dimension Report Settings Menu Default Settings (Global Settings for New Bids) Include Hidden items in Room/Area subtotals and Total Equip or in Cable/Hard Profit Markup vs Profit Margin Categories and Subcategories Word Format Selection Organize by Systems (Pro/Enterprise Feature)	96 96 96 96 96 96 97 97 97 97 97 97 97 97 98 98
Install Copy Sales Report Service Ticket Client Report Profit Report - Excel Worksheet Dimension Report Settings Menu Default Settings (Global Settings for New Bids) Include Hidden items in Room/Area subtotals and Total Equip or in Cable/Hard Profit Markup vs Profit Margin Categories and Subcategories Word Format Selection Organize by Systems (Pro/Enterprise Feature) Activate Price Level (Pro/Enterprise Feature)	96 96 96 96 96 96 96 97 97 97 97 97 97 97 97 98 98 98
Install Copy	96 96 96 96 96 96 96 97 97 97 97 97 97 97 97 97 98 98 98
Install Copy	96 96 96 96 96 96 97 97 97 97 97 97 97 97 97 98 98 98 98 98
Install Copy Sales Report Service Ticket	96 96 96 96 96 96 97 97 97 97 97 97 97 97 97 97 98 98 98 98 98
Install Copy Sales Report Service Ticket Client Report - Excel Worksheet Dimension Report Settings Menu Default Settings (Global Settings for New Bids) Include Hidden items in Room/Area subtotals and Total Equip or in Cable/Hard Profit Markup vs Profit Margin Categories and Subcategories. Word Format Selection Organize by Systems (Pro/Enterprise Feature) Activate Price Level (Pro/Enterprise Feature) Enforce MAP Shared Path Management Set Template Path. Set BidMagic Job Folder Path	96 96 96 96 96 96 97 97 97 97 97 97 97 97 98 98 98 98 98 98 98
Install Copy Sales Report Service Ticket Client Report Profit Report - Excel Worksheet Dimension Report Settings Menu Default Settings (Global Settings for New Bids) Include Hidden items in Room/Area subtotals and Total Equip or in Cable/Hard Profit Markup vs Profit Margin Categories and Subcategories Word Format Selection Organize by Systems (Pro/Enterprise Feature) Activate Price Level (Pro/Enterprise Feature) Enforce MAP Shared Path Management Set Template Path Set BidMagic Job Folder Path	96 96 96 96 96 96 97 97 97 97 97 97 97 97 97 97 97 97 97
Install Copy Sales Report Service Ticket Client Report Profit Report - Excel Worksheet Dimension Report Settings Menu Default Settings (Global Settings for New Bids) Include Hidden items in Room/Area subtotals and Total Equip or in Cable/Hard Profit Markup vs Profit Margin Categories and Subcategories Word Format Selection Organize by Systems (Pro/Enterprise Feature) Activate Price Level (Pro/Enterprise Feature) Enforce MAP Shared Path Management Set Template Path Set BidMagic Job Folder Path Purchase Order Folder Path Purchase Order Folder Path Shared Path Management	96 96 96 96 96 96 97 97 97 97 97 97 97 97 97 97 98 98 98 98 98 98 98 98 98
Install Copy Sales Report Service Ticket Client Report - Excel Worksheet Profit Report - Excel Worksheet Dimension Report Settings Menu Default Settings (Global Settings for New Bids) Include Hidden items in Room/Area subtotals and Total Equip or in Cable/Hard Profit Markup vs Profit Margin Categories and Subcategories. Word Format Selection Organize by Systems (Pro/Enterprise Feature) Activate Price Level (Pro/Enterprise Feature). Activate Price Level (Pro/Enterprise Feature). Shared Path Management Set Template Path Set BidMagic Job Folder Path Purchase Order Folder Path Shared Path Management Rental Features (Pro/Enterprise Feature).	96 96 96 96 96 96 97 97 97 97 97 97 97 97 97 97 97 98 98 98 98 98 98 98 98 98 100 100 100
Install Copy Sales Report Service Ticket Client Report - Excel Worksheet Profit Report - Excel Worksheet Dimension Report Settings Menu Default Settings (Global Settings for New Bids) Include Hidden items in Room/Area subtotals and Total Equip or in Cable/Hard Profit Markup vs Profit Margin Categories and Subcategories. Word Format Selection Organize by Systems (Pro/Enterprise Feature) Activate Price Level (Pro/Enterprise Feature). Enforce MAP Shared Path Management Set BidMagic Job Folder Path Set BidMagic Job Folder Path Shared Path Management Rental Features (Pro/Enterprise Feature) International Features	96 96 96 96 96 97 97 97 97 97 97 97 97 97 97 97 97 97
Install Copy Sales Report Service Ticket Client Report Profit Report - Excel Worksheet Dimension Report Settings Menu Default Settings (Global Settings for New Bids). Include Hidden items in Room/Area subtotals and Total Equip or in Cable/Hard Profit Markup vs Profit Margin Categories and Subcategories. Word Format Selection Organize by Systems (Pro/Enterprise Feature) Activate Price Level (Pro/Enterprise Feature) Enforce MAP Shared Path Management Set Template Path. Set BidMagic Job Folder Path Purchase Order Folder Path Purchase Order Folder Path Shared Path Management Rental Features (Pro/Enterprise Feature). International Features Enterprise Features (see the section on Enterprise Features below)	96 96 96 96 96 96 97 97 97 97 97 97 97 97 97 97 97 98 98 98 98 98 98 98 98 98 98 100 100 100 100 101
Install Copy Sales Report Service Ticket Client Report - Excel Worksheet Profit Report - Excel Worksheet Dimension Report Settings Menu Default Settings (Global Settings for New Bids) Include Hidden items in Room/Area subtotals and Total Equip or in Cable/Hard Profit Markup vs Profit Margin Categories and Subcategories. Word Format Selection Organize by Systems (Pro/Enterprise Feature) Activate Price Level (Pro/Enterprise Feature). Enforce MAP Shared Path Management Set BidMagic Job Folder Path Set BidMagic Job Folder Path Shared Path Management Rental Features (Pro/Enterprise Feature) International Features	96 96 96 96 96 96 97 97 97 97 97 97 97 97 97 97 97 98 98 98 98 98 98 98 98 98 98 100 100 100 100 101

Bid Settings/General	
Sales Pipeline	103
Payment Plan (Pro/Enterprise Feature)	
User Manager (Pro/Enterprise-Multiuser Administrators only)	
Add New User	
User Permissions (Set by Administrator)	
Run Software Updates	105
Can Select All Bids	105
Can Update All Bids	105
Can Delete All Bids	105
View All Leads	105
Add/Edit Products	105
Edit Prices	105
Show Costs	105
Edit Calendar	105
Manage Inventory	
Clock In/Out	
Company Info	
Client	
Rooms	
Supplier	
Tax Rate	
Sales Stage	
Price Level (Pro/Enterprise Feature)	
Label Mapping – Customize BidMagic Screens and Reports	
Database Connection	
Change Password	
Templates Menu	
Cover 1-6	109
Custom 1	109
Custom 2	109
Custom 3 (Pro/Enterprise Feature)	109
Custom 4 (Pro/Enterprise Feature)	109
Custom 5 (Pro/Enterprise Feature)	109
Custom 6 (Pro/Enterprise Feature)	109
Custom 7 (Pro/Enterprise Feature)	109
Custom Rental 1 (Pro/Enterprise Feature)	109
Open Template Path (Access to All Templates)	109
Customizing Templates	
Opening Templates for editing (Custom Templates)	110
Setting the Template Path	
Open Template Path (Access to All Templates and Opening_Closing Documents)	
Adding Template Elements (Merge Fields) to Templates	
Ungrouped Template Elements:	
Grouped Template Elements:	
Adding Template Elements (Merge Fields) to Opening and Closing Documents	
Import/Export Menu	117
Import Products CSV (Comma Separated Values)	117
Preparing Excel Product Data for Importing	
Common Problems with Excel Pricesheet Formatting	
This Spreadsheet below is Now Ready to Import	
Some BidMagic Field Names:	
סטווים שמואומצור דוכות אמווכא.	

Importing Products with the Impor	rt Wizard	
Global Import Options		121
Export Products		
•	na Separated Values)	
Export Bid (XLS)		121
	ro/Enterprise Feature)	
	XML)	
-	XML)	
Import Inventory (Optional i	feature - Included in Enterprise Version	121
	ptional)	
	ickBooks	
Minimum version of QuickB	Books required	122
Connecting to QuickBooks the F	First Time	
-	Organize QuickBooks Items	
If you have trouble connecti	ing to QuickBooks the first time	125
Send QuickBooks Data to Bio	dMagic	125
Send BidMagic Data to Quic	kBooks	126
•	Books Estimate	
	uickBooks Invoice or Estimate	
	Books Sales Order (Enterprise & Premier Only)	
	chase Orders	
	oks	
Job Costing Tips for QuickBo	poks	130
QuickBooks ONLINE Interface (Opt	tional)	
-	ools (optional subscription)	
Online Products		133
Online Products View and Choose from Selec	cted Products	133 134
Online Products View and Choose from Selec Download Products to your	cted Products Products Table	133 134 134
Online Products View and Choose from Selec Download Products to your Searching Online MEGASPEC	cted Products Products Table CS Grabber (Included with Online Product Search Tools Subscription	
Online Products View and Choose from Selec Download Products to your Searching Online MEGASPEC Adding MEGASPECS Data to	cted Products Products Table CS Grabber (Included with Online Product Search Tools Subscription New or Existing Products	
Online Products View and Choose from Selec Download Products to your Searching Online MEGASPEC Adding MEGASPECS Data to Adding MEGASPECS to Mult	cted Products Products Table CS Grabber (Included with Online Product Search Tools Subscription New or Existing Products tiple Products in the Product Table (Included with Online Product S	
Online Products View and Choose from Selec Download Products to your Searching Online MEGASPEC Adding MEGASPECS Data to Adding MEGASPECS to Mult Subscription)	cted Products Products Table CS Grabber (Included with Online Product Search Tools Subscription New or Existing Products tiple Products in the Product Table (Included with Online Product S	
Online Products View and Choose from Selec Download Products to your Searching Online MEGASPEC Adding MEGASPECS Data to Adding MEGASPECS to Mult Subscription) Web Product Grabber (Inclu	cted Products Products Table CS Grabber (Included with Online Product Search Tools Subscription New or Existing Products tiple Products in the Product Table (Included with Online Product S	
Online Products View and Choose from Selec Download Products to your Searching Online MEGASPEC Adding MEGASPECS Data to Adding MEGASPECS to Mult Subscription) Web Product Grabber (Inclu Search AV-iQ Commercial Pr	cted Products Products Table CS Grabber (Included with Online Product Search Tools Subscription New or Existing Products tiple Products in the Product Table (Included with Online Product S uded with MEGASPECS Subscription) roducts with the Grabber (Included with Online Product Search Too	
Online Products View and Choose from Selec Download Products to your Searching Online MEGASPEC Adding MEGASPECS Data to Adding MEGASPECS to Mult Subscription) Web Product Grabber (Inclu Search AV-iQ Commercial Pr	cted Products Products Table CS Grabber (Included with Online Product Search Tools Subscription New or Existing Products tiple Products in the Product Table (Included with Online Product S uded with MEGASPECS Subscription) roducts with the Grabber (Included with Online Product Search Too	
Online Products View and Choose from Selec Download Products to your Searching Online MEGASPEC Adding MEGASPECS Data to Adding MEGASPECS to Mult Subscription) Web Product Grabber (Inclu Search AV-iQ Commercial Pr Product Sell Prices Multi-Unit Package Pricing n	cted Products Products Table CS Grabber (Included with Online Product Search Tools Subscription New or Existing Products tiple Products in the Product Table (Included with Online Product S uded with MEGASPECS Subscription) roducts with the Grabber (Included with Online Product Search Too notes:	
Online Products View and Choose from Selec Download Products to your Searching Online MEGASPEC Adding MEGASPECS Data to Adding MEGASPECS to Mult Subscription) Web Product Grabber (Inclu Search AV-iQ Commercial Pr Product Sell Prices Multi-Unit Package Pricing n	cted Products Products Table CS Grabber (Included with Online Product Search Tools Subscription New or Existing Products tiple Products in the Product Table (Included with Online Product S uded with MEGASPECS Subscription) roducts with the Grabber (Included with Online Product Search Too notes:	
Online Products View and Choose from Selec Download Products to your Searching Online MEGASPEC Adding MEGASPECS Data to Adding MEGASPECS to Mult Subscription) Web Product Grabber (Inclu Search AV-iQ Commercial Pr Product Sell Prices Multi-Unit Package Pricing n Video Tutorials	cted Products Products Table CS Grabber (Included with Online Product Search Tools Subscription New or Existing Products tiple Products in the Product Table (Included with Online Product S uded with MEGASPECS Subscription) roducts with the Grabber (Included with Online Product Search Too notes:	
Online Products View and Choose from Selec Download Products to your Searching Online MEGASPEC Adding MEGASPECS Data to Adding MEGASPECS to Mult Subscription) Web Product Grabber (Inclu Search AV-iQ Commercial Pr Product Sell Prices Multi-Unit Package Pricing n Video Tutorials Register	cted Products Products Table CS Grabber (Included with Online Product Search Tools Subscription New or Existing Products tiple Products in the Product Table (Included with Online Product S uded with MEGASPECS Subscription) roducts with the Grabber (Included with Online Product Search Too notes:	
Online Products View and Choose from Select Download Products to your Searching Online MEGASPEC Adding MEGASPECS Data to Adding MEGASPECS to Mult Subscription) Web Product Grabber (Inclu Search AV-iQ Commercial Pr Product Sell Prices Multi-Unit Package Pricing n Video Tutorials Register About (registration features	cted Products Products Table CS Grabber (Included with Online Product Search Tools Subscription New or Existing Products tiple Products in the Product Table (Included with Online Product S uded with MEGASPECS Subscription) roducts with the Grabber (Included with Online Product Search Too notes:	
Online Products View and Choose from Select Download Products to your Searching Online MEGASPEC Adding MEGASPECS Data to Adding MEGASPECS to Mult Subscription) Web Product Grabber (Inclu Search AV-iQ Commercial Pr Product Sell Prices Multi-Unit Package Pricing n Video Tutorials Register Help Menu About (registration features Create Support Ticket	cted Products Products Table CS Grabber (Included with Online Product Search Tools Subscription o New or Existing Products tiple Products in the Product Table (Included with Online Product S uded with MEGASPECS Subscription) roducts with the Grabber (Included with Online Product Search Too notes:	
Online Products View and Choose from Select Download Products to your Searching Online MEGASPEC Adding MEGASPECS Data to Adding MEGASPECS to Mult Subscription) Web Product Grabber (Inclu Search AV-iQ Commercial Pr <i>Product Sell Prices</i>	cted Products Products Table CS Grabber (Included with Online Product Search Tools Subscription o New or Existing Products tiple Products in the Product Table (Included with Online Product S uded with MEGASPECS Subscription) roducts with the Grabber (Included with Online Product Search Too notes:	
Online Products View and Choose from Select Download Products to your Searching Online MEGASPEC Adding MEGASPECS Data to Adding MEGASPECS to Mult Subscription) Web Product Grabber (Inclu Search AV-iQ Commercial Pr Product Sell Prices Multi-Unit Package Pricing n Video Tutorials Register About (registration features Create Support Ticket Compare BidMagic Versions	cted Products Products Table CS Grabber (Included with Online Product Search Tools Subscription o New or Existing Products tiple Products in the Product Table (Included with Online Product S uded with MEGASPECS Subscription) roducts with the Grabber (Included with Online Product Search Too notes:	
Online Products View and Choose from Select Download Products to your Searching Online MEGASPEC Adding MEGASPECS Data to Adding MEGASPECS to Mult Subscription) Web Product Grabber (Inclu Search AV-iQ Commercial Pr Product Sell Prices Multi-Unit Package Pricing n Video Tutorials Register Help Menu About (registration features Create Support Ticket Contact Compare BidMagic Versions Support Forum	cted Products Products Table CS Grabber (Included with Online Product Search Tools Subscription New or Existing Products	
Online Products View and Choose from Select Download Products to your Searching Online MEGASPEC Adding MEGASPECS Data to Adding MEGASPECS to Mult Subscription) Web Product Grabber (Inclu Search AV-iQ Commercial Pr Product Sell Prices Multi-Unit Package Pricing n Video Tutorials Register About (registration features Create Support Ticket Contact Compare BidMagic Versions Support Forum	cted Products Products Table CS Grabber (Included with Online Product Search Tools Subscription o New or Existing Products	
Online Products View and Choose from Select Download Products to your Searching Online MEGASPEC Adding MEGASPECS Data to Adding MEGASPECS to Mult Subscription) Web Product Grabber (Inclu Search AV-iQ Commercial Pr Product Sell Prices Multi-Unit Package Pricing m Video Tutorials Register About (registration features Create Support Ticket Compare BidMagic Versions Support Forum Check for Updates View Recent Changes	cted Products Products Table CS Grabber (Included with Online Product Search Tools Subscription o New or Existing Products tiple Products in the Product Table (Included with Online Product S uded with MEGASPECS Subscription) roducts with the Grabber (Included with Online Product Search Too notes:	
Online Products View and Choose from Select Download Products to your Searching Online MEGASPEC Adding MEGASPECS Data to Adding MEGASPECS to Mult Subscription) Web Product Grabber (Inclu Search AV-iQ Commercial Pr Product Sell Prices Multi-Unit Package Pricing n Video Tutorials Register About (registration features Create Support Ticket Contact Compare BidMagic Versions Support Forum Check for Updates View Recent Changes Run Clean Up Query Reset Monitor	cted Products Products Table CS Grabber (Included with Online Product Search Tools Subscription) New or Existing Products tiple Products in the Product Table (Included with Online Product S uded with MEGASPECS Subscription) roducts with the Grabber (Included with Online Product Search Too notes:	133 134 134 134 134 135 learch Tools 137 137 137 137 137 137 137 137
Online Products View and Choose from Select Download Products to your Searching Online MEGASPEC Adding MEGASPECS Data to Adding MEGASPECS to Mult Subscription) Web Product Grabber (Inclu Search AV-iQ Commercial Pr Product Sell Prices Multi-Unit Package Pricing n Video Tutorials Register About (registration features Create Support Ticket Contact Compare BidMagic Versions Support Forum Check for Updates View Recent Changes Run Clean Up Query Reset Monitor	cted Products Products Table CS Grabber (Included with Online Product Search Tools Subscription New or Existing Products tiple Products in the Product Table (Included with Online Product S uded with MEGASPECS Subscription) roducts with the Grabber (Included with Online Product Search Too notes:	

Action Menu - 60 144 Selecting Products TO ORDER 145 Print Package Labels 147 PURCHASE ORDER SCREEN 147 OPENING a Purchase Order TO REVIEW AND PRINT 147 Delete or Close a Purchase Order 148 Select Multiple Purchase Order for Batch Emailing or Printing 148 Select Multiple Purchase Order for Batch Emailing or Printing 148 Receiving Products on an ISSUED Purchase Order 149 INVENTORY MANAGEMENT OPTIONAL IN PRO, INCLUDED IN ENTERPISE VERSION 151 Automalier Settings 151 Use Inventory (Enterprise Feature or Optional in Pro) 151 Creating Professional Wire Labels with a Dymo Rhino Labeler 155 Sales Reports. 155 Settings/Company Info Menu 155 Delivering a Great Proposal 156 NEW Client Center 156 NEW Client Center 156 Signature Capture with Modows 8 & 10. 158 Deliver PDF for Signature with Adobe Sign. 159 Multiuser Connected) 160 True Multiuser Consected) 161 One at a Time Sharing (Pro/Enterprise Feature) 161 <	Action Menu - GO	143
Print Package Labels 146 Print Package Labels 147 PURCHASE ORDER SCREEN 147 OPENING a Purchase Order TO REVIEW AND PRINT 147 Delete or Close a Purchase Orders for Batch Emailing or Printing 148 Select Multiple Purchase Orders for Batch Emailing or Printing 148 Receiving Products on an ISSUED Purchase Order 149 INVENTORY MANAGEMENT OPTIONAL IN PRO, INCLUDED IN ENTERPRISE VERSION 151 Use Inventory (Enterprise Feature or Optional in Pro) 151 Use Inventory (Enterprise Feature or Optional in Pro) 151 Use Inventory (Enterprise Feature or Optional in Pro) 155 Sales Reports 155 Genet Contact Report 155 Stating S/Company Info Menu 155 Delivering a Great Proposal 156 NEW Client Center 156 NeW Client Center 158 Signature Capture with Windows 8 & 10 158 Deliver PDF for Signature with Adobe Sign 158 Standalone Multiuser Connected) 160 Tree Multiuser Connected Login (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 164 <t< td=""><td></td><td>144</td></t<>		144
Print Package Labels 147 PURCHASE ORDER SCREEN 147 OPENING a Purchase Order TO REVIEW AND PRINT 147 Delete or Close a Purchase Order 148 Select Multiple Purchase Order 148 Select Multiple Purchase Order 149 INVENTORY MANAGEMENT OPTIONAL IN PRO, INCLUDED IN ENTERPRISE VERSION 151 Automailer Settings 151 Creating Professional Wire Labels with a Dymo Rhino Labeler 155 Client Contact Report 155 Client Contact Report 155 Tar Table 155 Settings/Company Info Menu 155 Delivering a Great Proposal 156 NEW Client Center 156 Client Conter with Windows & 10. 158 Signature Capture in a PDF 158 Signature Capture with Adobe Sign 159 Multiuser Permissions and Features 160 True Multiuser Connections on Network or Server (Pro/Enterprise Feature) 161 One at Time Sharing (Pro/Enterprise Feature) 161 One at Time Sharing (Pro/Enterprise Feature) 161 Mutuser Login (Pro/Enterprise Feature) 162 Mutius	Selecting Products TO ORDER	145
PURCHASE ORDER SCREEN 147 OPENNING a Purchase Order TO REVIEW AND PRINT 147 Delete or Close a Purchase Order for Batch Emailing or Printing 148 Select Multiple Purchase Order for Batch Emailing or Printing 148 Receiving Products on AN ISSUED Purchase Order 149 INVENTORY MANAGEMENT OPTIONAL IN PRO, INCLUDED IN ENTERPRISE VERSION 151 Automailer Settings 151 Use Inventory (Enterprise Feature or Optional in Pro) 151 Creating Professional Wire Labels with a Dymo Rhino Labeler 155 Sales Reports. 155 Client Contact Report. 155 Settings/Company Info Menu 155 Delivering a Great Proposal 166 NEW Client Center 156 Client Contert Tracking. 157 Signature Capture with Mindows & 100 158 Signature Contert in a PDF 158 Signature Conterts (Prosting Provider Segn. 159 Multiuser Connections on Network or Server (Pro/Enterprise Feature) 160 True Multiuser Connections on Network or Server (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 164 Default Settings (Enterprise Ver	Print PACKAGE Labels:	146
OPENING a Purchase Order TO REVIEW AND PRINT 147 Delete or Close a Purchase Order 148 Select Multiple Purchase Orders for Batch Emailing or Printing 148 Receiving Products on an ISSUED Purchase Order 149 INVENTORY MANAGEMENT OPTIONAL IN PRO, INCLUDED IN ENTERPRISE VERSION 151 Automailer Settings 151 Creating Professional Wire Labels with a Dymo Rhino Labeler 155 Sales Reports 155 Cient Contact Report 155 Tax Table 155 Delivering a Great Proposal 156 NEW Client Center 155 Signature Capture with Windows & 10. 158 Delivering a Great Proposal 156 NEW Client Center 158 Signature Capture with Modows & 10. 158 Deliver PDF for Signature with Adobe Sign. 159 Multiuser Connections on Network or Server (Pro/Enterprise Feature) 160 True Multiusers (Disconnected) 161 Multiuser Login (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 164 Default Settings (Enterprise Version)	Print Package Labels	147
Delete or Close a Purchase Order. 148 Select Multiple Purchase Orders for Batch Emailing or Printing 148 Receiving Products on aN ISSUED Purchase Order 149 INVENTORY MANAGEMENT OPTIONAL IN PRO, INCLUDED IN ENTERPRISE VERSION 151 Automailer Settings 151 Use Inventory [Enterprise Feature or Optional in Pro) 151 Use Inventory [Enterprise Feature or Optional in Pro) 151 Creating Professional Wire Labels with a Dymo Rhino Labeler 155 Sales Reports. 155 Client Contact Report. 155 Tax Table 155 Settings/Company Info Menu 155 Delivering a Great Proposal 156 NEW Client Center 156 NEW Client Center in a PDF 158 Signature Capture in a PDF 158 Signature Capture with Adobe Sign 159 Multiuser Connections on Network or Server (Pro/Enterprise Feature) 160 True Multiuser Connections on Network or Server (Pro/Enterprise Feature) 161 One at a Time Sharing (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 164 Default Settings (Enterprise Version) 164	PURCHASE ORDER SCREEN	
Select Multiple Purchase Orders for Batch Emailing or Printing 148 Receiving Products on aN ISSUED Purchase Order 149 INVENTORY MANAGEMENT OPTIONAL IN PRO, INCLUDED IN ENTERPRISE VERSION 151 Automalier Settings 151 Use Inventory (Enterprise Feature or Optional in Pro) 151 Creating Professional Wire Labels with a Dymo Rhino Labeler 155 Sales Reports. 155 Client Contact Report. 155 Tax Table 155 Settings/Company Info Menu 155 Delivering a Great Proposal. 156 NEW Client Center 156 Client Center Tracking 157 Signature Capture with Windows 8 & 10. 158 Deliver PDF for Signature with Adobe Sign 159 Multiuser Pornicions on Network or Server (Pro/Enterprise Feature) 160 Tue Multiuser (Disconnected). 160 Tue Multiuser Cognic (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 164 Default Settings (Enterprise Version) 164 Default Settings (Enterprise Version) 164 Default S	OPENING a Purchase Order TO REVIEW AND PRINT	
Receiving Products on aN ISSUED Purchase Order 149 INVENTORY MANAGEMENT OPTIONAL IN PRO, INCLUDED IN ENTERPRISE VERSION 151 Automailer Settings 151 Use Inventory (Enterprise Feature or Optional in Pro) 151 Creating Professional Wire Labels with a Dymo Rhino Labeler 155 Sales Reports 155 Client Contact Report 155 Tax Table 155 Settings/Company Info Menu 156 Delivering a Great Proposal 156 Client Center 156 Client Center racking 157 Signature Capture with Windows 8 & 10 158 Deliver Por For Signature with Adobe Sign 159 Multiuser Permissions and Features 160 Standalone Multiusers (Disconnected) 161 Ture Multiuser (Dirterprise Feature) 161 Multiuser Upp (Pro/Enterprise Feature) 161 Multiuser Upp (Pro/Enterprise Feature) 162 Automatic Software Updates 163 Leapus/Rooms 164 Enterprise Administrator Settings 165 Use a Time Sharing (Pro/Enterprise Feature) 164 Enterprise Administrator	Delete or Close a Purchase Order	148
INVENTORY MANAGEMENT OPTIONAL IN PRO, INCLUDED IN ENTERPRISE VERSION 151 Automailer Settings 151 Use Inventory (Enterprise Feature or Optional in Pro) 151 Creating Professional Wire Labels with a Dymo Rhino Labeler 155 Sales Reports 155 Client Contact Report 155 Tax Table 155 Settings/Company Info Menu 155 Delivering a Great Proposal 156 NEW Client Center 156 Client Center Tracking. 157 Signature Capture in a PDF 158 Signature Capture in a PDF 158 Signature Capture with Adobe Sign. 159 Multiuser Porf for Signature with Adobe Sign. 150 Standalone Multiusers (Disconnected) 160 True Multiuser Connections on Network or Server (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 162 Automatic Software Updates 163 Multiuser Login (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 164	Select Multiple Purchase Orders for Batch Emailing or Printing	148
Automalier Settings 151 Use Inventory (Enterprise Feature or Optional in Pro) 151 Use Inventory (Enterprise Feature) 155 Sales Reports 155 Client Contact Report 155 Tax Table 155 Settings/Company Info Menu 155 Delivering a Great Proposal 156 NEW Client Center 156 Client Center Tracking 157 Signature Capture in a PDF 158 Signature Capture in a PDF 158 Signature Capture with Windows 8 & 10 158 Deliver PDF for Signature with Adobe Sign 159 Multiuser Permissions and Features 160 Standalone Multiusers (Disconnected) 160 Ture Multiuser Connections on Network or Server (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 162 Automatic Software Updates 163 ENTERPRISE Features (Enterprise Version) 164 Default Settings (Enterprise Version) 164 Default Settings (Enterprise Version) 165 Siste Order Process 165 </td <td>Receiving Products on aN ISSUED Purchase Order</td> <td>149</td>	Receiving Products on aN ISSUED Purchase Order	149
Use Inventory (Enterprise Feature or Optional in Pro) 151 Creating Professional Wire Labels with a Dymo Rhino Labeler 155 Sales Reports 155 Client Contact Report 155 Tax Table 155 Settings/Company Info Menu 155 Delivering a Great Proposal 156 NEW Client Center 156 Client Center Tracking 157 Signature Capture with Windows 8 & 10 158 Signature Capture with Windows 8 & 10 158 Delivering and Features 160 Standalone Multiusers (Disconnected) 160 Ture Multiuser Connections on Network or Server (Pro/Enterprise Feature) 161 One at a Time Sharing (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 162 Automatic Software Updates 163 ENTERPRISE Features (Enterprise Version) 164 Default Settings (Enterprise Version) 164 Default Settings (Enterprise Version) 164 Default Settings (Enterprise Feature) 165 Activate Notify of Recent Bid Update 165 Activate Notify of Recent Bid Update 166 <	INVENTORY MANAGEMENT OPTIONAL IN PRO, INCLUDED IN ENTERPRISE VERSION	151
Creating Professional Wire Labels with a Dymo Rhino Labeler		
Sales Reports 155 Client Contact Report 155 Tax Table 155 Settings/Company Info Menu 155 Delivering a Great Proposal 156 NEW Client Center 156 Client Center Tracking 157 Signature Capture with Windows 8 & 10. 158 Deliver PDF for Signature with Modows 8 & 10. 158 Deliver PDF for Signature with Adobe Sign. 159 Multiuser Permissions and Features 160 Standalone Multiusers (Disconnected) 160 True Multiuser Connections on Network or Server (Pro/Enterprise Feature) 161 One at a Time Sharing (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 163 ENTERPRISE Features (Enterprise Version) 164 Default Settings (Enterprise Version) 164 Default Settings (Enterprise Version) 164 Letterprise Adminstrator Settings 165 Asset Tracking 165 Asset Tracking 165 Asset Tracking 165 Asset Tracking 165 <tr< td=""><td></td><td></td></tr<>		
Client Contact Report. 155 Tax Table 155 Settings/Company Info Menu 155 Delivering a Great Proposal 156 NEW Client Center 156 Client Center Tracking 157 Signature Capture in a PDF 158 Signature Capture with Windows 8 & 10. 158 Deliver PDF for Signature with Adobe Sign. 159 Multiuser Permissions and Features 160 Standalone Multiusers (Disconnected) 160 True Multiuser Connections on Network or Server (Pro/Enterprise Feature) 161 One at Time Sharing (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 162 Automatic Software Updates 163 ENTERPRISE Features (Enterprise Version) 164 Default Settlings (Enterprise Version) 164 Default Settlings (Pro/Enterprise Feature) 165 Activate Notify of Recent Bid Update 166 Adhoc (Misc.) Products (Enterprise Feature) 165	5	
Tax Table 155 Settings/Company Info Menu 155 Delivering a Great Proposal 156 NEW Client Center 156 Client Center Tracking 157 Signature Capture in a PDF 158 Signature Capture with Windows 8 & 10 158 Deliver PDF for Signature with Adobe Sign 159 Multiuser Permissions and Features 160 Standalone Multiusers (Disconnected) 160 True Multiuser Connections on Network or Server (Pro/Enterprise Feature) 161 One at a Time Sharing (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 161 How to Bypass Multiuser Login (Pro/Enterprise Feature) 162 Automatic Software Updates 163 ENTERPRISE Features (Enterprise Version) 164 Default Settings (Enterprise Version) 164 Lenterprise Adminstrator Settings 165 Use Campus/Rooms 165 Attivate Notify of Recent Bid Update 166 Adhoc (Misc.) Products (Enterprise Feature) 166 Adhoc (Misc.) Products (Enterprise Feature) 166 Adhoc (Misc.) Products (Enterprise Feature) 166 <td>•</td> <td></td>	•	
Settings/Company Info Menu 155 Delivering a Great Proposal 156 NEW Client Center 156 Client Center Tracking 157 Signature Capture in a PDF 158 Signature Capture with Windows 8 & 10 158 Deliver PDF for Signature with Adobe Sign 159 Multiuser Permissions and Features 160 Standalone Multiusers (Disconnected) 160 True Multiuser Connections on Network or Server (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 161 How to Bypass Multiuser Login (Pro/Enterprise Feature) 162 Automatic Software Updates 163 ENTERPRISE Features (Enterprise Version) 164 Default Settings (Enterprise Version) 164 Enterprise Administrator Settings 165 Asset Tracking 165 Astive Notify of Recent Bid Update 166 Use a Step Order Process 166 Allocate and Transfer 166 Allocate and Transfer 166 Allocate and Transfer 166 Multiple Locations or Departme		
Delivering a Great Proposal 156 NEW Client Center 156 Client Center Tracking 157 Signature Capture in a PDF 158 Signature Capture with Windows 8 & 10. 158 Deliver PDF for Signature with Adobe Sign. 159 Multiuser Permissions and Features 160 Standalone Multiusers (Disconnected) 160 True Multiuser Connections on Network or Server (Pro/Enterprise Feature) 161 One at a Time Sharing (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 161 How to Bypass Multiuser Login (Pro/Enterprise Feature) 162 Automatic Software Updates 163 ENTERPRISE Features (Enterprise Version) 164 Default Settings (Enterprise Version) 164 Enterprise Adminstrator Settings 165 Asset Tracking 165 Enable Large Database Product Search 166 Allocate and Transfer 166 Allocate and Transfer 166 Advinc (Misc.) Products 168 Multiple Locations or Departments (Enterprise Feature) 166 Advioc (Misc.) Products 168		
NEW Client Center 156 Client Center Tracking 157 Signature Capture in a PDF 158 Signature Capture with Windows 8 & 10 158 Deliver PDF for Signature with Adobe Sign 159 Multiuser Permissions and Features 160 Standalone Multiusers (Disconnected) 160 True Multiuser Connections on Network or Server (Pro/Enterprise Feature) 161 One at a Time Sharing (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 162 Automatic Software Updates 163 ENTERPRISE Features (Enterprise Version) 164 Default Settings (Enterprise Version) 164 Enterprise Adminstrator Settings 165 Use Campus/Rooms 165 Asset Tracking 165 Enable Large Database Product Search 165 Aditorat Profeces 166 Use 3 Step Order Process 166 Allocate and Transfer 166 Adhoc Products 166 View Adhoc Products 166 View Adhoc Products 166 View Adhoc Products 166 View Adhoc Pro	Settings/Company Info Menu	155
Client Center Tracking 157 Signature Capture in a PDF 158 Signature Capture with Windows 8 & 10. 158 Deliver PDF for Signature with Adobe Sign 159 Multiuser Permissions and Features 160 Standalone Multiusers (Disconnected) 160 True Multiuser Connections on Network or Server (Pro/Enterprise Feature) 161 One at a Time Sharing (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 162 Automatic Software Updates 163 ENTERPRISE Features (Enterprise Version) 164 Default Settings (Enterprise Version) 164 Enterprise Adminstrator Settings 165 Asset Tracking 165 Enable Large Database Product Search 165 Activate Notify of Recent Bid Update 166 Use 3 Step Order Process 166 Allocate and Transfer 166 Adhoc Products (Enterprise Feature) 166 View Adhoc Products 168 Multiple Locations or Departments (Enterprise Feature) 166 Job Status and Automatic email Notifications – User Manager/Enterprise Settings 171 Job Status and Auto	Delivering a Great Proposal	156
Signature Capture in a PDF. 158 Signature Capture with Windows 8 & 10. 158 Deliver PDF for Signature with Adobe Sign 159 Multiuser Permissions and Features 160 Standalone Multiusers (Disconnected) 160 True Multiuser Connections on Network or Server (Pro/Enterprise Feature) 161 One at a Time Sharing (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 161 How to Bypass Multiuser Login (Pro/Enterprise Feature) 162 Automatic Software Updates 163 ENTERPRISE Features (Enterprise Version) 164 Default Settings (Enterprise Version) 164 Enterprise Adminstrator Settings 165 Asset Tracking 165 Activate Notify of Recent Bid Update 166 Use 3 Step Order Process 166 Allocate and Transfer 166 Allocate and Transfer 166 Adhoc (Misc.) Products (Enterprise Feature) 167 Job Status and Automatic email Notifications – User Manager/Enterprise Settings 172 Job Status and Automatic email Notifications – User Manager/Enterprise Settings 172 Setting up Automatic email Notification R		
Signature Capture with Windows & 10. 158 Deliver PDF for Signature with Adobe Sign. 159 Multiuser PDF for Signature with Adobe Sign. 160 Standalone Multiusers (Disconnected) 160 True Multiuser Connections on Network or Server (Pro/Enterprise Feature) 161 One at a Time Sharing (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 161 How to Bypass Multiuser Login (Pro/Enterprise Feature) 162 Automatic Software Updates 163 ENTERPRISE Features (Enterprise Version) 164 Default Settings (Enterprise Version) 164 Enterprise Adminstrator Settings. 165 Use Campus/Rooms 165 Activate Notify of Recent Bid Update 166 Use 3 Step Order Process. 166 Allocate and Transfer 166 Adhoc (Misc.) Products (Enterprise Feature) 166 View Adhoc Products 168 Multiple Locations or Departments (Enterprise Feature) 161 Job Status and Automatic email Notification Rules: 171 Job Status and Automatic email Notification Rules: 172 Manage Enterprise User Settings (Enterprise Version)	-	
Deliver PDF for Signature with Adobe Sign 159 Multiuser Permissions and Features 160 Standalone Multiusers (Disconnected) 160 True Multiuser Connections on Network or Server (Pro/Enterprise Feature) 161 One at a Time Sharing (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 161 How to Bypass Multiuser Login (Pro/Enterprise Feature) 162 Automatic Software Updates 163 ENTERPRISE Features (Enterprise Version) 164 Default Settings (Enterprise Version) 164 Enterprise Adminstrator Settings 165 Asset Tracking 165 Enable Large Database Product Search 165 Activate Notify of Recent Bid Update 166 Use Order Process 166 Adhoc (Misc.) Products (Enterprise Feature) 166 Adhoc Products 166 Multiple Locations or Departments (Enterprise Feature) 167 Job Status Setup – Default Settings/Enterprise (Enterprise Feature) 171 Job Status and Automatic email Notification Rules: 172 Manage Enterprise User Settings (Enterprise Version) 173		
Multiuser Permissions and Features 160 Standalone Multiusers (Disconnected) 160 True Multiuser Connections on Network or Server (Pro/Enterprise Feature) 161 One at a Time Sharing (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 161 How to Bypass Multiuser Login (Pro/Enterprise Feature) 162 Automatic Software Updates 163 ENTERPRISE Features (Enterprise Version) 164 Default Settings (Enterprise Version) 164 Enterprise Adminstrator Settings 165 Use Campus/Rooms 165 Asset Tracking 165 Activate Notify of Recent Bid Update 166 Use 3 Step Order Process 166 Allocate and Transfer 166 Adhoc (Misc.) Products (Enterprise Feature) 166 View Adhoc Products 168 Multiple Locations or Departments (Enterprise Feature) 169 Job Status and Automatic email Notifications – User Manager/Enterprise Settings 171 Job Status and Automatic email Notifications – User Manager/Enterprise Settings 172 Multiple Locations or Departments (Ente		
Standalone Multiusers (Disconnected) 160 True Multiuser Connections on Network or Server (Pro/Enterprise Feature) 161 One at a Time Sharing (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 161 How to Bypass Multiuser Login (Pro/Enterprise Feature) 162 Automatic Software Updates 163 ENTERPRISE Features (Enterprise Version) 164 Default Settings (Enterprise Version) 164 Enterprise Adminstrator Settings. 165 Use Campus/Rooms 165 Enable Large Database Product Search 165 Allocate and Transfer 166 Allocate and Transfer 166 Allocate and Transfer 166 View Adhoc Products (Enterprise Feature) 166 View Adhoc Products (Enterprise Feature) 166 View Adhoc Products 166 Multiple Locations or Departments (Enterprise Feature) 169 Job Status and Automatic email Notifications – User Manager/Enterprise Settings 172 Setting up Automatic email Notifications – User Manager/Enterprise Settings 172 Manage Enterprise User Settings (Enterprise Version) 173	Deliver PDF for Signature with Adobe Sign	159
True Multiuser Connections on Network or Server (Pro/Enterprise Feature) 161 One at a Time Sharing (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 161 How to Bypass Multiuser Login (Pro/Enterprise Feature) 162 Automatic Software Updates 163 ENTERPRISE Features (Enterprise Version) 164 Default Settings (Enterprise Version) 164 Enterprise Administrator Settings 165 Use Campus/Rooms 165 Asset Tracking 165 Enable Large Database Product Search 166 Use 3 Step Order Process 166 Allocate and Transfer 166 Allocate and Transfer 166 View Adhoc Products (Enterprise Feature) 168 Multiple Locations or Departments (Enterprise Feature) 171 Job Status and Automatic email Notifications – User Manager/Enterprise Settings 172 Setting up Automatic email Notification Rules: 172 Manage Enterprise User Settings (Enterprise Version) 173		
One at a Time Sharing (Pro/Enterprise Feature) 161 Multiuser Login (Pro/Enterprise Feature) 161 How to Bypass Multiuser Login (Pro/Enterprise Feature) 162 Automatic Software Updates 163 ENTERPRISE Features (Enterprise Version) 164 Default Settings (Enterprise Version) 164 Enterprise Administrator Settings 165 Use Campus/Rooms 165 Asset Tracking 165 Enable Large Database Product Search 165 Activate Notify of Recent Bid Update 166 Use 3 Step Order Process 166 Alhoc (Misc.) Products (Enterprise Feature) 166 Nultiple Locations or Departments (Enterprise Feature) 169 Job Status Setup - Default Settings/Enterprise (Enterprise Feature) 171 Job Status and Automatic email Notifications – User Manager/Enterprise Settings 172 Setting up Automatic email Notification Rules: 172 Manage Enterprise User Settings (Enterprise Version) 173		
Multiuser Login (Pro/Enterprise Feature) 161 How to Bypass Multiuser Login (Pro/Enterprise Feature) 162 Automatic Software Updates 163 ENTERPRISE Features (Enterprise Version) 164 Default Settings (Enterprise Version) 164 Enterprise Administrator Settings 165 Use Campus/Rooms 165 Asset Tracking 165 Entarge Database Product Search 165 Ativate Notify of Recent Bid Update 166 Use 3 Step Order Process 166 Allocate and Transfer 166 Adhoc (Misc.) Products (Enterprise Feature) 166 View Adhoc Products 166 Multiple Locations or Departments (Enterprise Feature) 169 Job Status Setup – Default Settings/Enterprise (Enterprise Feature) 171 Job Status and Automatic email Notifications – User Manager/Enterprise Settings 172 Setting up Automatic email Notification Rules: 172 Manage Enterprise User Settings (Enterprise Version) 173		
How to Bypass Multiuser Login (Pro/Enterprise Feature)162Automatic Software Updates163ENTERPRISE Features (Enterprise Version)164Default Settings (Enterprise Version)164Enterprise Adminstrator Settings165Use Campus/Rooms165Asset Tracking165Enterprise Database Product Search165Activate Notify of Recent Bid Update166Use 3 Step Order Process166Allocate and Transfer166Adhoc (Misc.) Products (Enterprise Feature)166View Adhoc Products168Multiple Locations or Departments (Enterprise Feature)169Job Status Setup - Default Settings/Enterprise (Enterprise Feature)171Job Status and Automatic email Notification Rules:172Manage Enterprise User Settings (Enterprise Version)173		
Automatic Software Updates 163 ENTERPRISE Features (Enterprise Version) 164 Default Settings (Enterprise Version) 164 Enterprise Adminstrator Settings 165 Use Campus/Rooms 165 Asset Tracking 165 Enable Large Database Product Search 165 Activate Notify of Recent Bid Update 166 Use 3 Step Order Process 166 Allocate and Transfer 166 Adhoc (Misc.) Products (Enterprise Feature) 166 View Adhoc Products 168 Multiple Locations or Departments (Enterprise Feature) 169 Job Status Setup – Default Settings/Enterprise (Enterprise Feature) 171 Job Status and Automatic email Notifications – User Manager/Enterprise Settings 172 Setting up Automatic email Notification Rules: 173 Manage Enterprise User Settings (Enterprise Version) 173	One at a Time Sharing (Pro/Enterprise Feature)	
ENTERPRISE Features (Enterprise Version) 164 Default Settings (Enterprise Version) 164 Enterprise Adminstrator Settings 165 Use Campus/Rooms 165 Asset Tracking 165 Enable Large Database Product Search 165 Activate Notify of Recent Bid Update 166 Use 3 Step Order Process 166 Allocate and Transfer 166 Adhoc (Misc.) Products (Enterprise Feature) 166 View Adhoc Products 168 Multiple Locations or Departments (Enterprise Feature) 169 Job Status Setup – Default Settings/Enterprise (Enterprise Feature) 171 Job Status and Automatic email Notifications – User Manager/Enterprise Settings 172 Setting up Automatic email Notification Rules: 173 Manage Enterprise User Settings (Enterprise Version) 173	One at a Time Sharing (Pro/Enterprise Feature) Multiuser Login (Pro/Enterprise Feature)	161
Default Settings (Enterprise Version)164Enterprise Adminstrator Settings165Use Campus/Rooms165Asset Tracking165Enable Large Database Product Search165Activate Notify of Recent Bid Update166Use 3 Step Order Process166Allocate and Transfer166Adhoc (Misc.) Products (Enterprise Feature)166View Adhoc Products168Multiple Locations or Departments (Enterprise Feature)169Job Status Setup - Default Settings/Enterprise (Enterprise Feature)171Job Status and Automatic email Notifications - User Manager/Enterprise Settings172Setting up Automatic email Notification Rules:172Manage Enterprise User Settings (Enterprise Version)173	One at a Time Sharing (Pro/Enterprise Feature) Multiuser Login (Pro/Enterprise Feature) How to Bypass Multiuser Login (Pro/Enterprise Feature)	161 162
Enterprise Adminstrator Settings.165Use Campus/Rooms.165Asset Tracking.165Enable Large Database Product Search165Activate Notify of Recent Bid Update166Use 3 Step Order Process.166Allocate and Transfer166Adhoc (Misc.) Products (Enterprise Feature).166View Adhoc Products168Multiple Locations or Departments (Enterprise Feature)169Job Status Setup – Default Settings/Enterprise (Enterprise Feature)171Job Status and Automatic email Notifications – User Manager/Enterprise Settings172Setting up Automatic email Notification Rules:173Manage Enterprise User Settings (Enterprise Version)173	One at a Time Sharing (Pro/Enterprise Feature) Multiuser Login (Pro/Enterprise Feature) How to Bypass Multiuser Login (Pro/Enterprise Feature)	161 162
Use Campus/Rooms165Asset Tracking165Enable Large Database Product Search165Activate Notify of Recent Bid Update166Use 3 Step Order Process166Allocate and Transfer166Adhoc (Misc.) Products (Enterprise Feature)166View Adhoc Products168Multiple Locations or Departments (Enterprise Feature)169Job Status Setup – Default Settings/Enterprise (Enterprise Feature)171Job Status and Automatic email Notifications – User Manager/Enterprise Settings172Setting up Automatic email Notification Rules:173Manage Enterprise User Settings (Enterprise Version)173	One at a Time Sharing (Pro/Enterprise Feature) Multiuser Login (Pro/Enterprise Feature) How to Bypass Multiuser Login (Pro/Enterprise Feature) Automatic Software Updates	
Asset Tracking.165Enable Large Database Product Search.165Activate Notify of Recent Bid Update.166Use 3 Step Order Process.166Allocate and Transfer.166Adhoc (Misc.) Products (Enterprise Feature).166View Adhoc Products.168Multiple Locations or Departments (Enterprise Feature).169Job Status Setup – Default Settings/Enterprise (Enterprise Feature).171Job Status and Automatic email Notifications – User Manager/Enterprise Settings.172Setting up Automatic email Notification Rules:.173Manage Enterprise User Settings (Enterprise Version).173	One at a Time Sharing (Pro/Enterprise Feature) Multiuser Login (Pro/Enterprise Feature) How to Bypass Multiuser Login (Pro/Enterprise Feature) Automatic Software Updates	
Enable Large Database Product Search.165Activate Notify of Recent Bid Update.166Use 3 Step Order Process.166Allocate and Transfer.166Adhoc (Misc.) Products (Enterprise Feature).166View Adhoc Products.168Multiple Locations or Departments (Enterprise Feature).169Job Status Setup – Default Settings/Enterprise (Enterprise Feature).171Job Status and Automatic email Notifications – User Manager/Enterprise Settings.172Setting up Automatic email Notification Rules:.173Manage Enterprise User Settings (Enterprise Version).173	One at a Time Sharing (Pro/Enterprise Feature) Multiuser Login (Pro/Enterprise Feature) How to Bypass Multiuser Login (Pro/Enterprise Feature) Automatic Software Updates ENTERPRISE Features (Enterprise Version) Default Settings (Enterprise Version) Enterprise Adminstrator Settings.	
Activate Notify of Recent Bid Update 166 Use 3 Step Order Process. 166 Allocate and Transfer 166 Adhoc (Misc.) Products (Enterprise Feature) 166 View Adhoc Products 168 Multiple Locations or Departments (Enterprise Feature) 169 Job Status Setup – Default Settings/Enterprise (Enterprise Feature) 171 Job Status and Automatic email Notifications – User Manager/Enterprise Settings 172 Setting up Automatic email Notification Rules: 172 Manage Enterprise User Settings (Enterprise Version) 173	One at a Time Sharing (Pro/Enterprise Feature) Multiuser Login (Pro/Enterprise Feature) How to Bypass Multiuser Login (Pro/Enterprise Feature) Automatic Software Updates ENTERPRISE Features (Enterprise Version) Default Settings (Enterprise Version) Enterprise Adminstrator Settings. Use Campus/Rooms	
Use 3 Step Order Process. 166 Allocate and Transfer 166 Adhoc (Misc.) Products (Enterprise Feature) 166 View Adhoc Products 168 Multiple Locations or Departments (Enterprise Feature) 169 Job Status Setup – Default Settings/Enterprise (Enterprise Feature) 171 Job Status and Automatic email Notifications – User Manager/Enterprise Settings 172 Setting up Automatic email Notification Rules: 172 Manage Enterprise User Settings (Enterprise Version) 173	One at a Time Sharing (Pro/Enterprise Feature) Multiuser Login (Pro/Enterprise Feature) How to Bypass Multiuser Login (Pro/Enterprise Feature) Automatic Software Updates. ENTERPRISE Features (Enterprise Version) Default Settings (Enterprise Version). Enterprise Adminstrator Settings. Use Campus/Rooms Asset Tracking	
Allocate and Transfer 166 Adhoc (Misc.) Products (Enterprise Feature) 166 View Adhoc Products 168 Multiple Locations or Departments (Enterprise Feature) 169 Job Status Setup – Default Settings/Enterprise (Enterprise Feature) 171 Job Status and Automatic email Notifications – User Manager/Enterprise Settings 172 Setting up Automatic email Notification Rules: 172 Manage Enterprise User Settings (Enterprise Version) 173	One at a Time Sharing (Pro/Enterprise Feature) Multiuser Login (Pro/Enterprise Feature) How to Bypass Multiuser Login (Pro/Enterprise Feature) Automatic Software Updates	
Adhoc (Misc.) Products (Enterprise Feature) 166 View Adhoc Products 168 Multiple Locations or Departments (Enterprise Feature) 169 Job Status Setup – Default Settings/Enterprise (Enterprise Feature) 171 Job Status and Automatic email Notifications – User Manager/Enterprise Settings 172 Setting up Automatic email Notification Rules: 172 Manage Enterprise User Settings (Enterprise Version) 173	One at a Time Sharing (Pro/Enterprise Feature) Multiuser Login (Pro/Enterprise Feature) How to Bypass Multiuser Login (Pro/Enterprise Feature) Automatic Software Updates ENTERPRISE Features (Enterprise Version) Default Settings (Enterprise Version) Enterprise Adminstrator Settings. Use Campus/Rooms Asset Tracking Enable Large Database Product Search Activate Notify of Recent Bid Update	
View Adhoc Products 168 Multiple Locations or Departments (Enterprise Feature) 169 Job Status Setup – Default Settings/Enterprise (Enterprise Feature) 171 Job Status and Automatic email Notifications – User Manager/Enterprise Settings 172 Setting up Automatic email Notification Rules: 172 Manage Enterprise User Settings (Enterprise Version) 173	One at a Time Sharing (Pro/Enterprise Feature) Multiuser Login (Pro/Enterprise Feature) How to Bypass Multiuser Login (Pro/Enterprise Feature) Automatic Software Updates ENTERPRISE Features (Enterprise Version) Default Settings (Enterprise Version) Enterprise Adminstrator Settings. Use Campus/Rooms Asset Tracking Enable Large Database Product Search Activate Notify of Recent Bid Update Use 3 Step Order Process.	
Multiple Locations or Departments (Enterprise Feature)	One at a Time Sharing (Pro/Enterprise Feature) Multiuser Login (Pro/Enterprise Feature) How to Bypass Multiuser Login (Pro/Enterprise Feature) Automatic Software Updates ENTERPRISE Features (Enterprise Version) Default Settings (Enterprise Version) Enterprise Adminstrator Settings. Use Campus/Rooms Asset Tracking Enable Large Database Product Search Activate Notify of Recent Bid Update Use 3 Step Order Process. Allocate and Transfer.	
Job Status Setup – Default Settings/Enterprise (Enterprise Feature)171Job Status and Automatic email Notifications – User Manager/Enterprise Settings172Setting up Automatic email Notification Rules:172Manage Enterprise User Settings (Enterprise Version)173	One at a Time Sharing (Pro/Enterprise Feature) Multiuser Login (Pro/Enterprise Feature) How to Bypass Multiuser Login (Pro/Enterprise Feature) Automatic Software Updates ENTERPRISE Features (Enterprise Version) Default Settings (Enterprise Version) Enterprise Adminstrator Settings. Use Campus/Rooms. Asset Tracking Enable Large Database Product Search Activate Notify of Recent Bid Update Use 3 Step Order Process. Allocate and Transfer. Adhoc (Misc.) Products (Enterprise Feature).	
Job Status and Automatic email Notifications – User Manager/Enterprise Settings	One at a Time Sharing (Pro/Enterprise Feature) Multiuser Login (Pro/Enterprise Feature) How to Bypass Multiuser Login (Pro/Enterprise Feature) Automatic Software Updates. ENTERPRISE Features (Enterprise Version) Default Settings (Enterprise Version) Enterprise Adminstrator Settings Use Campus/Rooms Asset Tracking Enable Large Database Product Search Activate Notify of Recent Bid Update Use 3 Step Order Process. Allocate and Transfer Adhoc (Misc.) Products (Enterprise Feature). View Adhoc Products	
Setting up Automatic email Notification Rules:	One at a Time Sharing (Pro/Enterprise Feature) Multiuser Login (Pro/Enterprise Feature) How to Bypass Multiuser Login (Pro/Enterprise Feature) Automatic Software Updates. ENTERPRISE Features (Enterprise Version) Default Settings (Enterprise Version). Enterprise Adminstrator Settings. Use Campus/Rooms. Asset Tracking Enable Large Database Product Search Activate Notify of Recent Bid Update. Use 3 Step Order Process. Allocate and Transfer. Adhoc (Misc.) Products (Enterprise Feature). View Adhoc Products. Multiple Locations or Departments (Enterprise Feature).	161 162 163 164 164 164 165 165 165 165 165 166 166 166 166 166
Manage Enterprise User Settings (Enterprise Version)173	One at a Time Sharing (Pro/Enterprise Feature) Multiuser Login (Pro/Enterprise Feature) How to Bypass Multiuser Login (Pro/Enterprise Feature) Automatic Software Updates ENTERPRISE Features (Enterprise Version) Default Settings (Enterprise Version) Enterprise Adminstrator Settings Use Campus/Rooms Asset Tracking Enable Large Database Product Search Activate Notify of Recent Bid Update Use 3 Step Order Process Allocate and Transfer Adhoc (Misc.) Products (Enterprise Feature) View Adhoc Products Multiple Locations or Departments (Enterprise Feature) Job Status Setup – Default Settings/Enterprise (Enterprise Feature)	161 162 163 164 164 164 165 165 165 165 165 165 166 166 166 166
	One at a Time Sharing (Pro/Enterprise Feature)	161 162 163 164 164 164 165 165 165 165 165 166 166 166 166 166
	One at a Time Sharing (Pro/Enterprise Feature) Multiuser Login (Pro/Enterprise Feature) How to Bypass Multiuser Login (Pro/Enterprise Feature) Automatic Software Updates. ENTERPRISE Features (Enterprise Version) Default Settings (Enterprise Version) Enterprise Adminstrator Settings. Use Campus/Rooms Asset Tracking. Enable Large Database Product Search Activate Notify of Recent Bid Update . Use 3 Step Order Process. Allocate and Transfer Adhoc (Misc.) Products (Enterprise Feature) View Adhoc Products. Multiple Locations or Departments (Enterprise Feature) Job Status Setup – Default Settings/Enterprise (Enterprise Feature) Job Status and Automatic email Notifications – User Manager/Enterprise Settings	161 162 163 164 164 164 165 165 165 165 165 166 166 166 166 168 169 171 172

Job Status (Enterprise Ve	rsion)		173
	•		
•	•	(Enterprise Feature)	
-	-		
	•		
-			
Central Purchasing (Enterprise	Version)		
Purchasing Screen			
Purchase Order Shipping	Options		181
CENTRAL Purchasing Workf	'ow		187
-			
_			
Trackina Numhers (Enternri	se)		185
	•		
Tracking Assets, Input/Outp	ut, Wire Numbers (Enterprise feature	е)	
Assianing Asset Requiremen	ts to Products (Enternrise feature)		188
Campus Room Selections / F	ROOM LISTS (Enterprise feature)		
Multiple Bids CAN be Printer	d together and Summarized in a Clier	nt Master Bid (Enterprise feature)	
Data Entry and Search Asse	: Management (Enterprise feature)		
Job Log - Management Repo	orting (Enterprise feature)		
BidMagic Database and Mo	ving to another PC		10/
-	-	rive replacement	
		es in Windows Control Panel	
TECH Calendar (Pro/Enterprise	Option)		196
Project Manager Tabs (Gree	n)		
Work Orders Tab			
Project Menu			196
Send BidMagic Job to Cal	endar		
8			
BidMagic User Guide	© 2020 BidMagic Corp.	All rights reserved	Page 8

Calendar Settings			
•			
Mobile Users			
Reload Data from Calenda	r		198
1			
8			
-	es to Clients		
•			
	ure in Default Settings)		
Sending Jobs OR SERVICE TICKET	S to the Calendar		200
TECH Calendar - Schedule & Disp	atch Center		201
			201
	onth Calendar Views		
Scheduling hours sold & Crea	ting Work Orders		202
Copy, Paste, Move, Return to	Unassigned Task List		202
Work Order & Service Ticket	Assignments		204
Tips for Assigning Labor to	Work Orders and Service Tickets:		204
	to a User		
Assigning One Task to Mul	tiple Users or Multiple Days		205
Using Copy/Paste for Multida	y or Multiuser assignments		206
	who have clocked in		
	ing a Calendar Event		
	urs than Estimated (Sold)		
	y on the Calendar		
View and Print Work Orde	rs and Schedules		209
Automatic Rescheduling			210
Automatic Clockout			210
Timeline (Schedule Overview)			211
Progress Monitor (Compares	Hours Sold, Completed and Man Ho	ours)	212
Work Order Screen Tracks Inc	lividual Work By Job and Tech		212
Project Manager (Tracks Combin	ed Results from All Techs)		213
Tracking Completed Hours in	Profit Reports		214
	Calendar:		
•			
_	Devices		
	utton to Select an Appointment, Qu	-	
0			
-	© 2020 BidMagic Corp.		

Start and Stop Button New Mobile QuickTask Menu Navigation Visio Interface (Optional) Open The Drawing(s) for a Bid: Visio Tools Menu and Icons: Set Page Size and Scale for Drawings: Bids, Drawings and Shapes: Viewing Favorite Stencils (Groups of Shapes) Zooming, Scrolling and Panning in Visio Drawings: Creating Rack Drawings with Middle Atlantic Visio Blocks 	220
Menu Navigation	221
Visio Interface (Optional) Open The Drawing(s) for a Bid: Visio Tools Menu and Icons: Set Page Size and Scale for Drawings: Bids, Drawings and Shapes: Viewing Favorite Stencils (Groups of Shapes) Zooming, Scrolling and Panning in Visio Drawings: Creating Rack Drawings with Middle Atlantic Visio Blocks Importing a Floor plan or Drawing Image:	221
Open The Drawing(s) for a Bid: Visio Tools Menu and Icons: Set Page Size and Scale for Drawings: Bids, Drawings and Shapes: Viewing Favorite Stencils (Groups of Shapes). Zooming, Scrolling and Panning in Visio Drawings: Creating Rack Drawings with Middle Atlantic Visio Blocks Importing a Floor plan or Drawing Image:	222
Visio Tools Menu and Icons: Set Page Size and Scale for Drawings: Bids, Drawings and Shapes: Viewing Favorite Stencils (Groups of Shapes) Zooming, Scrolling and Panning in Visio Drawings: Creating Rack Drawings with Middle Atlantic Visio Blocks Importing a Floor plan or Drawing Image:	23
Set Page Size and Scale for Drawings: Bids, Drawings and Shapes: Viewing Favorite Stencils (Groups of Shapes). Zooming, Scrolling and Panning in Visio Drawings: Creating Rack Drawings with Middle Atlantic Visio Blocks Importing a Floor plan or Drawing Image:	223
Bids, Drawings and Shapes: Viewing Favorite Stencils (Groups of Shapes) Zooming, Scrolling and Panning in Visio Drawings: Creating Rack Drawings with Middle Atlantic Visio Blocks Importing a Floor plan or Drawing Image:	223
Viewing Favorite Stencils (Groups of Shapes) Zooming, Scrolling and Panning in Visio Drawings: Creating Rack Drawings with Middle Atlantic Visio Blocks Importing a Floor plan or Drawing Image:	223
Zooming, Scrolling and Panning in Visio Drawings: Creating Rack Drawings with Middle Atlantic Visio Blocks Importing a Floor plan or Drawing Image:	225
Creating Rack Drawings with Middle Atlantic Visio Blocks Importing a Floor plan or Drawing Image:	226
Importing a Floor plan or Drawing Image:	226
	227
	227
Set Image as Background:	228
Add, Delete, Rename and Reorder Drawing Pages:	228
Assigning Visio Shapes to Products in BidMagic Products Manager:	229
Dynamic Visio Shape Scaling based on Height, Width and Depth:	229
Adding Wiring Connections:	230
Adding Product Brochures, Cutsheets and Graphics:	231
Adding and Using Layers in Drawings:	232
Accessing Visio Tools:	232
Helpful Visio Keyboard Shortcuts	233
BidMagic Keyboard Shortcuts	234
Right click operations in Tables:	234
Printing Wire Labels with Dymo Rhino Labelers	235
Troubleshooting Problems:	236
FAQ's	238

NEW IN THIS VERSION: 10.0

General Features:

Special features added for optional Cloud Hosting! Improved connection to MS Office and Office 365, compatibility with 64 bit Office. Improved Client Center delivers proposals online with your special delivery page. Receive email notifications when client reviews or approves your proposals and more. MEGASPECS improvements include search by model, manufacturer and general search. Older discontinued products are not displayed in MEGASPECS. Cover Page now includes the user's name, phone and email instead of generic company info. Bid screen allows you to show or hide line item prices and price summary section. Product images can now be loaded easier via drag/drop or copy/paste Autolink packages can be copy/pasted to multiple products with a single click. Choice to add to or replace existing package. Improved QuickBooks integration with option to send description of work to Invoice or Estimate. Option to send Sales Rep to QuickBooks Option to send Breakdown of all Labor Phases to QuickBooks Calculate Surtax and include in client bids and send to QuickBooks. When changing cost for an existing product, choose to adjust markup/margin or sell price. Improvements to contact information sent to Purchase Orders, Packing Lists and QuickBooks. Updated Word templates and compatibility with docx format. Overall Bug fixes and performance improvements for a robust experience. Service Tickets can be printed with Client Bid templates. New and improved Templates

Tech Calendar Enhancements include:

Enhanced operation with updated Apple and Android mobile apps.

Option for Fast Track scheduling to combine all Labor phases

Work Order Tab move to Top level and improvements to loading speed.

Ability to Mark Projects done and Archive Projects.

Improved Timesheet Layout and Calculations.

Work Orders display signature capture and photo capture.

Improved sending images and signature captures from mobile devices.

Improved Automated Text Messages to clients.

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

INSTALLATION QUICKSTART - STEPS TO INSTALL & DEPLOY

BidMagic software is the easiest to setup and deploy. Download and install the latest version from our tech support page. 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. For your first installation, 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. If you need to install on additional PC's DO NOT use this method! (See notes below)
- 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 10 with 4 G minimum. Intel i3 or faster processor with 8G minimum recommended. Windows XP is not supported. Word 2010 or newer for printing reports and for customizing report templates. Excel 2010 or newer 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 (32 bit only) 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. Check out our cloud hosting option.

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.

Register BidMagic	
Customer Information	
Please provide the follo	wing required information then click Send.
PC Hardware ID	F29A76B4*S1ZWNXAG803957
PC MAC Address	4C3488BFD895
First Name	Bob
Last Name	Walker
Company Name	BidMagic
Telephone #	(303) 555-1212
Email Address	sales@bidmagiom
Confirm Email Address	sales@bidmagic.
Comments	
	Fill in all info to
	Register your
	Software
softwarequires a	an annual renewal fee every January, or it will
	This software may send error reports to BidMagic or support purposes only.
	ction is required for registration. Your privacy is do not share your information with any third-party.
More 🛛 Abou	t Cancel Send

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 Mac address and PC Hardware ID into an email and send

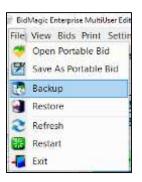
it to <u>register@bidmagic.com</u> Our registration team will activate your PC via the web. (usually in 1 business day or less) You will receive an email confirming that you have successfully registered. From time to time, your PC will check to verify your registration. If prompted, please connect to 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 Mac address or 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.

KEEP SAFE BIDMAGIC OFFSITE BACKUPS!!

BidMagic stores all data in a SQL Server Database. Please make regular backups of your database and store them offsite or on a separate safe drive. These backups are very valuable if you want to move to a new PC or have problems with malicious software, hard drive failure or even the loss of a laptop.



To create a backup, click File/Backup and save to the default location. Then copy the backup file to Google Drive, OneDrive, DropBox or save to another PC. USB drives can also be used. The backup file will be saved in this format: Backup_20200519182351.bak

The numbers 20200519 above are a reference to the date the backup was created.

Please contact tech support if you need to restore your backup.

€ Save As ← = - ↑ ♥ + Drapbos +	 ✓ δ Search Dropbic 	× م
Grganize + New Jolder		II • 0
Command Libraries Command Libraries Command Libraries Command Libraries Command Libraries Command Libraries	Name Save Backup to Dropbox, One Drive, GDrive or another offsite Drive BitMagicUserGuide2019 Acco BitMagicUserGuide2019 Acco BitMagicUserGuide2019 Acco BitMagicUserGuide2019 Acco	Date modified 5/19/2020 3/38 PM 5/19/2020 13/35 AA 5/4/2020 13/35 AA 5/4/2020 13/37 PM 5/11/2020 13/36 AA 5/5/2019 5/2019 PM 5/5/2019 7/17 PM 5/5/2019 3/55 PM 3/5/2019 3/55 PM 3/5/2019 3/55 PM 3/5/2019 3/55 PM
File name: Backup_202005 Save at type	19170740.bak	

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!

HOSTING BIDMAGIC IN THE CLOUD (OPTIONAL)

This new option is a great solution for people on the go or for multi-users who do not want to purchase and maintain servers and a complex IT environment. Hosting provides access to BidMagic from any PC or Mac via a simple internet connection, with zero installation on your PC's. This is much more elegant than connecting via remote desktop or terminal services. Ask sales about our low cost pricing.

Hosting includes a trial version of Microsoft Office 365 which is included for previewing and printing reports. Users must purchase or provide their own credentials to active Office 365. Users can also provide their own copy of QuickBooks desktop version to be added to the hosted environment for an additional fee.

To import products into a Cloud installation of BidMagic, users have access to their local drive for imports. See Importing Products CSV for more info.

HOW TO INSTALL BIDMAGIC ON MULTIPLE PC'S

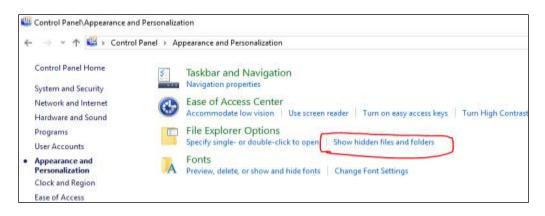
DO NOT USE THE DOWNLOAD INSTALLER FOR ADDITIONAL PC'S:

It will take too much time and will add SQL that you do not need.

On the First PC, open Windows File Explorer and Locate

C:\Program Files (x86) BidMagic. Copy the entire BidMagic folder to a USB drive.

Then locate C:\ProgramData/BidMagic. Note: If you do not see the Program Data, folder, open control panel, click Appearances and Personalization. Then under File Explorer options, click on Show hidden Folders.



Reopen File Explorer and you should now see the Program Data Folder. Copy this entire ProgramData\BidMagic folder to your USB Drive.

Eject the USB Drive and move it to the New PC. Paste each BidMagic folder to the exact same folder where it was on the first PC. (They are each named BidMagic, but you can tell them apart because the folder from Program Files (x86) has many more files in it.) Be sure to copy both folders.

	N	
Adobe Media Player Akamai	BidMagic Properties	×
AMD	General Sharing Security Previous Versions Gustomas	
AMD APP	Object name C. VProgram Files (x86)/BidMagic	
AMD AVT		
ATI Technologies	Group or user names:	- 12
Audacity	III Administration (Vostro450-PC: Administration)	*
BidMage	超高Users (Votro 4ED-PC1/Users) 調査 Trusted Installer	
BM_Registeren		4
Brother	(_
Brownie	To change permissions, click Edit, Edit	
Canon	Permanions for ALL APPLICATION PACKAGES Allow Deny	
Citrix	Falcontrol 🗸	A.
Common Files	Modify	
ControlCenter4	Read & execute	
Del	List folder contents 🗸	
Google	Read	
InstallShield Installation	Write	4
Intel	For special permissions or advanced settings. Advanced click Advanced	
Internet Explorer		
Intuit		

On your new PC, Inside C;\Program Files (x86)\BidMagic right click on BidMagic.exe – application and select send to Desktop shortcut. Then navigate to the C:\Program Data\BidMagic folder and right click on it to make sure it is not read only and that users and rusted installers have full rights. Click on edit button to add rights.

Now, Right click Program Files (x86) BidMagic folder, select properties. Make sure Read Only is not selected. If so, uncheck that and apply. Then click on the security tab and make sure that Users and Trusted Installers have full right to the folder.

Congratulations, you are now done. Click on the BidMagic desktop shortcut to launch it. Repeat this process for additional PC's. (Register each PC to activate your features)

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.

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 <u>support@bidmagic.com</u> or search our Knowledge Base at <u>http://knowledgebase.bidmagic.com/kb/root.aspx</u> Tech support does not provide training. Refer to this guide, watch the video tutorials or checkout tips at <u>https://bidmagic.com/tech-support/</u>

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.

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.

	DMAC	
Version 8.5.0.3)B Version 8.5.0.3	55 	vailable 8.5.0.3
lidMagic is a registered Tra lidMagic 8.5.0.3 #0 loctive Features:	ademark of BidMagic -	a Colorado corporation. © 20 admin
Edition:	ENTERPRISE	
Multi-user:	YES	
Product Library:	YES	
QuickBooks Interface:	YES	
QuickBooks Online:	NO	
Project Manager (CRM):	YES	
Visio Designer:	YES	
Advanced Features	YES	
Inventory	YES	
his software requires annu he PC Hardware ID belov 142A2D9D*9VMY8X	v is registered for use u	

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.

BIDMAGIC FEATURES	STANDARD	PRO	ENTERPRISE
MultiUser Features & Permissions		4	Advanced
Organize by Room & Systems (2 levels)		4	4
Price Level Adjustments & Optional Items		4	4
Room Descriptions/Scope of Work		4	4
Proposal Templates	5	10	10
Labor Phases	3	8	8
Choice of 3 Cover Pages		4	4
Contact Manager w/ Outlook connection		4	4
Sales Pipeline Tracking and Monthly Graphs		4	4
Central Purchasing Screen			4
User Assignable PO's & Job Numbers			4
Asset Tracking (20 fields per product)			4
Multiple Locations/Departments/Inventories			4
Job Status Tracking w/ email Notifications			4
Management Reports from User Logs			4
Inventory Control and Reports		option	4
Project Calendar		option	option
QuickBooks Interface	option	option	option
Visio Interface	option	option	option
Product Library/MEGA SPECS & Web Grabber	option	option	option

Standard Version includes all Core Features

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.

File View Bids Print		and the local little	QuickBo	oks Online Pro	1.00	o Tutorials Register User Guide	Help en 🔛 New Serv	ice
Bid Contacte Dest	board Products Visio P	urchase On	teen F	^o raject Manager	Calendar) elm	e Work Orders		
Client: 80	b Jones Buildans Tom Bradley		Rooms	Audio System		- COPY.	Move & View Room	n Al
Bid	av audio room loscy price		Model	9	Search My Produ	antitu -	Move # View All	Ŷ
Search by Calegory	JE HOOM	sverani	atr		MODEL	NETION	SELLPRICE	TOTALPR
I 7icce	Power Search					Click Icon to		
 Accessories Audio 	Audio System	VID	3.00	ee Digital Pr	ojection HTS	perform action	\$9,990.00	\$29,9
Carrieras & Optica El Interconnecto	Audio System	AUD	2.00	ea BáK	AVR507		\$1,996.00	\$3.9
E Keypada E Labor E E E	M Audio System	AUD	4.00	ea Panamax	MAX500	Surge Protector	\$120.00	\$4

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.

New Lead	Client 🔂 Bid Settings 🌘		Preview 💋 Job se Orders Project Name		New Bi	a 🔓 Dup	licate Bid	Touch	iscreen 😱 New Servi
Gent	Thomas Newman	Room	Breakfast Room			More R	Vew Room	[16]	
Bd	Awarane Theater fad	Model	Sea	nch My Predacto	+ DELS	TE More 8	Ven Al	Ψ.	
Bearch by Calegory	U ROOM	0127304	GTY MODEL	DESCRIPTION	-	SELLPRICE	TOTALPRICE	tio the	TOTAL LER. UNIT
FAVORITES	Finite Room Horse Theatre	VID	1.00 HTS	DLF Video Projector		\$9,990.00	39,990.00	Contract of the local distribution of the lo	5552.50 an
Accessures	Eamly Room Home Theatre	AUD	1.00 AVEB07	7.1 Surround Processor			\$2,995.00		\$212.50 00
Auto Decivorios	Eamily Room Home Theatre	AUD.	4.00 TR700	Ceiling Speakers	Drag H	Headers to	1,556.00	2 5	3425.00 pr
Coroumer Bectronice	Eamls Room Home Theats	AUD	1.00 AXS	Equipment Rack System	Resize	and Move	\$329.00	2 5	S265.00 mm
Interconnecte Keypeds	Eamily Room Hume Theatre	CTL	1.00 Intel	Intellicontrol System			1,199.00	B	51,082.50 en
Labor	Guest Bedroom 1	VID	1.00 TH-42P	42° Pleana HDTV	-	\$1,799.00	51,799.00	Ø	5255.00 as
Hounts	Guest Bedroom 1	VID	1.00 MTRUB	Large Low Profile Flat Panel		\$179,00	\$178.00	F2 F	50.00 ee
Rack	Euest Bedroom 1	VID	1.08 TVO	TV mullet white	0	\$24.00	\$24.00		8108.25 ee

BidMagic Enterpri	ise MultiUser Edition -v5	5.0.3					
File View Bids	s Print Settings Tr	emplates Import/Exp	ort QuickBo	oks Online Products Project Video Tutorials	Register User Gu	ide Help	
New Lead	d 🚠 Client 🔞	👌 Bid Settings 🏾 🌑	Rooms	Preview ᢧ Job Folder 🏂 Job Fold	er 📑 Refresh		
Bid Contacte	Dashboard Prode	ucts Visio Purches	ing Purchas	e Orders Project Manager Calendar Time	line		
Add Name	Roduct Manager	1					
NCIOEL	MPG NUMBER	MFG NAME	UNIT	DESCRIPTION	FEATURES	SUPPLIER	BUY QTY
Power Search	111						
12345	12345	12345	Ĥ,	lending space test			1
10	Sig3471606	Signature	tt.	Speaker cable 4 conductor	High quality spe_	Capitol	500
16	1104	1	ee	Quad PIR motion detector	Alternate Polarit.	Honeywell	1
4 Clic	k to Select Pro	duct	60	RCA 1 Meter cable	High quality ster.	Capitol	1
470.000				Crysu Crysu CD TV	SOYO's flat-pan.	TOTION OF	
5828	5828	Honeywell	68	1004	wires to run_	Honeywell	1
600-1040	600-1040	GE Security	60	Cor Right Click to Open Product	mmercial Sec.	Capitol	1
60-746-01	60-746-01	GE Security	60	Superbus 2000 CCD Aphanumene Touchpad	Cur 2-line, 16-ch.	Capitol	1
AVR507	AVR507	B&K	ea	7.1 Surround Processor	High end AV sur	B&K	1
AVR707	AVR707BK	BaK	60	AVR707 A/V Receiver	Introducing the A.		0

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!

New Lead 🔒	Client.	Bir Caminan -	0	Preview	Job Folde	ol 🏹 10	b Folder	Re	fresh	Clear Filters	
Bid Contects Dasht	oard Product		e to Apply earch Filter	ders	Project Manager	Calendar	Timelin				
Add Non Delete F	Product Manager	· oner or	Parent men						Click	Icon to Clear all	1
MODEL ME	G NUMBER	MEG NAME	UNIT	DESCRIPT	ION			FEATURE		Filters	UYOT
8		Sam						1	_	The Conversion	-
HW-h. Click H	ere to	Samsung	00	Click	Here to Remo		Black)	Introducir	g the n.	Capitol	1
UN48J Clear all	Filters	Sameung	ea	This Filter		NO.	V-4_	4K SUHD		Capitol	1
UN65JSeucor conversion		Samsung ea		rnis ritter			TV-6	The Same	suna 4	Capitol	1

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. These settings will be applied to all new Bids. Note: Click on a Client to assign specific prices for a Client. 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. You can choose to automatically save copies of documents to a Job Folder. You can also choose to include optional items in Bids or recurring revenue items in Bids. Shared Path Management and Purchase Order setup features are available for Enterprise users to manage access to Templates, Job Folders and more.

You can choose to work with Word .doc or docx formats. If you choose docx, you will need to have your BidMagic templates in docx format. The latest templates can be downloaded from our support page.

efault Settings Ro	one Systems	Rental Internal	ional Updates Job Phases Pay Period Automater	
Tax Tax Rate 0.07000		-	Decimal Places for Quantity 2 v Default AutoLink Package to ON Activate AutoLink 2 Levels Use SubCategory	Shared Fath Management Matikasama: Sotup a shared drive on a different PC so a users can access this same path. S Set Individual Paths in User Manager S Set Bobal Path for Al Users Auto Save to Job Folder Terrolates Civilient Public/Documents/Ball/Aggs)
🗌 Tax on Co 🗋 Surtax	st Basis (Use	Tax)	Organize by Systems	Job Folder C. Ulaam Public Documents BolMage
Labor	1.401		Activate Price Level 100000	P0 Folder Children Public Documents Bolfage
	540.00	5all \$35.00	() Unit Cost () Sel Price	Reset All Users' Patha
Prewire			Use Inventory Feature Enforce MAP	
Trim	\$40.00	\$85.00		
Finish	\$40.00	\$85,00	Sound ON	
	neco:		Test	
Design/Mgmt	0.00	Sell	User Pasawords (Initial and Reset)	
2:		10000	Default Password BdMagic	
Cost-Price Adjustm	ent			
) Margin Markup	(Manage) Manu contro Per multico	is drux.		Word Format: 🛞 aloc 🔘 doox
				Deplay as Recurring Deplay as Optional

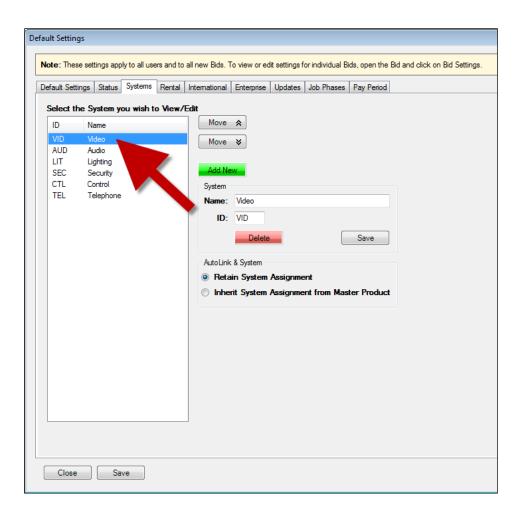
Rooms (Section Headers in a Bid)

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.



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.

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.

_	
ſ	Default Settings
	Note: These settings apply to all users and to all new Bids. To view or edit settings for individual Bids, open the Bid and click on Bid Settings.
	Default Settings Status Systems Rental International Enterprise Updates Job Phases Pay Period
	Activate Exchange Rate 1.40
	Cost to appear in Purchase Order
	Adjusted Unit Cost' of Bid Item
	Base Unit Cost' of Product

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.

Default Settings Status Systems	Rental International	Enterprise	Updates	Job Phase	s Pay Period	4	
Enterprise Administrator setting	gs.						
Use Campus / Rooms				of Recent B	3d Llpdate		
Use Asset Tracking				der Process			
🔄 Enable Large Database Sea	rches	Aloc	ate and 1	Fanafer			
Location/Dept.							
🕑 Use Location/Dept.	Edit	III Nov	AdHoc	bena			
Job Statum							
The second s	Edit						
Assign Events to Update Notify J							
				Do not Not	fy Notity		
When Bid created	B Bid Created				0		
When marked Sold	D Sold Needs Approva	0			0		
Antign Events to Notify Order Sta	éus.						
Request Rutchase Approval	PT Order Request		-		12		
Approve for Purchasing	P2 Order Approved				101		
Pint Purchase Order	P3 On Order		-		191		
Product(s) Received	FIS Inter Received		+		12		

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.

Default Settings Rooms Systems Rental Update Version Notice IP Prompt when update is available	International Advanced Updates Job Phases Pay Period
C Do Not notify	
Show Version Available	
P Display on Help/About	
Update on statup	
Administration out multiceer pending U	pdate
Upgrade in Process Contact Administrator	for nore information.

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.

Default Settings St	atus Systems	Rental	international	Enterprise	e Updates	Job Phases	Pay Period	
In addition to Prewin	e, Trim, and Fink	shi you o	an create up to	five addt	onal Labor P	hases.		
Select the Phase	a you wish to	View/E	da					
Name		Coat	Sel	Move	*			
Prewere	5	40.00	\$95.00	Move	*			
Tim		40.00	\$75.00	- Contraction	and a			
Finish		40.00	\$85.00	Add Nes				
Property land		LA-N.B.	Conservation of the local division of the lo	Phase				
				Name:	Service			
				Cost		\$40.00		
				Sell:		\$90.00		

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.

5d Information			Shalua		1151 94		Jobste (Sent to	(mitalien)		
Current Job Status Bid C	habed		Created	8/11/2016	- BI	O#: #90		Client Addresses:	Jobste Addres	36
Location		~	Submitted				Job Name:	James Brown		
mart			Sold				Address	4315 Wilcos Ave		
Bid Name: mobile te		1	Inactive					1		Int
Sales Person	and an a second to		Lock All Chang		ġ.			Santa Monicia	State:	
Sales Phone:	(300) 598-5860		Job # Approve	d				US	Zp	90211
	0						Phone	(310) 555-1212	2	
PM Name:	Pagni Meni	. •	Labor	Labor Diffi		-	Mobile:	US/Canada ~ 3	10) 614-9064	
Picking				Cost	Sel	Diff	Enail	troy w@dwmgmt.com		
Labor Tax OFF			Prewire	\$40.00	\$85.00	ā	Contact Per	son: Tray Weker		
O VAT/HST			Trim	\$40.00	\$85.00	0	100000000	Job Sile Map	11 N	Edit Chernt Addresses
Tax on Cost Ba	an (User Text)		Finah	\$40.00	\$95.00	—		Job Sile Map	8 (B	Edit Carrie Addresses
Price Level 10			Programming:	\$100.00	\$50.00		Description of	Work		
O Unit Cost	Sel Price		Service:	\$40.00	\$90.00			description of work her	e that your tech	s can see.
0	C. and they		Warranty	\$40.00	\$0.00					
							1.			
							Comments		the second se	1
			Design/Mgmt %:	\$.00	1	10.00	these contract	a appear in installation	coblector recht.	

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.

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.

Opputunty Ppeline	R Sinus
Target Budget: \$2,679.36	Created 5/1/2011 ()+ 8404: (1)
Expected Close Date: 5/ 3/2010 []+ Last Follow-up:	[5/ 1/2010 []*] [] Sold [5/ 3/2018 []*] [] Accord Trace
Stage: works proposal	Y Dinactive
Probability: 100 Next Follow Up	5/ 1/2018 []+ Lock All Changes (Permanent)
Owner: Administrator v Next Action	Job II Approved
	Sent To Quickbooka
Client Notes	Clerk Center
Keep notes about the client here.	Coxy Link to Debaard Deen Center
	Copy Link to captorant Upon Link Current http://constraction.com/statics/carter- cart/constract_price_carter-carter-carter-carter- carter-carter-carter-carter-carter-carter-carter-carter- carter-carter-carter-carter-carter-carter-carter-carter- carter-carter-carter-carter-carter-carter-carter-carter- carter-carter-carter-carter-carter-carter-carter-carter- carter-carter-carter-carter-carter-carter-carter-carter- carter-carter-carter-carter-carter-carter-carter-carter- carter-carter-carter-carter-carter-carter-carter-carter- carter-carter-carter-carter-carter-carter-carter-carter-carter- carter-carter-carter-carter-carter-carter-carter-carter-carter-carter-carter- carter-carter-carter-carter-carter-carter-carter-carter-carter-carter-carter-carter- carter-carter-carter-carter-carter-carter-carter-carter-carter-carter-carter-carter-carter-carter-carter-carter- carter-
	Finished 5: 3:2018 (3:48 PM
Opportunity Notes for this Bid/Job	Approved
Keep notes about this proposal here.	

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.

Sales Stage			_		×
Job Completed - 100 not sure - 50 wants proposal - 100	Add New Sales Stage Stage: Probability:	Job Completed	100		
	Delete	Close		Save	

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.

fid Contacts Deshb	and Destate	Visio	Contact Manager						- 13
0 Al Cartacta	CONT PROVIDE	THEFT	New Sid	New Service 👩 Email Co	intect	5 Schedule Appointment	Cper in Outlook		
LHE .	TYPE	NOTES	Contect Ty				-		
Power Search	10.65	100100	Ed To	po: Load			Opportunity Pipeline		
Biggest lead ever	Client	Good				Physic Shand	Target Budget		\$50.000.00
bob test	Client	0000	Contrat-	Fred Hichaele		Arrented Actional	Owner:	Scott Stevens	
buly.	Lend	_	Address				Expected Close Date:	2/17/2016	B•1
New Big client	Lend	note u			00001				
New lead 123	Leed	opp no	City:		State:		Steps	Warts Proposal	
Rich Right	Lend	old no	Country:		Zp:		Probability:	30	29
Sample Client	Clent	Gale c	Phone:		fax:		Last Follow-up:	1/ 5/2016	- Er
Test new contact	Lend		Mobile				Last Result	Will meet at she	(G)
Thomas Newman	Client	_	Contact Person:				Next Follow Up:	112 9/3019	0-
Torona and	Lund	-	Envit						
Track Leads							Net Adom:	Delver Procesi	<u></u>
& Clients on			Category:						1
a single screen			Stig to - Job ste				Opportunity Nates		1
scienti			Sans as clert				The lead has 5 projects co	aming up	
			Job Contact:						
			Company Name						
			Aikess:						line &
			City:	1 I G	Rate:				backs
			Country:		Zip:	11		Can	Jacks
			Plane		G				
					Fox:				
			Contact Person						
			Enal						

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.

🚠 Client Manager	—		×
Email Client 🖉 New Bid 💭 New Service 💽 Schedule App	ointment	•	
Contact Type: Client			
Bill To Shipping Addresses Pricing	- r		
Tax Rate: 0.07000 - 0.07(~			
O Labor Tax OFF			
Labor Tax ON			
⊖ vat/hst			
Tax on Cost Basis (Use Tax)			
Activate Price Level 1.40000 V			
Unit Cost O Sell Price			
<u>Cost</u> Sell			
Design/Mgmt %: 5.00 10.00			
Delete Close Save Save and Close	e		

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.

BidMagic Enterprise MultiUser Edition -v8.3.0							
File View Bids Print Settings Ten	*I			utorials Re	egister User Gu	ride Help	
📑 New Lead 📠 Client 🚳	Birterationer	- Danme 🖾	Preview 👔 Job Folder 🎬 J	ob Folder	Refresh	Clear Filters	
Bid Contects Dashboard Produc		Here to Apply Search Filter	ders Project Manager Calendar	Timeline			
Add New Delete Product Manager	Fower	Search Filter			Click	Icon to Clear all	1
MODEL MEG NUMBER	MFG NAME	UNIT	DESCRIPTION	1	FEATURE	Filters	UYOTY
	Sam			1	_	and a state of the	-
HW-h. Click Here to	Samsung	00	Click Here to Remove	Black)	ntroducing the n.	Capitol	1
UN48J Clear all Filters	Samsung	ea	This Filter	V-4_ 4	IK SUHD	Capitol	1
UN65JSeuur onvoicerre	Samsung	60	The rate	TV-6_ 1	The Samsung 4_	Capital	5 1

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)

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.

D. Cherry C.	Same ()	to Comment	÷.,	b Folder 📆 Job Folder 📑 Temesti	2									
-			-		a contract of the second se									
Corners 10	wittent Preda	ets Van Dorg	HE (Pastaney Pastane Online Paper Mercey	er ProvilGelander Prov	et Treatre								
dillers.	Product Namper	Seatch		án (ADODL	Search Clean Steams	ng Product	IS: AR							
àran. /	HITCHINGS.	WED HAVE	1.80	T DOCTIFICS	REATURES	SITUAT	8,9 577	HOTY HAP	1.0	100001	10000	NARDN -	BUAKE .	4
		Dana.			Alexy set of	Sector Sector								61
			1	2010 MARIA M. General Parametric Sectors	2005 Pister Littler Denry	DEL	141	11.10	10.00	111.112	1.1	E ILPN-	122	
	Box to Select			2000 to 22010 Name among Langely PLLT.							1.0		and the second second	
Shift Click or	CTL Click to N	uiti select		Setup Remain Control to 101401-101401 Co.							1.0		10.4	
	-		- 75	Administ Plus Constal Paramet Datary	Threading tables in character (1.11			
REPORTED IN CASE	ALC: NO DO NOT	PROTECT OF LAND			ings in an investigation of the						100		1	
NUC	AG-OVC30			DV INCOME NO OVER Dight Converse	The RECEIVER DV INCOME.								\$1,000	
TINAVEREES.		Presson and			Min DV 201 Gamma and 10.0						1.0	007	1.1	45
NO HINCTON				AG-1840 128 regis Definition (types Decom-	The presented new topoment A							007	10	
AG- HERE'S THE				AG-HENTTO High Definition Digital Caracter							1.1		\$11 million	
Contraction of the	- of the second		100	Fight Civity Case							10		111	1.5
		100000000	100	Hald Certy Care by Carolinate							10		100	124
HIGHT CREK O	n Green Box fo	rsuomenu	100	ACI-MYX00G Warrighteen Adapter	The MG-WWADDG is a 3-Chill						100			
			1.00	AG-VL/CHOP Companyies Hand Shell Weather	Part Disk Weather Denser						10		111	
AG MICEO	10/080			AG VOCID Generality Thermotype Hant C.	Thermodyne Heat Care	100					10		111	14
ALC: YOU WANT	ACC YOR THE					-					- Pi		444	
A CONTRACTOR OF	ALC: NOT THE	PROPERTY.		D fam Algons "he littles fam	Distanting Suffering sheet from			1000	MILLION	10.00	8	0.001	4.1	
Gar MEGASPECS													1.6	
14,281	AND DEVICES.			AA-Doo General Parame Indone Park							20	007	111	135
A 104 40	ANT TRACKE	Frankriger,		AA-Goo Conners Partners Indiana Park	the same but the second for						100			
444 (016.20)	AM APACES	A 14100		AAA Sant Deterral Parytonic Rathery Parks	I said California territory						10		21	
444 4014 40	AND ADDRESS	Parameters.		AAA Gost General Pergram Eathery Party	Address Taxan and Processor						100		10	15
444 4016-001	ANA ADVIDE	Distantion of the		Address General Pargues Battery Parts	Address Transmitter						-		T.	
				All PETOD Value Containing Canada	The AW FE120 centeres in						The second		110	
AVOVMEDELISE	AYDVM00E18F	Ратяник:	1148	Mini OV Cassafts		DSH	1	\$14.00	80.03	\$0.00	- Page	E.00%	514.	617
AVOVANIDE_E	AYDVM00EJB	Parateric -	**	Mini OV Cessette		DBH		\$29.95	510.00	\$0.00		0.00%	\$201	
AV-OWNERHD	AV-DVMETHD	Partners	-	and Published Structure Presenter	All monutes recording time	DEL	1	\$11.00	\$0.00	\$0.00	100	8.00%	.001	
AV-OVM65H02	AX-DVMR3HD2	Pareseric -		and the second second second	minutes recording time	DSL-	1	819.86	\$0.00	80.00	12	8.00%	\$181	
AV-DVMKSPGLIS	AP-01460P0	Panesorie	112	Right Click on Grid to Open the Product	a AMO tape belies proved.		18/1	90.00	50.00	60.00	10.00	8.00%	.901	
AV-DAMASEJAP	AV-OVMOSE.HP	Panasonic	1	surface and an entre contract	minimutes recording time	064	1	\$10,00	\$0.00	\$0.98	10	8.00%	\$16.0	
AND/MODE J	AV-DUMBORJ	Panasonic		MiriOV Canadia	and the second descent and the second	DBH	1	\$10.99	56.43	\$0.00	10.00	8 00%	\$101	
NUCLINIA STATE	AV-DVM00EJ1	Pavasonic		Mini DV Cassetto		D&H	1.	\$10.99	\$7.49	\$0.00	- 25	8.00%	\$10.4	
LX00WVCIVA	AY-DVM00KJ	Patennic.		WeiOV Casette		DAH	10	\$12.00	52.40	\$0.00	10.00	.0.00%	\$121	
AVENUEROUT	AVEVM00KJ1	Panascric -		Mini DV Cassatte		D6H	10	\$10.00	58.82	\$0.00	0	0.00%	\$10.1	
AV-HOVIBRAND	AV HOVING	Paralente		AV-HOVTREAMQ DVC Cametra	Advanced Manuer Guality (A.	Parasers	1	\$2.00	50.00	50.90	100	0.00%	501	
AV-HDV276AMQ	and other statistics in the	Panasario		AV HD/075AM0 DVC Casesta	Advanced Master Quality (A.			\$0.00	30.02	50.00		2.00%	\$0.0	
AY HEVDEAND				and the Constant of the second state of the se	Athensel Menter Guelty (A.			50.00	30.00	50.04	1000	0.00%	101	61
and the second se	and the second se	A LINE AND A DECIMAL	-		Contraction of the second second			10155	10000		-			511

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.

Common Field NamesNotesBuyQTYdefault 1. Example: 500 if you buy 500' of cable in a reel (important)CableHardEquipment Sell PriceCableHardCostEquipment CostCategoryPick from Categories you defineDepthDecimal or FractionDescription (required)Short DescriptionDiscontinuedProduct DiscontinuedFeaturesInclude Long features hereFinishHrLabor in HoursHeightDecimal or FractionInstallLabor Flat Rate Sell PriceInstallLabor Flat Rate CostTaxAmount(True/False - do you charge tax for this equipment?)isTaxLabor(True/False - do you charge tax on labor for this item?)MAPMinimum Advertised PriceMarginProfit Margin PercentageMermoFor your own notesMFGNameManufacturer's NameMFGNameManufacturer's Saggested Retail PriceOrder PhaseOrder Phase - Single Phase when product ordered and installedPrewireHRLabor Infind Product (usually in Client Copy)MSRPManufacturer's Suggested Retail PriceOrder PhaseOrder Phase - Single Phase when product ordered and installedPrewireHRLabor Infind Product (usually in Client Copy)MSRPManufacturer's Suggested Retail PriceOrder PhaseOrder Phase - Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)ProductUrlLink to website whe
CableHardEquipment Sell PriceCableHardCostEquipment CostCategoryPick from Categories you defineDepthDecimal or FractionDescription (required)Short DescriptionDiscontinuedProduct DiscontinuedFeaturesInclude Long features hereFinishHrLabor in HoursHeightDecimal or FractionInstallLabor Flat Rate Sell PriceInstallLabor Flat Rate CostTaxAmount(True/False - do you charge tax for this equipment?)isTaxLabor(True/False - do you charge tax on labor for this item?)MAPMinimum Advertised PriceMarkup%Markup PercentageMemoFor your own notesMFGNameManufacturer's NameMFGNameManufacturer's Suggested Retail PriceOrder PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
CableHardCostEquipment CostCategoryPick from Categories you defineDepthDecimal or FractionDescription (required)Short DescriptionDiscontinuedProduct DiscontinuedFeaturesInclude Long features hereFinishHrLabor in HoursHeightDecimal or FractionInstallLabor Flat Rate Sell PriceInstallLabor Flat Rate CostTaxAmount(True/False - do you charge tax for this equipment?)isTaxLabor(True/False - do you charge tax on labor for this item?)MAPMinimum Advertised PriceMarginProfit Margin PercentageMarkup%Markup PercentageMFGNameManufacturer's NameMFGNamberManufacturer's Suggested Retail PriceOrder PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor In HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Modell23.jpg)
CategoryPick from Categories you defineDepthDecimal or FractionDescription (required)Short DescriptionDiscontinuedProduct DiscontinuedFeaturesInclude Long features hereFinishHrLabor in HoursHeightDecimal or FractionInstallLabor Flat Rate Sell PriceInstallCostLabor Flat Rate CostTaxAamount(True/False - do you charge tax for this equipment?)isTaxLabor(True/False - do you charge tax on labor for this item?)MAPMinimum Advertised PriceMarginProfit Margin PercentageMemoFor your own notesMFGNumberManufacturer's NameMFGNumberManufacturer's Suggested Retail PriceModel (required)Model Number to find Product (usually in Client Copy)MSRPOrder PhaseOrder PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
DepthDecimal or FractionDescription (required)Short DescriptionDiscontinuedProduct DiscontinuedFeaturesInclude Long features hereFinishHrLabor in HoursHeightDecimal or FractionInstallLabor Flat Rate Sell PriceInstallCostLabor Flat Rate CostTaxAmount(True/False - do you charge tax for this equipment?)isTaxLabor(True/False - do you charge tax on labor for this item?)MAPMinimum Advertised PriceMarginProfit Margin PercentageMarkup%Markup PercentageMFGNameManufacturer's NameMFGNumberManufacturer's Part Number used to orderModel (required)Model Number to find Product (usually in Client Copy)MSRPManufacturer's Suggested Retail PriceOrder PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
Description (required)Short DescriptionDiscontinuedProduct DiscontinuedFeaturesInclude Long features hereFinishHrLabor in HoursHeightDecimal or FractionInstallLabor Flat Rate Sell PriceInstall(CostLabor Flat Rate CostTaxAmount(True/False - do you charge tax for this equipment?)isTaxLabor(True/False - do you charge tax on labor for this item?)MAPMinimum Advertised PriceMarginProfit Margin PercentageMarkup%Markup PercentageMFGNameManufacturer's NameMFGNumberManufacturer's Suggested Retail PriceModel (required)Model Number to find Product (usually in Client Copy)MSRPOrder PhaseOrder PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
DiscontinuedProduct DiscontinuedFeaturesInclude Long features hereFinishHrLabor in HoursHeightDecimal or FractionInstallLabor Flat Rate Sell PriceInstall(CostLabor Flat Rate CostTaxAmount(True/False - do you charge tax for this equipment?)isTaxLabor(True/False - do you charge tax on labor for this item?)MAPMinimum Advertised PriceMarginProfit Margin PercentageMarkup%Markup PercentageMFGNameManufacturer's NameMFGNumberManufacturer's Part Number used to orderModel (required)Model Number to find Product (usually in Client Copy)MSRPOrder PhaseOrder PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
FeaturesInclude Long features hereFinishHrLabor in HoursHeightDecimal or FractionInstallLabor Flat Rate Sell PriceInstallCostLabor Flat Rate CostTaxAmount(True/False - do you charge tax for this equipment?)isTaxLabor(True/False - do you charge tax on labor for this item?)MAPMinimum Advertised PriceMarginProfit Margin PercentageMarkup%Markup PercentageMemoFor your own notesMFGNameManufacturer's NameMFGNumberManufacturer's Part Number used to orderModel (required)Model Number to find Product (usually in Client Copy)MSRPManufacturer's Suggested Retail PriceOrder PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
FinishHrLabor in HoursHeightDecimal or FractionInstallLabor Flat Rate Sell PriceInstallLabor Flat Rate CostTaxAmount(True/False - do you charge tax for this equipment?)isTaxLabor(True/False - do you charge tax on labor for this item?)MAPMinimum Advertised PriceMarginProfit Margin PercentageMemoFor your own notesMFGNameManufacturer's NameMFGNumberManufacturer's Part Number used to orderModel (required)Model Number to find Product (usually in Client Copy)MSRPManufacturer's Suggested Retail PriceOrder PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
HeightDecimal or FractionInstallLabor Flat Rate Sell PriceInstallCostLabor Flat Rate CostTaxAmount(True/False - do you charge tax for this equipment?)isTaxLabor(True/False - do you charge tax on labor for this item?)MAPMinimum Advertised PriceMarginProfit Margin PercentageMarkup%Markup PercentageMemoFor your own notesMFGNameManufacturer's NameMFGNumberManufacturer's Part Number used to orderModel (required)Model Number to find Product (usually in Client Copy)MSRPManufacturer's Suggested Retail PriceOrder PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
InstallLabor Flat Rate Sell PriceInstallCostLabor Flat Rate CostTaxAmount(True/False - do you charge tax for this equipment?)isTaxLabor(True/False - do you charge tax on labor for this item?)MAPMinimum Advertised PriceMarginProfit Margin PercentageMarkup%Markup PercentageMemoFor your own notesMFGNameManufacturer's NameMFGNumberManufacturer's Part Number used to orderModel (required)Model Number to find Product (usually in Client Copy)MSRPManufacturer's Suggested Retail PriceOrder PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
InstallCostLabor Flat Rate CostTaxAmount(True/False - do you charge tax for this equipment?)isTaxLabor(True/False - do you charge tax on labor for this item?)MAPMinimum Advertised PriceMarginProfit Margin PercentageMarkup%Markup PercentageMemoFor your own notesMFGNameManufacturer's NameMFGNumberManufacturer's Part Number used to orderModel (required)Model Number to find Product (usually in Client Copy)MSRPOrder PhaseOrder PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
TaxAmount(True/False - do you charge tax for this equipment?)isTaxLabor(True/False - do you charge tax on labor for this item?)MAPMinimum Advertised PriceMarginProfit Margin PercentageMarkup%Markup PercentageMemoFor your own notesMFGNameManufacturer's NameMFGNumberManufacturer's Part Number used to orderModel (required)Model Number to find Product (usually in Client Copy)MSRPOrder PhaseOrder PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
isTaxLabor(True/False - do you charge tax on labor for this item?)MAPMinimum Advertised PriceMarginProfit Margin PercentageMarkup%Markup PercentageMemoFor your own notesMFGNameManufacturer's NameMFGNumberManufacturer's Part Number used to orderModel (required)Model Number to find Product (usually in Client Copy)MSRPManufacturer's Suggested Retail PriceOrder PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
MAPMinimum Advertised PriceMarginProfit Margin PercentageMarkup%Markup PercentageMemoFor your own notesMFGNameManufacturer's NameMFGNumberManufacturer's Part Number used to orderModel (required)Model Number to find Product (usually in Client Copy)MSRPManufacturer's Suggested Retail PriceOrder PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
MarginProfit Margin PercentageMarkup%Markup PercentageMemoFor your own notesMFGNameManufacturer's NameMFGNumberManufacturer's Part Number used to orderModel (required)Model Number to find Product (usually in Client Copy)MSRPManufacturer's Suggested Retail PriceOrder PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
Markup%Markup PercentageMemoFor your own notesMFGNameManufacturer's NameMFGNumberManufacturer's Part Number used to orderModel (required)Model Number to find Product (usually in Client Copy)MSRPManufacturer's Suggested Retail PriceOrder PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
MemoFor your own notesMFGNameManufacturer's NameMFGNumberManufacturer's Part Number used to orderModel (required)Model Number to find Product (usually in Client Copy)MSRPManufacturer's Suggested Retail PriceOrder PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
MFGNameManufacturer's NameMFGNumberManufacturer's Part Number used to orderModel (required)Model Number to find Product (usually in Client Copy)MSRPManufacturer's Suggested Retail PriceOrder PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
MFGNumberManufacturer's Part Number used to orderModel (required)Model Number to find Product (usually in Client Copy)MSRPManufacturer's Suggested Retail PriceOrder PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
Model (required)Model Number to find Product (usually in Client Copy)MSRPManufacturer's Suggested Retail PriceOrder PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
MSRPManufacturer's Suggested Retail PriceOrder PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
Order PhaseOrder Phase- Single Phase when product ordered and installedPrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
PrewireHRLabor in HoursProduct ImagePath to Image for importing (ie: C:\MyPictures\Model123.jpg)
Product Image Path to Image for importing (ie: C:\MyPictures\Model123.jpg)
Link to website where Product into is located
Drogram Labor Hours for Drogramming
ProgramLabor Hours for ProgrammingRU (Rack Units)Height in rack spaces
l
Supplier Pick from Suppliers you define to create purchase orders System Pro Varsion
SystemPro Version - Type ie: Audio, Video, Security, Lighting, etc.Total Installed PriceA Calculated Value
Total Labor A Calculated Value
TrimHr Labor in Hours
Unit(Unit of Measure) ea, pr, ft, mtUnitCostYour 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)
WeightAny 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)

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

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

AUDIOCCESS 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.

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 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.

\$398.00

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.

Product Manager													11
Product Info	Favorite	Contraction of the second	Inactive		Add New	Inc	œ		Visio Roor Plan		Bev	tion	
Model (required):	100	WILES 1	1000					1.1		1 1	-		Tal
HTS							0	(14)			-	0	-
Description (requi	red):						_	1		20	L	0	x
DLP Video Projector	100								<u></u>	l]			1
Supplier:			Mig Number		MEGASPECS	Hoi	de:	Width	Length:	Weight			
D&H Distributing		8	RS-1100	C .	International Contraction	63		15	14	17		Copy P	sckage
Category:			Participation in the second			Adri	ink Packag	w Builder	1922	- 10	A		
Video Projectors		¥.	Mg Name:	1			utoLink P	51.D-1707.bb		Save	Product be	fore ac	dding Lini
		1	Digital Projecti	ion		E E		-	Mor				
			UPC:						, Mon				
Features:						9	wantity:	1.00	Add .	Dalate	Move	*	Move 3
1920x1080 native resolu		aturing Digital Prop	ections powerful S	luperDhys	teo roogy for sight.	OT	γ.	UNIT	MODEL	MEG NA	WE	DESC	RIFTIO
prasine, high definision in	ages.					2.724	Power S						
								en l	AVF6507	B&K	_	715	Sambar
Equipment Labo	w Unor Inco	antory Quick	Rooks				HDD) ee	AXS	Middle	Atlant		pment
Ex. Rate			1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-	Tax E	242		2017) en	MAX500	Penam	Phase and a second	10000	e Prote
L D. Nale	Unit Cost:	%Markup	Sell Price:	1 HALL	tin the second se) ea	CT1000	Crestro			r Well
	\$4,995.00	100.00	\$9.990.0	00			1.00	0,05791-	BKT700	Speake		1017214	skor Br
MSRP:	MAP/Web:		Cost		Sel) pr) ce	LX123HST130				is Mode
\$9.990.00	\$0.00	Cable/Hard	53	5.00	\$75.00		2.00	1,02,00	TR700	Speake		1000	ng Spe
Order Phase:	Buy Qty:	Unit:		Rac	k Units	1	100.00		CAT5e	Beiden	rerait		igary 5
Finish v	1	ea ~			0 😩		150.00	1000	16/4	- SEDGREPS			aker co
Stipping	Total Installed	Price:	Hide [Price	Level		100.00	J n	10/4	Signatu	re	oper	jikeli ÇG
\$0.00	\$10,657.50	1	Option	70000									
Product UH: 000	Link -		System:										
			Video										
Memo:					Last Updated:								
Sample					6/28/2016								
	DELETE	eve As New	Save-										

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.

BidMagic Enterprise MultiUser Edi File Vlew Bids Print Setti Rew Lead 🔒 Clier	ngs Templates Im	another device resources the	CALES SOUTHINGS	Products Pro	PARK.
Bid Contacts Dashboard	Products Visio	Purchasing Purcha	sse Orders	Project Manag	er Calendar
Att New Delets Product	Manager				
MODEL	MEG NAME	MFG NUMBER	SUPPLIER	DESC	RIPTION
Power Search					
400/1M 45132 5815 5823		Inter400/1M 45132 5815 5823	D&H Distrit ADI Honeywell ADI	Meti Dee	1 Meter cable on Sensor, Wire r/Window Transi sBreak Sensor
	Honeywell	5628.	Honeywell	Wire	less Security Ke
Get MEGASPECS	CT Security	600-1040	D&H Distrit	buting Can	cord 4 Security F
Send to QuickBooks	Security	60-746-01	D&H Distrit		erbus 2000 LCD
Inventory Transfer	neywell	6160	Honeywell		Alpha Display I
Inventory Transfer/Receive	ĸ	AVR507	B&K	and strange of the Local	Surround Proces
	ddle Atlantic	AXS	D&H Distrit	Contractory of the local day of the loca	pment Rack Sys
Paste Package	ital Projection	RS-1100	D&H Distrit	buting DLP	Video Projector
Billable Service	1	Billable Service		Key	oed is down et d
BKT700	Speakercraft	Bkt700	D&H Distrit	buting Spec	aker Bracket

Copy a Complete 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. For convenience, you can choose to add the package contents to existing packages or replace the packages.

Confirm Paste			
Replace existing Package(s)	Add to existing Package(s)	Cancel	

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.

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:

	U
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 hours

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

In one hour if the installer pulls 400 feet - 1/400 = .0025

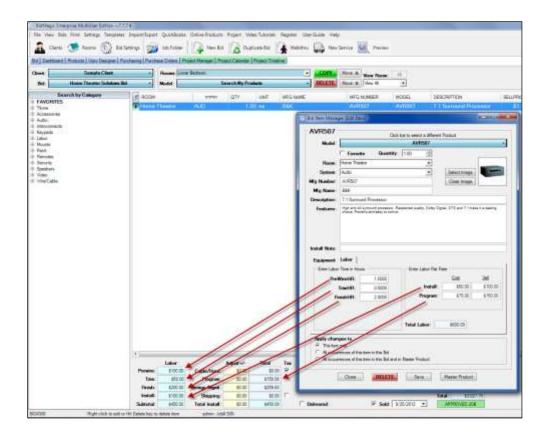
If you prefer not breaking down the labor phases of installation, you can enter just a flat rate dollar amount in the Installation box instead. This is faster, but not as powerful. Leave the HR boxes empty if you wish to enter a single dollar amount for Installation instead.

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.



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. 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.

The Claude Ca	Bostra ()	lid Settinga 🗿	job folder	🗊 ibb folder 📲 Kefned	7-			-						
At Comers 0	miniat Prate	th vanilary	w Pathang	Putter Orbit Project M	anger Prost Daler	te PapelTe	100	Right Click H		en.		Click Header I eck All Check		
ALLINE COMM	Robul Merape	Seerch		in NODEL .	- Jaseth Clear	Showing Pr	udate A	10000		_	Chectourich	ECK AIL CRECK	Desers	
	SPE MARET	MITS NAME	INT INSUMP	CPK	PERTIRES.	2.0	nav 🖌		807-077	APT	me	ANTLUS"	Taxa.	64
n		Constant of the second			110 CONTRACTOR		-					and a second second	and the second	- 10
06-161111	REPORT IN	Procession in the	AND STREET	13 Last to C-K D2-Beau Phone	The Parameter	en les Calition Mail	STREET, STREET		11	11010	80.00		1.1	
		Free and the		128 Lore we Call Doctions Press			and the second second						н.	
				11 with Hybline Coolines Phys		CALAMPTIC COL							- 01	
		Permit		111 with the street Configure Price		meternit Car							0.	
				MARTI PROFESTION ADDRESS	DOT PROMINENT PR								- 01	
				MERCHANNEL TRUCK MANNER									- 01	
CAR POLICE FORME														
CHUI / CHUIDOLAN				inal THURSDINGS Planned		perfect of the								
			ee Hospital	er & Daama 111.000-000.000 die die	en. 1e biblion hallen	The red Marries	PLATE N. P.		Contract of	1 200 10				
					Association in Property	THE PURPOSE			1.1.1.1.1.1.1.1	2000				
					A disease 4271	Replace Test	* SLEVERIC			445.15				
Designate (Dec					Athenna 42*1	1112021200	II Avenue							6
		Parameter		CSU425 Planta TV	ATTN:: NTSC ar	Chi Veher				444.55				
HEISER	1142000011	Deresting		OPD APPENDER TY	CollectPlaner of		-		_	1000	5 80 DE			
H42P9080U	TH\$259(800	Prevolutive		F42P9880U 42" Plesene TV	42" vetlescreen	(managed)	20	1112		8999.51		5329.00	10	
H43F2700J	TH-42992300U	Persecute	te 42°Pas	Carl Are have have a second	The extremety is	No VAc	Fanance Polices	and Darie:		1,999.54	Contraction of the local state	\$0.00	0101	
114292770	THHOPZITU	Parameteric		277U-42* Plasma TV	Parasses: 1081	10010-001				. 299.55			- 82	110
TH42P2800U	TH-42#2806U	Panasers	and the second se	HOPZOOU 42" Planta TV	The VERATH-4	S.Const.		Dayment in	Jaincipal Filmal	295.55		\$0.00	12.2	
TH42P200U	THEREZEDU	Ponescwic		1429/200U 421 Please TV	43" wideocxeer a					1295 55		\$0.00	181	_ 101
TH4292650	THREF2880	Persteame	are - Viela Th	F42P23MJ 42" Please TV	42" webserver 1	Conception in the local division of the loca			-	A 499.64	\$1,284.55	\$0.00		

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.

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.

sect are carefully for	wish to View/Edit	Close	Selected Produ	cta Show All	1.	
Accessories			CATEGORY	SUBCATEGORY	MODEL	DESCRIPTION
abing			Audio	Amps/Preemps	AVR507	7.1 Surround Processor
intro	Category		Audio A	Amps/Preamps	PX612	MuttiRoom Power Amp
etalation Equip abor	Audio		Audio 🔤	Amps/Preamps	PX700	MultiRoom Controller
sck	Delete	Seve	Audio 🔤	Amps/Preamps	SR5005	Marantz SR 5005 AV rec
ecurity sealors	Distantia and	Seve	Audio -	Interconnects	16/4	Speaker cable 4 conduct
ideo -		Merge	Audio I	Interconnects	400/1M	FICA 1 Meter cable
nps/Preamps ookshet Speakem	All Here					
	Add Meenson SubCategory Interconnects Debate	Serve Merge				

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.

Product Manager	5						*		- 12	
roduct info Model trequired):	Favorite		Inactive	- Add New	inage		r			
THE COLUMN	÷				0	8				
Description (requi	ired):					X				
DLP Video Projector	3									
Supplier:		5	1992 (1997) (1977) (1	MERADOCH	Height:	Width	Length:	Weight		
AVAD		19	Mg Number: VS-1100	[Suscentinearcount]	6.3	16	14	17	Copy Package	e
Category:		-	And and a state of the state of		AutoLink Packa	ne Rubber				
Adeo			Mig Name: Digtal Projection		AutoLink	The second second		Save Pro	fuct before adding L	'n
			Ugtal Projection	~			Mo			
2-25/174			l l	1	Guardity:	1.00	Add	Delete	Move & Move	
eatures:					Cataratity	1.00	- Add	- DEIOCO	MOVE SC HOVE	-
920x1080 native resolu mäges	otion DLP light engine N	saturing clearview (echnology for bright, prior	ins, high definition 👘 👘	QTY	UNIT	MODEL	MEG NAME	DESCRIPTION	Å
					Power	Search				
				10	10	0 ea	AVR507	B&K	7.1 Surround	1
Equipment Lab	or User Qui	ickBooka			1.0	0 ea	MAX500	Penemex	Surge Protect	
				Equip	2.0	0 pr	TR700	Speakercraft	Ceiling Spea	1
	Unit Cost:	and the second s	Sell Price:		1.0	0 ee	AXS	Middle Atlant	Equipment R	2.
1122222	\$9,990.00	0.00	\$9,990.00	125	1.0	0 ea	Intel	Niles	Intellicontrol.	ł
MSRP: \$9.990.00	MAP/Web: \$0.00	i. Lavar antis	5200.00	5400.00						
Concernance of the second		Cable/Hard:		S400.00						
Order Phase: Fright	Buy City:	Unit:	1	OIG.						
	Total Installed	1.00	Hide PiPe	ice Level						
Shipping \$0.00	511.006.2		_ rece ⊵rr Option	Ne cores						
		<u>e</u> l 11								
Product UM: Oss	nlink		System: Video							
Memo:			V1060							
Memo: Sample				Last Updated: 6/8/2018						
1	The second second second second	Service and			100					
Close	DELETE	Save As New	Save	Save and Close	<					

Once a package has been created, you can copy the package to the clipboard and add it to other products, with a choice to add or overwrite any existing package items. Right Click on a product or use Shift Click to select a range of products that you wish to paste the same package to.

HTS	VS-1100		Digital Projection	A
HTSilver	HTSilver			
Install Hr	Install Hr		Inhouse	In
Install Labor	Install Labo	or	Inhouse	In
Intel	NCI400		Niles	С
KPS101	KPS101			
I Y122HOT12C2B	I Y122HOT	13G3B		
Product Manager		S	Panamax	A
Get MEGASPECS				
Send to QuickBooks				
Paste Package				
Misc 44	Misc 44			

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.

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.

				0.0	ADD	Packag						
			Quantity 1	and the second second		QTY		UNE	MODEL	MEG NAME	DESCRIPTION	IN
				Add Package	3 •		1 00	100	AVRS07	TUCK	7.1 Surround Proc	-
Hodel: HTS	5						2.00		AXS	Middle Atla	Equipment Rack S.	_
Description	DLP Video Proje	ctor .				2	1.00		MAX500	Panamax	Surge Protector	6
	Favorite			Last Update	6/28/2016		1.00	60	CT1000	Crestron	Color Wall Touchp.	E
							1.00	pr	BKT700	Speakercraft	Speaker Bracket	6
Mg Number:	RS-1100			MEGA SPECE			1.00	-	LX123HST	Stewart Fil.	Luxus Model A + 12.	- 6
Mg Nase:	Digital Projection	e)		Select image	0		2.00	pr	TR700	Speakercraft	Ceiling Speakers	6
Supplier:	D&H Detributing			Clear Image		11	00.00	Ħ.	CAT5e	Belden	Category 5e netwo.	Ę
Category:	Video Projectors	-				1.1	50.00	Ħ.	16/4	Signature	Speaker cable 4 co.	6
Features	1920x1080 rasive ra technology for bright		and an end of the								-	
Equipment La Order Phase: Firsth	bor				woritory:						*	
Unit Cost:	Markup %	Sell Price:	Tax Equip	MSRP:		Prod	Suct Ma	anage	•			
\$4,995	many personality of the little	\$9.990.0	10	\$9,990.0	0							
Unit: Tota es ~	al Price: \$9,990.00		Cost	Set		Pa	ockaç	ge T	otal	\$19,589.29		
		Cable/Hard:	\$35.00	\$75.0	0							
Shipping: \$0.1	Total Installe	Charles Contractor	Hide Option	Price Leve	el							
	to											
Apply changes	v .											

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.

		Lin an existing bid, open the bid and click on Bid Properties. P [Revtat] International [
Select I	the System you wish	to View/Edit
MD SEC	Audio Video Securty	Move #
CTL LIT TEL	Centrol Lighting Telephone	System Name: Audio ID: AUD Debte: And Name Save
		AutoLick & System

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.

ACQUIRING Products and Prices for your product list

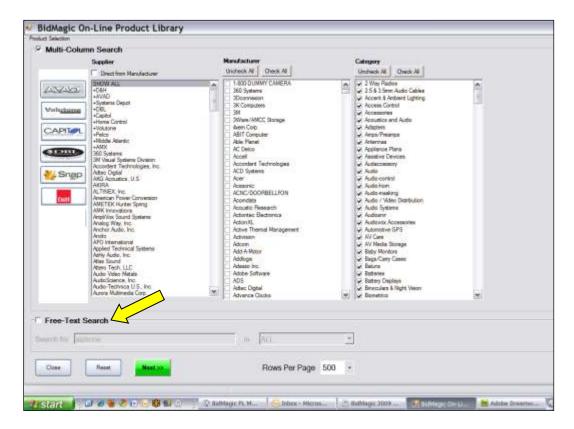
Acquiring product data from hundreds of manufacturers and keeping it up to date is a daunting task for installation companies. If your suppliers send you a current pricelist in Excel, you can import them with BidMagic's import wizard including your dealer cost. (See Import/Export Menu)

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.



MEGASPECS – Consumer AV & Security Products (Included with Online Search Tools Subscription)

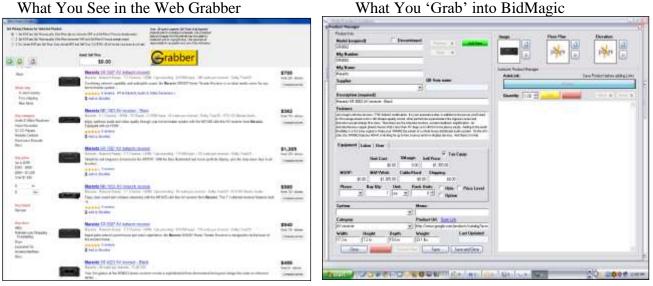
Do you want the most complete product info in our industry? MEGASPECS delivers the highest quality specifications, images and features for over 3 million products! This makes it easy to locate products and to instantly download the data into BidMagic for your proposals. Open or Add a new Product in the 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.

Favorite Asset Tracking Add New Model (required): Discontinued InActive Bage For Pan Bevation Obscontinued InActive Image	roduct info		1		Visio			
CT1000 Description (required): Cdor Wall Touchpanel Supplier Crategory: Keypada SubCategory: CT1000 Mig Name: Crategory: Keypada SubCategory: Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home AV system. Features: Eggant coser touch some controller for your home	Discontinued		Image			ing (protocol)	Bevation	
Color Wall Touchpanel Supplier: Destrom Category: King Name: Category: Wig Nume: Centrom SubCategory: Supplier: Wig Nume: Centrom SubCategory: Supplier: Wig Nume: Centrom UPC: Model Says and a construction to more AV system. Engant coor touch some controller for your home AV system. Engant coor touch some controller for your home AV system. Equipment Labor User Invertions Standard: Standard: Vest MSRP: MAP/Wob: Stop 00 Stop 00 <td></td> <td></td> <td>-</td> <td>9</td> <td>00</td> <td>1</td> <td></td>			-	9	00	1		
Color Wall Touchpanel Supplier: Destrom Category: King Name: Category: Wig Nume: Centrom SubCategory: Supplier: Wig Nume: Centrom SubCategory: Supplier: Wig Nume: Centrom UPC: Model Says and a construction to more AV system. Engant coor touch some controller for your home AV system. Engant coor touch some controller for your home AV system. Equipment Labor User Invertions Standard: Standard: Vest MSRP: MAP/Wob: Stop 00 Stop 00 <td></td> <td></td> <td></td> <td>*</td> <td>88</td> <td>(x)</td> <td></td>				*	88	(x)		
Mig Number Mig Number <td></td> <td></td> <td>Second Co.</td> <td></td> <td></td> <td>10000</td> <td></td>			Second Co.			10000		
Section CT1000 Mg Name: Creation SubCategory: • CT1000 SubCategory: • Ction SubCategory: • Ction SubCategory: • Ction UPC: • ActoLink Package: Save Product before adding Lin Features: • UPC: Model Elegant core tool somen controller for your home AV system. UPC: Model CTY UNIT MODEL MFG NAME DESCRIPTION Elegant core tool somen controller for your home AV system. Ctick Books 0TY UNIT MODEL MFG NAME DESCRIPTION Equipment Labor User Inventory Amet Chick Books • 100.00 ft CAT/5e Belden Cotegory 5e Equipment Labor User Inventory MEGASPECS search did not yield an exact match. • 100.00 ft CAT/5e Belden Cotegory 5e MSRP: MAP/Web: S0.00 To • No • • • • • • • • • • <t< td=""><td>Supplier:</td><td>MEGA SUTOS</td><td></td><td></td><td></td><td></td><td></td></t<>	Supplier:	MEGA SUTOS						
Category: Grada SubCategory: UPC: Features: Elegant color touch screen controller for your home AV system. Elegant color touch screen controller for your home AV system. Equipment Labor User Inventory Amate Chaick Books Equipment Labor User Inventory Amate Chaick Books Equipment Labor User Inventory Amate Chaick Books MEGASPECS search did not yield an exact match. Would you like to search the MEGASPECS website? Store Those Store These Store The Store Th	Destron +					Weight	<u></u>	
SubCategory: Cleatron UPC: AutoLink Package: Save Product before adding in Features: Model Model Model Catarets: Model More: More: Engant core touch somen controller for your home AV system. More: More: More: Engant core touch somen controller for your home AV system. Power Scarch Model More: Equipment Labor User Inventory Annet DESCRIPTION Equipment Labor User Inventory Annet Desider MSRP: MAP/Web: Stollogic MEGASPECS search did not yield an exact match. Would you like to search the MEGASPECS website? Stollogic Would you like to search the MEGASPECS website? Noi	Category:		6.2	51	3	-1		
SubCategory: AutoLink Package: Save Product before adding Lin Model Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2">Colspan="2" Save Product before adding Lin Model Colspan="2">Colspan="2">Colspan="2" Equipment Labor Vestion Labor Labor Colspan="2" MEGASPECS search did not yield an exact match. Would you like to search the MEGASPECS website? S0:00 S0:00 <th co<="" td=""><td>Keypada 👻</td><td>7.000</td><td>AutoLink Packag</td><td>e Builder</td><td></td><td></td><td></td></th>	<td>Keypada 👻</td> <td>7.000</td> <td>AutoLink Packag</td> <td>e Builder</td> <td></td> <td></td> <td></td>	Keypada 👻	7.000	AutoLink Packag	e Builder			
Model Centures: Bigant color touch soreen controller for your nome AV system. Content tour soreen controller for your nome AV system. Content tour soreen controller for your nome AV system. Content tour soreen controller for your nome AV system. Content tour soreen controller for your nome AV system. Content tour soreen controller for your nome AV system. Poweer Secarch > T00.00 ft Contengory 56 BidMagic WEGASPECS search did not yield an exact match. Ves No-	SubCategory:	5.0000	AutoLink P	ackage:	i	Save F	froduct before adding Lini	
Examiting: 1.00 Chariting: 1.00 And Delite Move & M	- 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 1	UPC:			Mod	fel		
Equipment Labor User Inventory Amat Outor React Equipment Labor User Inventory Amat Outor React BidMagic BidMagic BidMagic BidMagic BidMagic MSRP: MAP/Web: Stolog Stolog Stolog MEGASPECS search the MEGASPECS website? Stolog Stolog Stolog Stolog No No	Features:			1.00	101	Paler	[Here as] Here a	
Equipment Labor User Inventory Asset ChickBooks Unit Cost: XMark \$500.00 10 MSRP: MAP/Wab: \$0.00 2006cr Order Phase Bkg Cty: Unit Tm 1 ss	Elegant color touch somen controller for your home AV system.		Guariny:	1.00	E	- Veine	move x move	
Equipment Labor User Inventory American Category Se Equipment Labor User Inventory American Category Se Unit Cost: XMark \$500.00 BidMagic BidMagic BidMagic MSRP: MAP/Web: \$0.00 S0.00 Cabler Would you like to search the MEGASPECS website? Would you like to search the MEGASPECS website? Order Phase: Bug Qty: Unit Test No			QTY	UNIT	MODEL	MFG NAME	DESCRIPTION	
Equipment Labor User Inventory Amet OxickBanks Hit Cost XMark \$500.00 10 MSRP: MAP/Web: \$0.00 \$0.00 Cabler Order Phase Bug Oty: Unit Tm 1 ss Ves No			Power S	Search				
Unit Cost XMark S500 00 MSRP: MAP/Web: \$0.00 \$0.00 \$0.00 Coder Phase Rxg Cty: 1 ss			100.00	0x11	CAT5e	Belden	Category 5e	
Unit Cost: XMark S500.00 MSRP: MAP/Wab: 30.00 50.00 Coder Phase: Buy City: 1 ss	The second			-				
MSRP: 5500.00 10 MAP/Web: Would you like to search did not yield an exact match. S0.00 S0.00 Cabler Order Phase: Buy City: Unit: Tmm 1 ss	Library Contract of Contract o	Magic		250				
MSRP: MAP/Web: MEGASPECS search did not yield an exact match. \$0.00 \$0.00 Cabler Order Phase: Buy City: Unit Tmm 1 sa	and the second se							
S0.00 S0.00 Cabler Order Phase: Buy City: Unit Tmm 1 sa								
Order Phase: Buy City: Unit Tim • 1 sa Ves No	and the second se	Would you like to search the ME	GASPECS website?					
Tim • 1 ea Ves No				_				
	Order Phase: Buy Qty: Unit	- Max	-	_				

Web Product Grabber – Web Shopping (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!

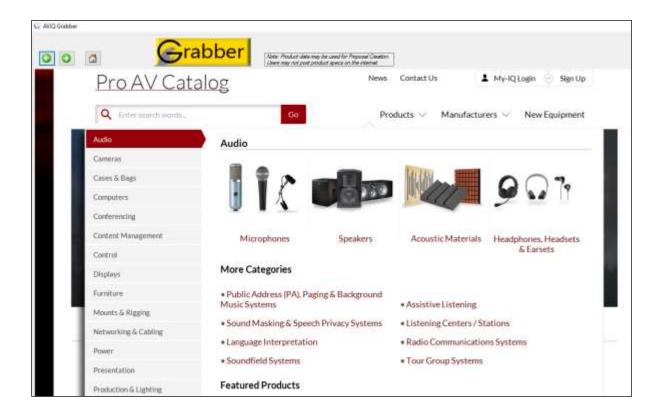


Because the architecture of webpages is not consistent, the Grabber does not work for products available from just one website. Look for products that are available from at least 2 stores for success. In some cases the Grabber can capture all of the information displayed on the current page but no more. 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.

What You 'Grab' into BidMagic

AViQ Grabber – Commercial AV Products (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.



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.

	luttilitier Edition -v8.5.0.3		_				_	
File View Bids Pr	int Settings Templates Import/Expo Client 💮 Bid Settings 🌑		The second second second	Products Proj		egister User	-	licate Bid
Bid Contacts De	shboard Products Visio Purchasia	ng Purcha	tse Diders	Project Manager	Calendar Timeline			
Chert DG	Thomas Newson Avecome Theater Bd	Hooms	Breakfast F		My Products		Move A	Vew Roo
Search by Calegory	ROOM	sistan	QTY I	NODEL	DESCRIPTION		SELLPRICE	TOTALPRIC
III FAVORITES	Family Room Note: Theatre	WD.	1 00 1		DLP Vided Projector		\$6,000.00	\$9,000
IE Accessories IE Audio IE Audio Electronics	Eamily Room Home Theatre	AUD	4.00 1	AVR507 FR700	7 1 Surround Processo Ceiling Speekars		\$3,995.00	

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.

		OverEdition-v8.50.1 Settings Templates Import/Exp	ort: QuickBo	oks Onlin	e Products - P	Project Video Tutorials Re	egister	User Guid	e Help	
-						Folder <u> </u> Job Folder	-	New Bid	Dup	Hica
Bid C	onia Dashe	soard Products Visio Purchasi	ing Purcha	use Orders	Project Mane	iger Calendar Timeline				_
Gert [Thomas Noveman	- Rooms:	Breakfast	Room		-	COPY	Move A	v
Bd		Awenome Theater Bid	Model		Sea	erch My Products		DELETE	Move ¥	196
Searc	th by Category	E ROOM	8-8780	QTY.	MODEL.	DESCRIPTION		THE SEL	LPRICE	TO
iii: "None	atts	Family Room Home Theatre	(IIV)	1.00	HTS:	DLP Video Projector			\$9,990.00	
Access	ones	Eamly Room Home Theatre	AUD	1.00	AVR507	7.1 Surround Processo	r	2	\$2,995.00	

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.

	Flag as Contacte	sa ing he	v Bid 😡 New Service	Schedule Appointment	Open in Outlook	•
Bill To				Opportunity Pipeline	1	
	Citer		Pitvale Shared	Target Budget:		\$50,000.00
Contact	Bob Fletcher			Owner:	Sales	
Address:	111 Old Towne St.			Expected Close Date:	12/18/2013	8.
City:	Webster Groves	State:	OM	Stage:	Prospect	
Country:	US	Zip:	63122	Probability:	40	
Phone:	(314) 555-1212	Fax:		Last Follow-up:	11/ 6/2013	
Mobile	(314) 555-1213			Last Result:	Follow-up	•
Contact Person:	Bob			Next Follow Up:	11/28/2013	
Email:	bobfletch123@gmail.com			Next Action:	Meet at new home	
Category:						
Ship to - Job site				Opportunity Notes Restoring old Victorian hor	ne in Webster Groves, Will	want high end home
Job Contact:				theater system and securit		
Company Name:	Bob Fletcher					
Address:	111 Old Towne St.					
City:	Webster Groves	State:	MO			
	US	Zip:	63122			
Country:	100000000000000000000000000000000000000	Fax:				
	(314) 555-1212					

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

	ic Ultimate Enterprise MultiUser Edition -v8.10.35 ew Bids Print Settings Templates Import/Export QuickBooks	Online Proc	ducts Project Vide	o Tutorials Register User Guide Hel	p	
-	• • •	eview 💋	Job Folder	331.00%	Duplicate Bid	1
Bid C	ontacts Dashinged Products Visio Designer Purchasing Pv	rchase Order	s Project Manage	F Project Calendar Project Timeline		
Client:	Mike Herry • Rooms: Brea	klast Roon	\$	· COPY. Nove	New Room:	- 14
Bd	NAME /		Search My Produc	to · DELETE Move	Vew Al	-
Sean	Billy Bob Keith lext		MODEL	DESCRIPTION	SELLPRICE	TOT
FAVO		jection	HTS	DLP Video Projector	\$9,990.00	5
- Cablio	New lead 730	Imscreen	LX123HST13G38	Luxus Model A - 123" Motorized Screen	\$1,499.00) 5
i "None	Sample Client1	-	AVR507	7.1 Surround Processor	\$2,995.00	5
E 2222 Access	Ten Barden	antic	AXS	Equipment Rock System	\$269.43	
1 Auto			MAX500	Sume Drotector	\$94.10	

Click on the Client icon to open or edit the active client. Pro/Enterprise users can setup multiple addresses and default pricing for each Client. Creating a new bid will apply the prices for that Client, but can be edited in Bid Settings.

🚨 Client Manager — 🗌 >
Email Client 🔤 New Bid 💭 New Service 💽 Schedule Appointment
Contact Type: Client Bill To Shipping Addresses Pricing
Tax Rate: 0.07000-0.07(↓ ○ Labor Tax OFF ● Labor Tax ON
Tax on Cost Basis (Use Tax)
Activate Price Level 1.40000 Out Cost Sell Price
Cost Sell Design/Mgmt %: 5.00 10.00
Delete Close Save Save and Close

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.

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 \sim }/ % 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.

🔁 New Bid		- 🗆 X							
New Bid Record									
Bid Name: Ne	Bid Name: New Bid								
Client: Th	Client: Thomas Newman ~								
SalesPerson Name	SalesPerson Name: Administrator								
SalesPerson Phone	SalesPerson Phone: 800-598-5860 \$0.00								
Project Manage	r: Administrator ~								
Cannot be changed later									
Campus: D	efault 🗸 🗸								
Organize by Sys	tems								
Jobsite Information									
Same as client	Location and								
	choices canr	lot be							
Address: 42	30 Vista Way								
City: M	alibu State:	CA							
Country:	Zip:	90265							

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.

Information		Labor		Jobate (See		
ment Job Status: Bid Orested				1	Client Addresse	 Jobste Address
id Name: CC Test		Preware	208 55E 1 540.00 545.00 [Company	Name:	
Sales Person: Rich	Rinh 🔍	Tree	\$40.00 \$85.00 [a: 30390 Morning Vie	w Dr
Sales Phone: (310	614-9064	Finah	840.00 865.00 [The second	v: Malbu	State: CA
PM Nome: Rich	Reti 🗸			Country		Zip: 90265
tiong				0.000	e: 010 925-1111	
E Labor Tax OFF					e: US/Canada ~	(310) 614,9064
VAT/HST					t: doug@widoatrang	
Tax on Cost Basis (U	se Tax)				Person: Steve Rayer	11/
Price Level 1.00000	-		Contraction of the			
TAUGH STRUCTURE AND	let Prox	Design/Mget %:	0.00 0.00	0	Job Site Map	Edt Clevet Addresses
 Digits as Recurring 	Display as Optional			Description		
				Connents		
				Contraction		
Printed and provide the	and the start of the start	conference and a		-	enn mension	
cee Seve	Send to GB Extenses Sen	id to Q8 house Se	of to GIB Selies Crose	Reset Bd Products to GB	I Lok Send Bid P	odyts To GB
se Seve	Send to QB Extension Sen	of to QB Invoice Se	d to GB Sales Order	Reset Bd Poduds to GB	I Link Send Bd A	odurts To QI
		din GB hoose Se	et to GB Seles Drate	Feart Bid Products to OB	I Link Send Bid P	odurte To QB
id Settings - CC Test - Sen	sple Client		et to GB Seles Order	Peart Bd Podude to OB	I Law. Send Bd P	
d Settings - CC Test - Sen			rd to Gill Seles Onder	Reat Bd Poduts to GB	l Low. Send Bd P	
d Settings - CC Test - Sen	sple Client		d in GB Seles Onter	Peset Bet Pookuts to GB	l Link. Send Bid A	
d Settings - CC Test - Sen and Russes a: Bid System Esnal Class	iple Clent nin Bid . Job Nanbur . Sales Ppell		d in GB Seles Onter	Peset Bet Pookuts to GB	Send Bd A	
d Settings - CC Text - San and Rooms in Bit System Ensel Claimt Opcorumity Poolene	gle Clent nin Bit Joh Norber Salen Ppak Birheitige Appointmet	ne Perrent Per	d in GB Seles Onter	Peset Bet Pookuts to GB	Ratus Created	- 1 9/ 6/2013 []]+ BID#; [30]
d Settings - CC Text - San and Roomain Bit System Ensel Clairt Opcotunity Pooline Target Budget	gle Clent n n Bit _ Joh Nanbar _ Salen Ppak Bichedide Appointment	na Parrent Plan			Sana S Created S Submitted	- 1
d Settings - CC Text - San and Roomain Bit System Email Claim Opportunity Pooline Tanget Budget: Espected Claim Date	gele Client n n Bit _ Job Number _ Salen Pyrak Scheduler Appointment 1 97 5/2013	na Passent Plan 10.00 In - Last Follow	up: 5-52019	Q-1	Ratus Sciented Statustited Sold	- 1 9/ 6/2013 []]+ BID#; [30]
d Settings - CC Tent - San and Roomain Bid Spater Email Clarit Opportunity Pooline Tanget Budget Expected Class Date Stage:	gle Clent n n Bit _ Joh Nanbar _ Salen Ppak Bichedide Appointment	ne Persent Par 10.00 ⊡+ Last Follow ↓ Last Res	up: 5/5/2019 uft:	@•]	Solut Cocated Solutined Sold	- 1 9/ 6/2019 []+ 9/ 5/2019 []+
d Settings - CC Tent - San and Roomain Bit System Email Claim Opportunity Pooline Tanget Budget Exponented Claim Date Stage: Phobability	gle Clent n n Bit _ Job Number _ Sales Pyrak Schedule Appointment 97 5/2015 Priewsted	ne Pageant Plan 10.00 U Last Follow Last Fellow Nest Follow	up: 5/5-2015 utt: Up: 5/2015	Q-1	Ratus Consisted Solid Isolative Lock All Change	
d Settings - CC Tent - San and Roomain Bit System Email Claim Opportunity Pooline Tanget Budget Exponented Claim Date Stage: Phobability	gele Client n n Bit _ Job Number _ Salen Pyrak Scheduler Appointment 1 97 5/2013	ne Persent Par 10.00 ⊡+ Last Follow ↓ Last Res	up: 5/5-2015 utt: Up: 5/2015	@•]	Status Cocated Statustined Sata Isactire Lock Al Chars Add H Approve	
d Settings - CC Tent - San and Roomain Bit System Email Claim Opportunity Pooline Tanget Budget Exponented Claim Date Stage: Phobability	gle Clent n n Bit _ Job Number _ Sales Pyrak Schedule Appointment 97 5/2015 Priewsted	ne Pageant Plan 10.00 U Last Follow Last Fellow Nest Follow	up: 5/5-2015 utt: Up: 5/2015	@•]	Ratus Cocated Solution Sold Isock Al Chars Add if Approve Sent To Glack	
d Settings - CC Tert - San and Rooman Bill System Email Claimt Opportunity Pholine Target Budget Espected Claim Date Stage: Phobability Owner: Dart Nove	gle Clent n n Bit _ Job Number _ Sales Pyrak Schedule Appointment 9/ 5/2015 Interested Rich Rich	ne Pageant Plan 10.00 U Last Follow Last Fellow Nest Follow	up: 5/5-2015 utt: Up: 5/2015	@•]	Ratus Coccated Solid Solid Lock Al Charse Lock Al Approve Sent To Gaack Clart Center	- 2 <u>9 6-2015 []-</u> <u>9 5-2015 []-</u> <u>9 5-2015 []-</u> BIDR: []20 ges (Permanent) d books
d Settings - CC Tent - Sen and Roomain Bid System Email Client Cococurity Portine Targot Budget Espected Clear Date: Stage: Probability: Owner:	gle Clent n n Bit _ Job Number _ Sales Pyrak Schedule Appointment 9/ 5/2015 Interested Rich Rich	ne Pageant Plan 10.00 U Last Follow Last Fellow Nest Follow	up: 5/5-2015 utt: Up: 5/2015	@•]	Ratus Coccated Statusited Statusited Isolative Lock All Charse Sent To Quack Clart Center Sent To Quac	- 3 9 6-2015 ()- 9 5-2019 ()- 9 5-2019 ()- 10 10 10 10 10 10 10 10 10 10
d Settings - CC Tert - San and Rooman Bill System Email Claimt Opportunity Pholine Target Budget Espected Claim Date Stage: Phobability Owner: Dart Nove	gle Clent n n Bit _ Job Number _ Sales Pyrak Schedule Appointment 9/ 5/2015 Interested Rich Rich	ne Pageant Plan 10.00 U Last Follow Last Fellow Nest Follow	up: 5/5-2015 utt: Up: 5/2015	@•]	Satus Cosated Saturative Sold back All Onars Cost To Gatch Clear Center Copy Unit to 1	3/ 6/2013 BID#; 201 3/ 5/2013 BID#; 201 ses (Permanent) disories 5/2019/05.42 PM Optionant 5/2019/05.42 PM
ed Settings - CC Tert - San and Rooman Bill System Email Claimt Opportunity Pholine Tanget Budget Exponeted Claim Date Stage: Phobability Owner: Dart Name	gle Clent n n Bit _ Job Number _ Sales Pyrak Schedule Appointment 9/ 5/2015 Interested Rich Rich	ne Pageant Plan 10.00 U Last Follow Last Fellow Nest Follow	up: 5/5-2015 utt: Up: 5/2015	@•]	Sana © Created Salamited Sala Isadire Lock Al Chars Add It Approve Sent To Galok Clert Cetter © Sent To Galok Clert Cetter Oop Link to 1 Gog Link to 1	s/ 6-2013 [] 3/ 5-2013 [] 3/ 5-2013 [] ges (Permanent) d books eet Canter (Sr 5-2019 05 42 PM) Cobuset (Canter Conter (Cobuset M) (Set 1)/5/10-205 encode
ed Settings - CC Tert - Sen and Roomain Bid System Email Claret Coportunity Portine Targot Buckpet Espected Classe Date: Stage: Probability: Owner: Ower Noise State: in 7890	ple Clent n n Bid Job Number Solen Fyeld Schedule Appointment 9/ 5/2015 Internated Rob Rehl	ne Pageant Plan 10.00 U Last Follow Last Fellow Nest Follow	up: 5/5-2015 utt: Up: 5/2015	@•]	Rotus Coccated Saturated Saturated Isola Al Charge Add It Approve Sent To Gatch Clart Center Sent To Clark Clart Center Sent To Clark Clart Center Cocce Units of Cocce Units Cocce	
ed Settings - CC Tert - Sen and Roomain Bid System Email Claret Coportunity Portine Targot Buckpet Espected Classe Date: Stage: Probability: Owner: Ower Noise State: in 7890	ple Clent n n Bid Job Number Solen Fyeld Schedule Appointment 9/ 5/2015 Internated Rob Rehl	ne Pageant Plan 10.00 U Last Follow Last Fellow Nest Follow	up: 5/5-2015 utt: Up: 5/2015	@•]	Sana © Created Salamited Sala Isadire Lock Al Chars Add It Approve Sent To Galok Clert Cetter © Sent To Galok Clert Cetter Oop Link to 1 Gog Link to 1	s/ 6-2013 [] 3/ 5-2013 [] 3/ 5-2013 [] ges (Permanent) d books eet Canter (Sr 5-2019 05 42 PM) Cobuset (Canter Conter (Cobuset M) (Set 1)/5/10-205 encode
ed Settings - CC Tert - San and Rooman Bill System Email Claimt Opportunity Pholine Tanget Budget Exponeted Claim Date Stage: Phobability Owner: Dart Name	ple Clent n n Bid Job Number Solen Fyeld Schedule Appointment 9/ 5/2015 Internated Rob Rehl	ne Pageant Plan 10.00 U Last Follow Last Fellow Nest Follow	up: 5/5-2015 utt: Up: 5/2015	@•]	Rotus Coccated Saturated Saturated Isola Al Charge Add It Approve Sent To Gatch Clart Center Sent To Clark Clart Center Sent To Clark Clart Center Cocce Units of Cocce Units Cocce	

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.

BidMagic Enterprise Multi	User Edition ~v8:5.0.3			
New Lead	Client 🔞 Bid Settings 🌘 I	Rooms 🧧		er User Guide Help
Bid Contects Dash	board Products Visio Purchasin	Purche Rooms:	se Orders Project Manager Calendar Timeline Breakfast Room	COPY Move &
Bid:	Awesome Theater Bid	Model:	Audio System Balconv	Move \$
Search by Category	ROOM	SYSTEM.	Bar/Lounge Basement	THE SELLPRICE
FAVORITES	Family Room Home Theatre	VID	Bath 1	\$9,990.00
16 Accessories	Family Room Home Theatre	AUD	Bath 2	\$2,995.00
III Audio III Audio Electronics	Eamily Room Home Theatre	AUD	Bedroom 1	\$389.00
Consumer Electronics	Eamily Room Home Theatre	AUD	Bedroom 2 Bedroom 3	\$329.00
Interconnects	Eamily Room Home Theatre	CTL	Bedroom 3	51,199.00
 Keypads Labor 	Guest Bedroom 1	VID	Bedroom 5	\$1,799.00
G Mounts	Guest Bedroom 1	VID	Bedroom 6	\$179.00
III Rack	Guest Bedroom 1	VID	Billiard Room	\$24.00
Remotes	Guest Bedroom 1	AUD	Breakfast Room Bunk Room	5139.00
Speakers Video Video Electronics		100	Cabanna Card Room	3138.00

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.

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.

QuickBo	oks Online Prod	ucts Project	Video Tutorials Register User Guide
_	PUBLIC		
Folder	🥖 Job Folder	Refresh	New Bid 🛕 Duplicate Bid
urchasing	Purchase Orders	s Project Mar	nager Project Calendar Project Time
Rooms:	Conference Roon	1	- COPY
Model:		Search My Pr	oductsDELETE
	MODEL	MFGNAME	DESCRIPTION
			proj 🛛 🕅
	1650	3M	Budget 1650 Overhead P Actor
	202057	Olympı	Silhouette Series M Ma Projection Screen
	2020 BX98 Type	Search Value	SHere dia Lor ector With 3000 Lum al Pr Universal Ceiling Mou
	TEMF300	Panasonic	ETEMF300 Pr Filter
	1-HAD100	Panasonic	Carrying Har DLP Projector
C	BEN/100	Panasonic	ET-RFV10 Ator Filter
	lick Funnel Clear Filters	Runco	DLP Vic ⁴ ctor
10		Panasc	Click for New Search
	M90357	Panasc Right	Click to Pesume Search
	PS TR60 PS TR70	3M Night	3Mi; ½ Portable Tripod Projection Screen PS
	PS 1R/0	3M	3Mil 1/2 Portable Tripod Projection Screen PS 3Mil 1/2 Wall Mount Projection Screen PS WB50
	PT50LCZ70	Panasonio	50" Projection TV
	PT56LCX70	Panasonic	56" Projection TV
	PT56LCZ70	Panasonic	56" Projection TV

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.

Bid Contacts Dashboard Products Visio Designer Purchasing Purchase Orders Project Manager Project Calendar Project Tim Client: Douglas Residence Rooms: Conference Room COPY Bid AV and Security System Rev 2 Model Search My Products DELETE Search by Category Product Same Product Model Model Model Description Click to Create Audio Product Model Model Model Model Model Add New Audio Click to Create a New Product Add New Hospitally 9-Series TH-37PR9U 37' Plasma TV Audio Click to Create a New Product Click to Create a New Product Hospitally 2-Plasma TV Hospitally 9-Series TH-37PR9U 37' Plasma TV Headshomes/Earphones Click to Select an Existing Product Click to Select an Existing Product Hit 2PX70U Panasonic Hit 2PX70U 42' Plasma TV Headshomes/Earphones Products by Category 8. Manufacturer Kanasonic Vise TH-42P2200U 42' Plasma TV Products by Category 8. Addo Systems Sony Coporation Vise TH-42P220U 42' Plasma TV TH-42PX20U 42' Plasma TV Products by Category 8. Adu	BidMagic Enterprise MultiUser Edition -	-v8.0.0.0						
Bid Contacts Dashboard Products Visio Designer Purchasing Purchase Orders Project Manager Project Calendar Project Tim Client: Douglas Residence Rooms: Conference Room COPY Bid: AV and Security System Rev 2 Model: Search My Products DELETE Model: Search by Category ROOM R	File View Bids Print Settings	Templates Import/Export	QuickBo	oks Online Prod	lucts Project	Video Tutorials Register	User Guide	
Cliert: Douglas Residence Rooms: Conference Room COPY Bd: AV and Security System Rev 2 Model: Search My Product DELETE MODEL MFGNAME DESCRIPTION COPY Z5 & 35 mm Audio Cables AVA and Cables AVA Receivers Accessories Audio Classing, Cooling & Heating Audio Classing, Cooling & Heating Audio Video Audio Video Audio Video Click to Create a New Product Click to Select an Existing Product Click to Select TH42PX10U Panasonic Viese TH42P2300U 42* Plasma TV TH42PX30U Panasonic Viese TH42P2300U 42* Plasma TV TH42PX30U Panasonic Viese TH42P2300U 42* Plasma TV TH42PX30U Panasonic Viese TH42P230U 42* Plasma TV TH42P230U TH42	📓 Clients 🎧 Rooms 👸	Bid Settings	Folder	Job Folder	Refrest	n 🛛 🛺 New Bid 🔀	Duplicate Bid	
Bid: AVand Security System Rev 2 Model: Search My Products DELETE Bid: AVand Security System Rev 2 Model: Search My Products DELETE Bid: AVand Security System Rev 2 Model: McGentary Control (Control (Contro)) Click to Controt (Control (Control (C	Bid Contacts Dashboard Pro	oducts Visio Designer P	urchasing	Purchase Orders	s Project M	anager Project Calendar	Project Time	
MODEL DESCRIPTION Colspan="2">MODEL DESCRIPTION Addo Addo Colspan="2">Addo Colspan="2">Addo Colspan="2">Addo Colspan="2">Addo Colspan="2">Addo Colspan="2">Addo Colspan="2">Addo Colspan="2">Colspan="2" Colspan="2" Colspan="2" <th cols<="" td=""><td>Client: Douglas R</td><td>Residence 🔹</td><td>Rooms:</td><td>Conference Roon</td><td>n</td><td></td><td>COPY</td></th>	<td>Client: Douglas R</td> <td>Residence 🔹</td> <td>Rooms:</td> <td>Conference Roon</td> <td>n</td> <td></td> <td>COPY</td>	Client: Douglas R	Residence 🔹	Rooms:	Conference Roon	n		COPY
Search by Category # 25 & 3.5mm Audio Cables # Addios # Avk Receivers # Addios # Arcleaning. Cooling & Heating Add New # Accessories # Click to Create a New Product # Add New TH-37PR9U Panasonic Hospitality 9-Series TH-37PR9U 37* Plasma # Addio # Addio # Addio # Addio # Audio Click to Create a New Product TH-42PH10uKA Panasonic TH-42PH10uKA 42* Plasma Display # Addio Video Endio Video Endio Video Endio Video Endio Video Endio Video Endio Video @ Addio Video Click to Select an Existing Product TH-42PX10U Panasonic TH-42PX30U 42* Plasma TV Headels/Earsets Endio Product Endio Product TH-42PZ200U Panasonic Viewa TH-42PZ30U 42* Plasma TV B Microphones Sci-H13350 Selectra Click to Select Products by Category & Manufacturer Panasonic Viewa TH-42PZ30U 42* Plasma TV B Addio Preamplifier Sci-H13350 Selectra Sci-H13350 Selectra Viewa TH-42PZ30U 42* Plasma TV B Addio Preamplifier Sci-H13350 Selectra Sci-H13250 Selectra Viewa TH-42PZ30U 42* Plasma TV B Addio Preamplifier	Bid: AV and Security	y System Rev 2 🔹	Model:		Search My I	Products	DELETE	
25 & 3.5mm Audio Cables 2-Vay Radios 2-Vay Radios Avdicevieres Accessories Audio /Video Click to Create A New Product Click to Select Audio /Video Audio Parasonic Users TH-42PX70 Parasonic TH-42PX70 Parasonic TH-42PX70 Parasonic Viers TH-42PX70 Parasonic Viers TH-42PX70 Parasonic Viers TH-42PX800 Par	Secret by Cotegory			MODEL	MFGNAME	DESCRIPTION		
 AVV Receivers Avdicessories Air Cleaning, Cooling & Heating Audio Audio Audio / Video Audio / Video Distribution Click to Create a New Product TH42PH10UKA Panasonic TH42PH11UK 42* Plasma Display TH42PX75U Panasonic TH42PX75U Panasonic TH42PX75U Panasonic TH42PX75U Panasonic TH42PX77U Panasonic TH42PX70U Panasonic Click to Select an Existing Product TH42P280U Panasonic Viera TH42P280U 42* Plasma TV TH42P280U Panasonic Viera TH42P280U 44* Plasma TV TH42P280U Panasonic Viera TH46P280U 44* Plasma TV TH4		ROOM					E	
 Accessories Air Cleaning, Cooling & Heating Audio Audio Audio / Video Audio / Video Distribution Audio Electronics Click to Create a New Product Click to Select TH42PH11UK Panasonic TH42PH11UK 42" Plasma DTV TH42PX75U 42" Plasma TV TH42PX75U 42" Plasma TV TH42PX75U 42" Plasma TV TH42PX75U 42" Plasma TV TH42PX70U 42" Plasma TV TH42PX70U 42" Plasma TV TH42PX80U Panasonic TH42PX70U 42" Plasma TV TH42PX80U Panasonic TH42PX70U 42" Plasma TV TH42PX80U Panasonic TH42PX70U 42" Plasma TV TH42P2700U Panasonic TH42P270U Panasonic TH42P270U 42" Plasma TV TH42P2800U 42" Plasma TV TH42P2800U 42" Plasma TV TH42P2800U 42" Plasma TV TH42P2800U Panasonic Viera TH42P2800U 42" Plasma TV TH42P2800U Panasonic Viera TH42P2800U 42" Plasma TV TH42P2800U Panasonic Viera TH42P280U 42" Plasma TV TH42P280U Panasonic Viera TH42P280U 42" Plasma TV TH42P280U Panasonic Viera TH42P280U 42" Plasma TV TH42P280U Panasonic Viera TH42P280U 45" Plasma TV TH42P280U Panasonic Viera TH42P280U 46" Plasma TV TH42P285U Panasonic Viera TH42P280U 46" Plasma TV TH40P285U Panasonic Viera TH42P280U 46" Plasma TV TH50P710UK 90" Plasma DispL Audio Framplifier Audio Framplifier Audio Framplifier Audio Framplifier Audio Framplifier Audio Systems AudioVideo Media AV Care Basteries Mation Hasina Audio Systems AudioVideo Media AV Care Basteries Audio System File AudioSystem File AudioSystem File AudioSystem File AudioSystem File Aud	2-Way Radios			Add New				
 Air Cleaning, Cooling & Heating Audio / Video Audio / Video Audio / Video Distribution Audio Electronics Cassette Players/Recorders Digital Audio Players Headphones/Earphones Headphones/Earphones Headphones/Earphones Headphones/Earphones Headphones/Earphones Speakers Speakers Panasonic Click to Select an Existing Product Click to Select Products by Category Sony Corporation Voice Recorders Audio Systems A	AV Receivers			TH-37PR9U	Panasonic	Hospitality 9-Series TH-37PR9U	37" Plasma	
 Audio Betteries Audio Panasonic TH42PH10UKA Panasonic TH42PX75U Panasonic TH42PX77U Panasonic TH42PX700 Panasonic Feransa TH42PX80042* Plasma Plasma Plasma Audio Plasma Plasma Audio Plasma Audio Plasma Audio Plasma Audio Plasma Click to Select an Existing Product TH42PX800 Panasonic Viera TH42PX800 Plasma Plasma Plasma Plasma Plasma Plasma Audio Plasma Plasma Audio Systems Audio Syste				TH-42P	Panasonic	42" Plasma HDTV		
 Audio / Video Audio / Video Audio / Video Distribution Audio / Video Distribution Audio / Video Distribution Audio Electronics Cassette Players/Recorders Digital Audio Players Headphones/Earphones Headphones/Earphones Headphones/Earphones Headsets/Earsets Microphones Speakers Speakers Sony Corporation Click to Select Products by Category Manufacturer Click to Select an Existing Product TH42PZ800U Panasonic Viera TH42PZ80U 42" Plasma TV TH42PZ80U 42		Click to Create		TH42PH10UKA	Panasonic	TH-42PH10UKA 42" Plasma Disp	olay	
 Audio / Video Distribution Audio Video Distribution Audio Electronics Cassette Players/Recorders Digital Audio Players Headyones/Earphones Click to Select an Existing Product Click to Select Products by Category Sony Corporation Voice Recorders Audio Systems Audio Systems Audio/Video Media BASESYS/KSU Batteries 		a New Product		TH-42PH11UK	Panasonic	TH-42PH11UK 42" Plasma Displa	ay and a second s	
 Cassette Players/Recorders Digital Audio Players Headphones/Earphones Headphones/Earphones Headphones/Earphones Headphones/Earphones Heiri Systems Speakers Speakers Sc-HTE350 Sony Corporation Voice Recorders Audio Systems Audio Video Media AudioVideo Media<			1	TH42PX75U	Panasonic	TH-42PX75U 42" Plasma TV		
 Digital Audio Players Digital Audio Players Headphones/Earphones Hi-Fi Systems Microphones Speakers Speakers Sc-HTE350 Sc-HTE350 Sc-HTE350 Sc-HTE350 Sony Corporation Voice Recorders Audio Preamplifier Audio Systems Audio/video Media Audio/video Media Audio/video Media Audio/Systems Audio/Systems Audio/Systems Audio/Video Media AUC are BASESYS/KSU Batteries 	- Audio Electronics			TH42PX77U	Panasonic	TH-42PX77U 42" Plasma TV		
Headphones/Earphones Headphones/Earphones Headphones/Earphones Headphones/Earphones Headphones/Earphones Hi-Fi Systems Microphones Panasonic Viera TH42P270U Panasonic Speakers Panasonic ScHT12350				TH42PX80U	Panasonic	Viera TH-42PX80U 42" Plasma T	v	
 Headsets/Earsets Hi-Fi Systems Microphones Speakers Panasonic SC-HTB520 SC-HTB520 Sony Corporation Voice Recorders Audio Preamplifier Audio Systems Audio Systems Audio Systems Audio Systems Audio/Nideo Media Audio/Nideo Media AudioSystems AudioSystems<				TH42PZ700U	Panasonic	42" Plasma TV		
 an Existing Product Hi-Fi Systems Microphones Speakers Click to Select Products by Category Sony Corporation Voice Recorders Audio Preamplifier Audio Systems Audio Video Media Audio Video Media Audio Systems Audio Sys				TH42P777U	Panasonio	TH-42P777U 42" Plasma TV		
In Histophones TH42P280U Panasonic Viera TH42P280U 42" Plasma TV Speakers Panasonic Viera TH42P285U Panasonic Viera TH42P285U 42" Plasma TV SC-HTE350 SC-HTE350 Products by Category Panasonic Viera TH46P285U Panasonic Viera TH46P285U 46" Plasma TV SC-HTE350 Sony Corporation Sc.HTE350 Panasonic Viera TH46P285U Panasonic Viera TH46P285U 46" Plasma TV Voice Recorders Audio Systems Audio Systems Panasonic Viera TH46P285U 46" Plasma DispL Audio/video Media Audio/video Media Panasonic Professional TH-50PF10UK 50" Plasma DispL H50PH10UKA Panasonic TH50PX5U Panasonic TH50PX75U 50" Plasma DispL BASESYS/KSU Batteries TH50PZ700U Panasonic TH50PZ700U 50" Plasma TV		an Existing Product					TV	
Speakers Panasonic Viera TH-42P285U 42" Plasma TV SCHTE350 SCHTE350 Products by Category & Sony Corporation Panasonic Viera TH-46P285U 46" Plasma TV Voice Recorders Sony Corporation Wiera TH-46P285U 46" Plasma TV TH46P285U Panasonic Viera TH-46P285U 46" Plasma TV Audio Preamplifier Audio Systems Audio/Video Media Panasonic Viera TH-50PF10UK Panasonic Professional TH-50PF10UK 50" Plasma DispL Audio/Video Media Audio/Video Media TH50PF10UK Panasonic TH-50PF10UK A50" Plasma DispL Audio/Video Media Audio/Video Media TH50PS75U Panasonic TH-50PX75U 50" Plasma DispLay TH50PX80U Panasonic TH-50PX80U 50" Plasma DispLay TH50PX80U Panasonic TH-50PX80U 50" Plasma TV Batteries TH50PZ700U Panasonic TH-50PZ700U 50" Plasma TV TH50PZ700U 50" Plasma TV								
 Panasonic Panasonic SC-HTE350 SC-HTE350 SC-HTE350 SC-HTE350 SC-HTE350 SC-HTE350 SC-HTE350 SC-HTE350 Sony Corporation Voice Recorders Audio Systems Audio/Video Media Audio/Video Media AUGIO/Medo Media AUGIO/Medo Media BASESYS/KSU Basterries 	· · · · · · · · · · · · · · · · · · ·		_					
SCHTESSU Products by Category SC-HTESSU SC-HTESSU Sony Corporation Manufacturer Voice Recorders Audio Preamplifier Audio Systems Professional TH-SOPF10UK S0" Plasma DispL Audio/video Media TH-SOPF10UK Audio/video Media TH-SOPF10UK BASESYS/KSU Panasonic Batteries TH-SOPZ00U	Panasonic	Click to Select						
Bony Corporation & Manufacturer Image: Sony Corporation Image: Theorem of the song term of te							-	
Image: Work of the seconders TH50PF10UK Panasonic Professional TH-50PF10UK 50" Plasma DispL Image: Audio Systems TH-50PF10UK Panasonic Professional TH-50PF10UK 50" Plasma DispL Image: Audio Systems TH50PF10UK Panasonic TH-50PF10UK 50" Plasma DispL Image: Audio Systems TH50PH10UKA Panasonic TH-50PH10UKA 50" Plasma DispL Image: Audio Systems TH50PX75U Panasonic TH-50PX75U 50" Plasma Display Image: Audio Systems TH50PX75U Panasonic TH-50PX80U 50" Plasma Display Image: Audio Systems TH50PX75U Panasonic TH-50PX80U 50" Plasma Display Image: Audio Systems TH50PX75U Panasonic TH-50PX80U 50" Plasma Display Image: Audio Systems TH50PX70U Panasonic TH-50PX70U 50" Plasma TV Image: Audio Systems TH50PZ700U Panasonic TH-50PZ700U 50" Plasma TV								
Audio Preamplifier Audio Systems Audio Systems Audio/Video Media Au		a manuacturer					-	
Audio Systems Audio Video Media AV Care BASESYS/KSU BASESYS/KSU Batteries Audio								
Audio/Video Media AV Care AV Care BASESYS/KSU Badsesys/KSU Care								
Image: AV Care TH50PX80U Panasonic Viera TH-50PX80U 50" Plasma TV Image: Batteries TH50PZ700U Panasonic TH-50PZ700U 50" Plasma TV								
BASESTSINSU	AV Care							
							v	
IH50P//50U Plasma TV								
BLU THEOD27711 Parameter TV	-							

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.

Model (required):	Favorite	wed	Inaclive	Add New	Image			Hoor Plan	Bes	ation
HTS		1							2	-
Description (requ	(bow	-					*		2	
DLP Video Projector									1000 Lan	
Supplier:				HEGA SPECE	Height	é Q	Width	Length:	Weight	
D&H Distributing			Mig Number: RS-1100	-	6.3		16	14	17	Copy Package
Category:			And the Party of t		Adolark	Package	Builder	S		
Video Projectors		39	Mig Name: Digtal Projection	1		olunik Pa			Save Product I	ielore addrig Uni
			A		F			Model	120000000000000	
			UPC			_		10011	ALC: NO.	
Features:					Qua	entry: 1	.00	÷	Defete Nov	e A Hove :
900x1080 native record	uson DUP light engine feat	turing Digital Proje	ections powerful SuperOr	ryk teo nakogy for bright.	QTY		UNIT	MODEL	MEG NAME	DESCRIPTION
pratme, high definition i		1999 (1997)		1		inner	A	MODEL	NEO MARE	0cpcrar inte
					2000	ower Se				
Automatical Index	1. 2217 2217	0000000000000	generati.			1.00		AVR507	Balk	1 Surrour
Equipment Lab	or User Inver	ntory Quick				2.00	1.00	AXS	Middle Atlant.	
and the second sec						1.00	200	MAX500		
Ex. Rate	Iba Cod		🖂 Tay	t Equip					Panamax	
Ex. Rate		10000 1000 0000 000 000 000 000 000 000	Sell Price:	i Equip		1.00		CT1000	Crestron	Color Wall
	\$4,995.00	%Murkup 100.00	Sell Price: \$9,990.00			1.00	ee pr	СТ1000 ВКТ700	Crestron Speakercraft	Color Wall Speaker Br
MSRP:	\$4,995.00 MAP/Wob:	100.00	Sell Price: \$9,990.00 Cost	54		1.00 1.00 1.00	ee pr ee	CT1000 BKT700 LX123HST13G.	Crestron Speakercraft Stewart Film	Color Wall Speaker Br Luxus Mod
MSRP: \$9.990.00	\$4.995.00 MAP/Wob: \$0.00	100.00 Cobie/Hard:	Sell Price: \$9,990.00 [285 \$35.00	5al \$75.00		1.00 1.00 1.00 2.00	ee pr ee	CT1000 BKT700 LX123HST13G TR700	Crestron Speakercraft Stewart Film. Speakercraft	Color Wall Speaker Br Luxus Mode Ceiting Spe
MSRP: 89.990.00 Order Phase:	\$4.995.00 MAP/Wob: \$0.00 Buy City:	100.00 Coble/Hard: Unit:	Sell Price: \$9,990.00 [285 \$35.00	Sel \$75.00 Rack Units		1.00 1.00 1.00	ee pr ee	CT1000 BKT700 LX123HST13G.	Crestron Speakercraft Stewart Film	Color Wall Speaker Br Luxus Mod Ceiting Spe
MSRP: 89.990.00 Order Phase: Frish	54.995.00 MAP/Wob: 50.00 Buy Qty 1	100.00 Cable/Hard: Unit: es v	Sell Price: \$9,990.00 Cost \$15.00 F	281 \$75.00 Rack Units: 0(\$)	1.	1.00 1.00 1.00 2.00	ee pr ee pr ft	CT1000 BKT700 LX123HST13G TR700	Crestron Speakercraft Stewart Film. Speakercraft	and the second se
MSRP: 82.990.00 Order Phone: Finah ~ Shipping:	54 995 00 MAP/Wob: 50 00 Buy Qty: 1 Total Installed P	too.co Coble/Hard: Unit: es v	Sell Price: \$9,990.00 East \$35.00 F Hide Price	Sel \$75.00 Rack Units	1.	1.00 1.00 1.00 2.00 100.00	ee pr ee pr ft	CT1000 BKT700 LX123HST13G TR700 CAT5e	Crestron Speakercraft Stewert Film. Speakercraft Belden	Color Wall Speaker Br Luxus Mod Ceiting Spe Category 5
MSRP: \$9.950.00 Order Phase: Freeh	54.995.00 MAP/Wob: 50.00 Buy Qty 1	too.co Coble/Hard: Unit: es v	Sell Price: \$9,990.00 Cost \$15.00 F	281 \$75.00 Rack Units: 0(\$)	1.	1.00 1.00 1.00 2.00 100.00	ee pr ee pr ft	CT1000 BKT700 LX123HST13G TR700 CAT5e	Crestron Speakercraft Stewert Film. Speakercraft Belden	Color Wall Speaker Br Luxus Mode Ceiting Spe Category 5
MSRP. 89.190.00 Order Phase Finish ~ Shipping: \$0.00	s4.955.00 MAP/Wob: 50.00 Buy Oty 1 Total Installed P \$10.657.50	too.co Coble/Hard: Unit: es v	Sell Price: \$9,990.00 East \$35.00 F Hide Price	281 \$75.00 Rack Units: 0(\$)	1.	1.00 1.00 1.00 2.00 100.00	ee pr ee pr ft	CT1000 BKT700 LX123HST13G TR700 CAT5e	Crestron Speakercraft Stewert Film. Speakercraft Belden	Color Wall Speaker Br Luxus Mode Ceiting Spe Category 5
MSRP. 89.190.00 Order Phase Finish ~ Shipping: \$0.00	s4.955.00 MAP/Wob: 50.00 Buy Oty 1 Total Installed P \$10.657.50	too.co Coble/Hard: Unit: es v	Sell Price: 59.990.00 [285 515.00 F 100 100 100 100 100 100 100	281 \$75.00 Rack Units: 0(\$)	1.	1.00 1.00 1.00 2.00 100.00	ee pr ee pr ft	CT1000 BKT700 LX123HST13G TR700 CAT5e	Crestron Speakercraft Stewert Film. Speakercraft Belden	Color Wall Speaker Br Luxus Mod Ceiting Spe Category 5
MSRP: 32.990.00 Order Phase Fran - Shipping: \$0.00 Product Url: Ope	s4.955.00 MAP/Wob: 50.00 Buy Oty 1 Total Installed P \$10.657.50	too.co Coble/Hard: Unit: es v	Sell Price: 59.990.00 [285 515.00] F 14ide Pri Option System:	281 \$75.00 Rack Units: 0(\$)	1.	1.00 1.00 1.00 2.00 100.00	ee pr ee pr ft	CT1000 BKT700 LX123HST13G TR700 CAT5e	Crestron Speakercraft Stewert Film. Speakercraft Belden	Color Wall Speaker Br Luxus Mod Ceiting Spe Category 5
MSRP: \$2.190.00 Order Phase: Finish ~ Shipping:	s4.955.00 MAP/Wob: 50.00 Buy Oty 1 Total Installed P \$10.657.50	too.co Coble/Hard: Unit: es v	Sell Price: 59.990.00 [285 515.00] F 14ide Pri Option System:	Sel \$75.00 Rack Units: 0[\$] Roo Lawel	1.	1.00 1.00 1.00 2.00 100.00	ee pr ee pr ft	CT1000 BKT700 LX123HST13G TR700 CAT5e	Crestron Speakercraft Stewert Film. Speakercraft Belden	Color Wall Speaker Br Luxus Mode Ceiting Spe Category 5

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.

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.

System:		Quantity	1.00	÷	ADD
ídeo		~	Add Package		•
Model: HTS	;			1	
Description:	DLP Video Proje	ector			
	🗹 Favorite		cast Update	e: 11/1	7/201
Mfg Number:	VS-1100		MEGA SPECS		_
Mfg Name:	Digital Project		Select Image		0
Supplier:	AVAD	Target ADD	Clear Image		
Category:	Video				

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.

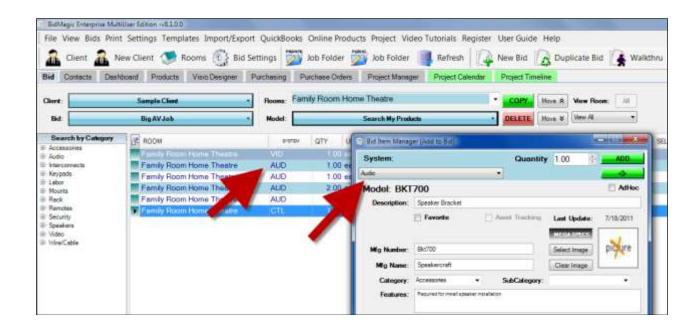
BidMagic Enterprise MultiUser Edition -v	/8.0.0.0								
File View Bids Print Settings	File View Bids Print Settings Templates Import/Export QuickBooks Online Products Project Video Tutorials Register User Guide								
Clients 🔝 Rooms 👸	Bid Settings Job	Folder 💈	Job Folder	Refresh	New Bid	Duplicate Bid			
Bid Contacts Dashboard Proc	ducts Visio Designer Pu	urchasing	Purchase Orders	s Project Ma	anager Project Calend	lar Project Timeli			
Client: Douglas Residence Rooms: Conference Room COPY									
Bid: AV and Security	System Rev 2 🔹	Model:		Search My F	roducts	- DELETE			
Search by Category	ROOM		MODEL	MFGNAME	DESCRIPTION	ES			
 2-Way Radios AV Receivers 			Add New TH-37PR9U	Panasonic	Hospitality 9-Series TH-37PF	R9U 37" Plasma			
Accessories Air Cleaning, Cooling & Heating Audio	Click to Create	1/	TH-42P TH42PH10UKA	Panasonic Panasonic	42" Plasma HDTV TH-42PH10UKA 42" Plasma	a Display			
Audio Audio Audio / Video Audio / Video Distribution	a New Product		TH-42PH11UK TH42PX75U	Panasonic Panasonic	TH-42PH11UK 42" Plasma I TH-42PX75U 42" Plasma T				
Audio Electronics ⊡ Cassette Players/Recorders			TH42PX77U TH42PX80U	Panasonic Panasonic	TH-42PX77U 42" Plasma TV Viera TH-42PX80U 42" Plas				

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. 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.

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

Sid Contects D	ashboard Ploducts Visio Pu	rchasing	Rooms in Bid All Rooms			
Dient:	Malibu School District	•		Room Name		
Bd	12321			Family Room Home Theatre Current Room Description		
Search by Category FAVORITES "Budget	FROOM	(and a second	Guest Bedroom T Orange Order 1 - Bedroom	This system is the utimate in entertainment. Beautin audio technology. The large screen will theater seating is made with the finest leafter	Tprov nowerful cinema experience a	
*Cabling	· Fomey Room Home Thronton	WO		25	Type a descript	ion
Accessories Audio	Family Room Hom Coleatre	VID			here or select	-
AV receiver Camerica	Eamily Room Home Theatre	AUD			favorite below	la -
Climate	Family Room Home Theatre	AUD			-	-
Control Flatscream TV	Eamly Room Home Theatre	AUD				
Interconnects	Eamly Room Home Theatre	AUD				
Keypads Labor	Family Room Home Theatre	GUA		Copy My Room Description		Sine
Mounte	Eamly Room Home Theatre	CTL	My Room Descriptions			
Mounto & Racks Pro Audio	Family Room Home Theatre	CTL	Title Hore Theater System		Charten Dates	
Rack	Guest Bedroom 1	GIV	Favortic Roon Desc	totiona		•
Remotes	Guest Bedroom 1	VID.		timate in entertainment. It includes the latent video		1
Security	Guest Bedroom 1	VID		s screen will provide a powerful cinema experience rea includes apell check.	e and the theater seating is made with th	<u>*</u>
Security Devices Sensors	Guest Bedroom 1	AUD	Section and the second			
Speakers	Guest Bedroom 1	AUD		4	Save favorite room	
TV/Monitor Video Electronica	Change Order 1 - Bedroom	VID			escriptions or scope	
Video Projectors Infre/Cable	Change Order 1 - Bedroom	SEC		of	work here. This area cludes spell check.	
	<	-			111	1
	Labor: 🖂 AutoCale 🛞			Carcel Save		
	Previne: \$1,870.00 C	able/Ha				

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.

CONNELS LANSIE	boant Products Visit Designer	-second eg	Purchase Orders	Project Manager		Contract of the second second	14		Change
	Sample Client •	Room:	Audio System		filt item Manap	er (Kalit Imer)			and a lot of
Ser	phe Products calculate labor •	Model.	3	Search My Pro	TR700		de laar to anteol is attleve	et Podut	
unch by Calegory	R HOOM	autor	GTY UNIT	MPG NAME	Model:		TR700		-
saories	60	VID-	100 ap	Rumat	Description	Cielling Speakers			
convecto.	Family Roam Home Theatre Family Roam Home Theatre	AUD	100 ee	Mag		E Favatio	Generativy: 2.00	383	
1978 ·	Family Room Home Theatre	ALD	1.00 es	Panamaz	Room	Family Room Home Treatm	•10	Contractory of	1000
	Family Finant Hanse Doubles	AL0	2.00 pr	Speekerson"	System	Auto	•	Selectionage	100
	Family Room Home Theatre	AUD	1.00 ee	Middle Atlent	Mg Number:	18700		Clear troope	
ins.	Family Room Home Theatre	CTL	1.00 es	Nes	Mg None:	Speakerorat		Line of the line o	
					Fedures	Received Letting Lipscher, for hy Surfaces, IT Up in Cooker Ells	Dotre Teener witt Recov	n un Hapett, Javieta	(JAPAR)
					feetal Note:		Dotte Tweeter with Hecdy	n un Hagnes, partaça	APPEC 1
Cable					inital Note:	Later		nun Hapun, parasa	prise.
					Instal Note: Equipment Order Phan Tex Unit Cost:	Latter e • Madoop % Soll Pri	ian ¹ 2 Tau Davie		ap.
					Instal Note: Epugement Order Plan Ter: Unit Chat: 311	Later e. • Natup % Sail Pri 102.00	2 Tes Dany		1819- 10 20
					Instal Note: Epipement Order Plan Ten Und Cost: 211 Und 1	Luter: 	ill Tax Equip state co	Cas	ane so co Sel
					Install Note Ergapsent Order Plan Ter Und Cost Sti Und Cost Shipping	Later e. • Natup % Sail Pri 102.00	ill Tex Spap sate S30 07 Cable/Neet	Set Sati 91.00	80P. 80.00

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.

New Contact 🥻	tings Templates Import/Expo Client 🕐 Rooms 🚯 Bis	Settings	Previe	w 💯 Job Folder	" 🖟	New Bid 🔞 Duplicate Bid 🔓	Welkthru		*	
Bid Contexts Destributed	Producto Visio Designer	Purchasing Pasena	Entertainm	ENSORIAL INCOMENTATION AND A	Project Calendar	Project Timeline COPT. Have A View Room:				
Bet Hum	n Thuater System -	Model		Search My Products		DELETE Mone 8 Extensioner P	um. + 🗨	-	-	
Search by Calegory	ROOM	81751	GTY UNIT	MESILINE	MODE.	DESCRIPTION.	SELLPRICE	752 1	TUTAPRICE	100
FAVORITES	Entertainment Room	VID	1.00 es	Digital Projection	HTS	DLP Video Projector	\$9 990 00	11	\$9 900.00	
Cobing	Enfectedment Flours	VID	1.00 es	Stewart Filmacroan Carp.	LX123HST13G38	Losun Model A - 123" Moto-grad S.	51 499 00	100	E1 499 D0	1270
*PackagesHone Theater	Entertainment Room	AUD	1.00 es	Bak	AVE507	7.1 Surround Processor	\$2,995,00	13	\$2,995.00	17)
Tackages/MultiRoom Audio Packages/Security	Entertainment Foom	AUD	1.00 am	Panamax	MAX500	Surge Protector	\$119.00	100	\$119.00	
Accessories	Entertainment Room	AUD	4.00 pr	Speakercraft	TFI700	Ceiling Speekers	\$293.90	- 92	\$1,105.RD	121
Audio	Entertainment Room	AUD	1 00 ==	Middle Attantic	AXS	Equipment Rack System	\$320.00		\$129.00	1771
Internanieuts Keypatik	Entertainment Room	AUD	1.00	Inhouse	PWTV	Prewre TV outlet	\$100.00	10	\$100.00	13
Labor	Entertainment Room	AUD	1.00	Inhouse	PWDate	Prewre date poit	\$90.00	1	500.00	COTT D
Nourte	Entertainment Room	AUD	2.00	Inhouse	PWSpk	TV dutlet white	\$50.00	10	\$100.00	85
Flack Namulas	Entertaitment Rours	CTL	1.00 не	Niles	Intel	Intelicontrol System	ST 199.00	100	\$1,199,00	141.
Screena	Entertainment Boom	CTL	1 90 0C	Belden.	GAT5e	Category 5e network cab	\$0.14	E	\$21.60	10
Security .	Room Tota		-				\$16,655,04		\$17,578.20	

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.

BidMage Enterprise Multilliar G File Wew Bids Print Sett	Contraction of the second s	port (QuickBox	oks C	mline Products Project	Visio Des	gner Video Tub	orials Regi	ster Usa	r Guide He	φ			SCHOOL ST	1.0
New Contact 📠 (Client 🥵 Rooms 🚯	Bid Se	ttings		Preview 💯 Job Fold	er 🏐 J	ob Folder	24	New Bi	d 🔓 Dup	licate	Bid 🖌 Wi	ikthr	v	
Bid Contects Deshboard	Producto Vielo Designer	Pyr	prients	Pun	these Orders Project Me	roger F	Project Calendar	Project Tw	eline						
Chert 0	ann go Mishop	+	Roome	Ajde	Symmetry			COPY	Hore A	Vew Room	Al	1		1	
Bet Home	a Thumber System	-	Model:		Search My P	roketa	- le	DELETE,	Hose ¥	New Mu		¥			
Search by Calegory	ROCH	warps	QTY .	UNIT	MPS NAME	MODEL	DESCRIPTION			SELLPHICE	-	TOTALPHICE	Cox.	10144.1891	1.
FAVORITES *Sudget	Entertainment Room	VID	1.00	-	Digital Projection	HTS	DLP Video Pro	ector.		\$8,491.50	12	\$8,491.50	10	\$618.25	5 1
"Cabling	Enterteinment Soom	VID .	1.00	98	Stewart Filmacreen Corp.	LX123H	Luxus Model A	- 123" Moto	E borun	\$1,521.50	1	\$1,521.50	141	\$255.0	0
*Packages Finne Theiter	Entertainment Room	AUD	-1.00		58K	AVR507	7.1 Surround P	tocessor		\$1,696.60	10	\$1,696.60	1第	\$212.5	0
Teckages/MultiPoon Audio Teckages/Security	The Entertainment Roam	AUD	1.00	86	Panamas	MAX500	Surge Protecto	1		385.00	18	\$85.00	4	521.2	5
Accessives	Entertainment Room	AUD .	4.00	pr .	Speakercraft	TR700	Celling Speake	ra .		\$283.90	10	\$1,135.60	97	\$425.0	0
Audio	Entertainment Soam	AUD	1.00	-	Middle Atlantic	AKS	Equipment Rac	k System		\$321.30	16	\$321.00	190	\$255.0	01
Interconnects. Revoals	Entertainment Room	AUD	1.00		Inhouse	PWTV	Prewere TV out	let		\$0.00	100	\$0.00	- 191	50.0	0
Labor	Entertainment Room	AUD	1.00		Inhouse	PWDeta	Prewere data p	pett		\$68.00	10	\$65.00	101	\$0.0	0 1

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.

Bid Contacts Das	Statistics and statistics of the state		re field Cho	1000		Purchase Idio Syst
Bid: Av	vesome Home T	-		Mo	del:	
Search by Calegory	T ROOM	Field Cl	hooser	×.		MODEL
FAVORITES TNone TNone Accessories Audio Electronics Consumer Electronics Interconnects Keypads Labor Mounts Rack Remotes Security Speakers Video Electronics Video Video Electronics Wire/Cable	Security System Audio System		able able Cost able Cost epth eatures inish inishHr eight istall IFG Number hase rewire rewire rogram Cost hipping upplier rim		1 00 1 00 1 00 1 00 2 00 1 00 1 00	Install Labe HTS 400/1M AVR507 MAX500 TR700 AXS Intel No system

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.

Labor:	AutoCalc	Œ	Adjust+/-	Total	Так				Tax Disc		
Roughin:	\$75.00	Cable/Hard:	\$0.00	\$0.00	12	Equipment:	\$954.60	Discount:	(\$200.00)	Total Equip:	\$754.60
Trim:	\$100.00	Program:	\$0.00	\$0.00		Taxable Eq:	\$954.60	Tax Rate:	0.08625 .	Sales Tax:	\$82.33
Finish:	\$300.00	Design/Mgmt:	\$0.00	\$277.96						-	
Install;	\$0.00	Shipping:	\$0.00	\$0.00	西			1		Total:	\$3,139.89
Subtotal:	\$2,025.00	Total Install:	\$0.00	\$2.025.00		Delivered:		V Sold:	5/13/2013	APPR	OVED JOB

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.

🔮 Bid Se	ettings - CC Te	st - Sample Clie	ent			
General	Rooms in Bid	Systems in Bid	Job Number	Sales Pipeline	Payment Plan	
Curre	ent Job Status Number Job Numbe 308 Job Number Ap APPROVED	r:	Inlock 5/2019 🗐 👻			

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)

-10	anc.				-		To	8			
		Douglas	lesidence		ŀ				Dougtas Res	idence	-
		8enedict Ca	viyon Home		F				ladiad	ti i	
RC	юм	QTY	MODEL	SELLPRIC	•		80	ром	QTY	MODEL	SELLPRIC
	Media Ro.	2.00	TR700	\$199.00				Bedroom 1	1.00	intel	\$1,199.0
	Media Ro	1.00	HTS	\$9.990				Bedroom 1	1.00	liviel.	\$300.0
	Media Ro.	1.00	AVR507	\$1,588				Bedroom 1	1.90	Intel	\$300.0
	Medie Ro.	1.00	AXS	\$954.60							
	Media Ro.	1.00	MAX580	\$139.00							
	Media Ro	5.00	TR700	\$199.00							
	Media Ro.	6.00	400/1M	\$24.00	21	- 33					
	Media Pio.	1.00	TVO	\$24.00							
	Master B.	1.00	HTS	\$9,990							
	Master B.	1.00	AVR507	\$1,588							
	Master 8_	1.00	AXS	\$954.60							
	Master B.	1.00	MAX500	\$139.00							
	Master B_	5.00	TR/80	\$199.00							
	Master B_	6.00	400/1M	\$24.00							
	Moster B.	1.00	TV0	\$24.00							
	Master B.	1.00	HTS	\$9.990							
	Master B_	1.00	AVR507	\$1,588							
	Moster B.	1.00	AXS	\$954.60							
		x.04	CLUCK MARK	44.00.00	1921						

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.

Bid to Duplicate:	Douglas Remodel
New Bid Name: Doug	glas Remodel Revision 1
Associate to:	Sample Client
© upda ☑ Reset Bid	ated products, pricing, labor ated products, pricing, labor Statuses and Dates on new bid ler Statuses on new bid
	Folder contents of original bid e original bid se Save

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.

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.

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.

	Postern dir NAXXXX Posteds your AV equipment from damaging lightning and power line surges. Courseleed	
4 pr	Calling Speakers Speakercraft RVX00 Result dang speakers high qualityspunt 5-11/ Potposytem Core Wode with Rubber Burnores, 1 ¹ Jouil Cooled Sill Dane Tweeter with Nectomur Magnet, patroder patriet	\$1.556.00
	Area Labor & Equipment Total	\$19,787.17
CHA	NGE ORDER 1	
Pris is	a list of the changes approved in client meeting on Jan, 12, 2013	
1	42" Plasma HOTV	\$2,158.33
215	Pransmore/coTH-42P Aerosome unaving experience in a highly raised Plainsa TV: Plays at HD formats. 1080/720p Calife surt medity.	
ন	Pronoscinic TH-42P Awaptore viewing experience in a highly value Places TV Plays at AD-burnas. 1000/122p Calle surt ready. Surgos Profescinor Pronosmics AMAX500 Present your XV reoptimethors damaging lighting and power line surgex. Sourcebed	<\$139.00

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.

New Bid Name: Douglas Remodel Revision 1 Associate to: Sample Client Make copy with	Bid to Duplicate:	Douglas Remodel	1
Make copy with	New Bid Name: Doug	glas Remodel Revision 1	
 original products, pricing, labor updated products, pricing, labor Reset Bid Statuses and Dates on new bid Reset Order Statuses on new bid Copy Job Folder contents of original bid 	Associate to:	Sample Client	
 updated products, pricing, labor Reset Bid Statuses and Dates on new bid Reset Order Statuses on new bid Copy Job Folder contents of original bid 	Make copy v	vith	
 Reset Bid Statuses and Dates on new bid Reset Order Statuses on new bid Copy Job Folder contents of original bid 			
 Reset Order Statuses on new bid Copy Job Folder contents of original bid 	🐑 upda	ted products, pricing, labor	
Copy Job Folder contents of original bid			
	📄 Reset Bid	Statuses and Dates on new bid	
Deactivate original bid			
	Reset Ord	er Statuses on new bid	

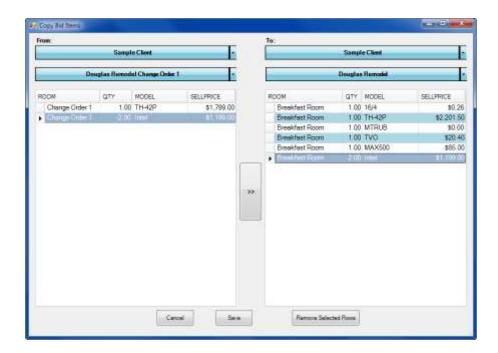
Create New Change Orders Plus Merge All Changes into a Single Bid

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.



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)

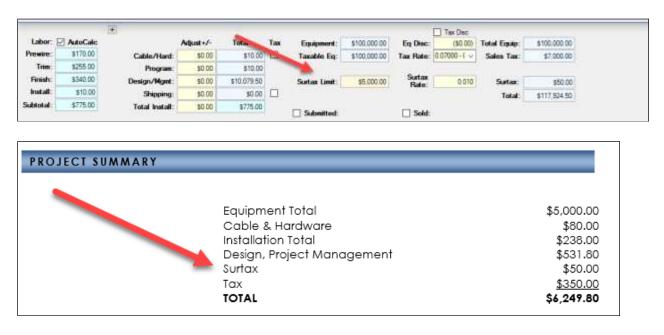
Some states charge separate Use (Usage) tax based on the cost of a product rather than the selling price. This does not mean you want to 'use' the tax feature and in most states, you should set this choice to OFF. In the Default Settings or Bid Settings Menu click Activate Tax Basis to turn this feature 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.

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.

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:	AutoCale			Adjust+/-	Total	Tax				Tax Dec		
Roughin	\$1,147.50		Cable/Hard:	\$0.00	\$268.00	12	Equipment:	\$15,773.75	Discount:	(00.00)	Total Equip:	\$15,773.75
Trim	\$977.50	View	Program	\$0.00	\$722.00		Taxable Eq:	\$16.041.75	Tas Rate:	0.08628-1 +	Sales Tax	\$1.383.60
Finish:	\$2,231,25	More	an/Mont:	\$0.00	\$2,114.00							
Install:	\$5.00	Labor	Shipping:	\$0.00	\$200.00	25					Total	\$24,837.60
Subtotal	\$4.376.25	-	recal Install:	\$0.08	\$4,376,25		🗄 Delivered:		2 Sold:	4/15/2013	T APP	ROVED JOB
	[- Cueton										
		Phas		00.00								
		1'mgrann		PD (20								
		c		60.08								

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.

BallyIngs:					.R.I		
Would y Phase?	na like to set the	e sell prize to \$2.20 fr	a attactively	division y latter on	the		
			1	in i	tim		
Labor	2 Antolac	🖂 Curron Phases			Adjust +/-	Total	T
Lober: Rougher:	AnoCale 170.00	Curron Proses	wrot to	Cable/Hard	Adjust +/-	Total 88.00	The
	and the second second second	Contraction of the second second			put put Destant & total spath		Th (R)
Roughin:	\$78.00	Service:	800.0014	Cable/Horit	80.00	\$1.00	D R
Floraghies Trim	\$78.00	Service:	800.0014	Cabler/Hard Program	#0.00 #0.00	\$0.00 \$0.00	10 mm

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.

Labor:	AutoCalc	Custom Phase	es		Adjust+/-	Total
Roughin:	\$0.20	Service:	\$0.00	Cable/Hard:	\$0.00	\$0.00
Trim:	\$0.00	vice Type	\$0.00	Program:	\$0.00	\$0.00
Finish:	\$0.00	AutoCal	CS OFF	Design/Mgmt:	\$0.00	\$277.96
Install:	\$0.00	Hourly To		Shipping:	\$0.00	\$0.00
Subtotal:	\$0.00			Total Install:	\$0.00	\$0.00

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.
- 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.)

Labor	AutoCalc	Custom Phases	1000		Adjust+/-	Total	Tax				Tax Dac		
Roughin	\$1,147.50	Service:	\$11.00 Cal	ble/Hard:	\$0.00	\$268.00	团	Equipment:	\$16,773.75	Discount	(\$0.03)	Total Equip:	\$15,773,75
Trim	\$977.50			-	\$0.00	\$722.00		Taxable Eq.	\$16.041.75	Tax Rate:	0 08625 -	Sales Tax:	\$1,383.60
Finish	\$2,231,25	Fudge Fa	ctor Des	gn/Mgmt:	\$0.00	\$2,114.00							
Install.	\$0.00	Adjustme	ents	Shipping:	80.00	\$200.00	四					Total:	\$24,837.60
Subtotal	\$4,376.25	1012500000	Tot	tal Install:	\$0.00	\$4.376.25		🛅 Delivered:		Sold	4/19/2013	- APPE	IOVED JOB

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.

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.

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.

BidMagic Enterprise Multil	Jser Edition -v8.5.0.3							
File View Bids Print	Settings Templ	ates Import/I	Export QuickBoo	ks Online	Products Project	Video Tutorials Re	gister User Guide H	lelp
New Lead 🔒	Client 💮 Bi	d Settings 🐧	🗭 Rooms 🧕	Preview	Job Folder	Job Folder	Refresh	🙀 Clear Filters
Bid Contacts Dasht	word Products	Visito Purc	hasing Purchase	Orders	Project Manager C	alendar Timeline	1	
Mew All Edg. View My Ex	da Client	Ed Al Dat	es 🗸 🗸					
D All Active				Expor	Excel Delcavate Bid	Delete Bid		
0 Al Active			RID	108.2	NOTES	STATUS	- DESCRIPTION	steer
2 A8 Bids 3 A8 Service			- Charleson	ALC: NO.	NOTES	SIAIO	- Deschir Hon	-
8 My Fevortes - D.G.O 99 All Inactive	Filter Bids	lobe	New! S				Arresta	
X No Action			Date F	ange	Has 14 jobs coming		Created	Jab Completed
B Bid Created D Sold Needs Approval	Service, I	MANDA REPORT	_			100000	Hold - Needs Resoluti.	 Job Completed
E Jobste approved to start	Enterpris	17. CONTRACTOR 1	332	332		B - Bid	Created	
F Job in Progress 3 On Hold - Needs Resolution!	addition	al job	331	331	- Completed bill	B - Bid	Created	
H Job Completed	status	es.	330	330		J - Job	ready to be invoiced	
Job ready to be involced D Paid in Full		and a second	329	329	e.	the stand of the s	Created	
P1 Order Request			328	328	- Lost Bid			
P2 Order Approved P3 On Order			326	326	a second s	B + Bid	Created	
Z Job Lost or Dead			327	327			Created	
Thomas Newman	New Bid Cal test	23	325	325		Control Control	Created	
Thomas Newman	PO test 1232		322	322		B - Bid	Created	
Thomas Newman	new bid 12333		321	321		B - Bid	Created	

BidMagic Enterprise N	/ultiUser Edition -v8.5.0.3				
File View Bids P	rint Settings Templates Imp	ort/Exp	ort Quick	Books Onlir	ne Online Pro
New Lead	🔒 Client 👸 Bid Settings	1	Rooms	Rrevie	w 🙀 Job
Bid Contacts Da	ashboard Products Visio Des	signer	Purchasir	ig Purcha	ise Orders Pi
View All Bids View M	Ay Bids Client Bid				
0 All Active	~			Б	port Excel
CLIENT NAME	BID NAME		BID #	JOB#	NOTES
Thomas Nowman	123210010010		307	307-	
Click to	Awe Right Click for	m	306	306-	Builder has 3 r
Select	Bid Navigation Menu		317	317-	
	Bid .	1	332	332-	
T nas Newman	BidId		309	309-	
homas Newman	ru test 12345		327	327-	
Thomas Newman			310	310-SEC	
ample Quint	Bid		331	331-	
Thomas New	Client		315	315-	
Thomas New	Job Settings		316	316-	
Thomas New	Sales Pipeline		324	324-	
Thomas New	Job Folder		323	323-	
Thomas New	Delete Selected Bid(s)		304	304-	Job in Progres
Thomas New	Make Selected Bid(s) Inactive		305	305-	
Pinnent load over	nowbid		210	010	

					utorials Register User Guide H	
New Lead	Client 💮 Bid Settings 🔇	Rooms	Preview 💋	Job Folder 20 Jo	b Folder 📑 Refresh 🌱	Clear Filters
Bid Contecta Des	hboard Products Visio Purch	esing Purc	hase Orders Projec	Manager Calendar	Timeline	
Men Al Enter View My	Side Client Bid Al Date					
D Al Active	South Treatmanent Contraction Contract		Export Excel	Defetuate Tid	Br	
			, have been a second		1	
CLIENT NAME	BID NAME	80 #	JOB# NOTE	/	STATUS - DESCRIPTION	STAGE
10 I			and the second se			
Thomas Newman	Awrence Trinster Bid	333	A CONTRACTOR OF A CONTRACTOR OFTA CONTRACTOR O	whe coming up	8 - Eid Created	Job Completed
Thomas Newman	Service Ticket 222	334	Deactivate		G - On Hold - Needs Resoluti	Job Completed
Sample Client	Bid no hours aldo	332	Highlighted		8 - Bid Created	and a post of the post of the post of
Sample Client	BM Jen	331	Bids	and bill	B - Bid Created	
Thomas Newman	no lebor bid3343	530	22668		J - Job ready to be invoiced	
Thomas Newman	no hours 1	329	329-		B - Bid Created	
		328		Bid		

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.

ackup Location	
:\ProgramData\BidMagic\AutoBa	ackup\Backup_20110831103944.t Browse
Backup Now	Close
	Close

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.

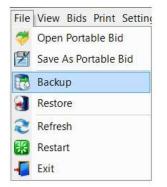
Backup Utility

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).

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



		100	Acres 1		
You mu	st be an A	dminist	rator to ru	in this ta	sk.
				0	к

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

	C. Interest Interesters	
States and States	East Defined	
Backup		
Switch to Restore	Geven all TH PC SQLEEP WITH	
	logn. Lange	
	Count.	de alter
	Textine	C Still
and the second second	Reflace -	
BidMagic, 2010	Lim	i jet Belinge 2
	Backup Switch to Restore clok tare	Backup. Switch to Flestor click term

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.

ackup Successfu	
BidMagic succe	essfully backed up.

Advanced Method

The Advanced method will require some additional 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 <u>status will be highlighted in green</u>, 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.

lagic)			
kar Beston Correction			
Ser-m			
KENTH PC STALEXPILESS			
Lapo			
bidnapic			
Faceword			
130m/04		didue.	Qinvect
Deater			
Bitfrigs	3.53		
			đ.,

Davis	
idflege) Iackup (Hastana Contraction)	
100-000 Long and a	
BdMage Beckup	
🕼 SQL beckus BidMaps (B.	
To Comparized Behapit Million 2018 221514 has	lenti
Tenglaten	
Ell Zu backup Rollingic teoplates	
From: C1/ProgramData/BieMagie17ampNates	inter and a second
backup folder	
Ti C'PisewaCata	Taxa .
Dec. 220	

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

Backup Success	ful 📃 🔀
BidMagic suc	cessfully backed up.
	ОК

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

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.

File View Bids Print	Settings Templ	ates Import/Export QuickE	ooks O	nline Products Project Video Tutori	als Register User Guide Help				
E Bid Products		Rooms 💮 Bid Settings Vac Designer Purchasio	<u>e</u> , •	review 🕎 Job Folder 🔯 Job	Folder Refresh				
Paginate Pr	5	oarch:		in MODEL + Search	Clear				
ODEI View Ad Ho	c Products	NFG NAME		DESCRIPTION	FEATURES	SUPPLIER	BUY QTY		Ì.
19 Walkthru M 40	ne 6650125 CT1000 HTBranze	Speakercraft Beden JUL Professional Creatron Samsung	yo resi	o not use Pag our searches a ults will only sh vel searches r searc	are very slow! now a single p	Searc	h Гор	\$40 \$24 \$0 \$0 \$87 \$2,005 \$329 \$516 \$516 \$0 \$0 \$0	
HTGold	HTGeld	Digital Projection		reprise a manufer in technique - Galarie	- Lour top or the one home theate per-	Innovat		\$0.	
HTS	RS-1100	Digital Projection	.00	DLP Video Projector	1920x1050 native resolution DLP k.	New supplier	1	\$9,990	100
Install He	Install He	Inhouse		Hours - Installation Labor	General Installation Labor Hilled b.	Inhouse	1	\$0.	13
Install Lobor	Invital Lebor	Inhouse	-	Install Labor	General flat rate Installation Labor.	Inhouse	1	50	16
	NC3400	Nies		Intellicontrol System	Control your entire home theatre sy.		1	\$1,100	
	KPS101	Audio Access	.48	Music System Keypad	Simplicity and elegance. This reno	Audio Access	3	50	
KPS101		Stewart Famacreen Corp.	68	Luxus Model A - 123" Motorized S.	The Luxus Model A an electronical.		1	50	15
KPS101 LX123HST13G38	203077					diam'r a lland		\$0	
KPS101	MAXSOODBS	Panamax	68	Surge Protector	Protects your AV equipment from d.	Cabicol	1		1.2
LX123HST13G38			e5	Surge Protector disfisedf	Protects your AV equipment from a.	Cepida	1	\$0.	10

Contraction and the second sec	board Products Visk	Designer Pr	incheering	Purchase 0	riters Project Manag	er Celenzter	Timoline	
Aurt .	Thomas Newsall		Парена	Audio System	n		COPY. Mov	A Vew Room
Bet Am	reason Name Theater System		Model:		Search My Prob	48	· DELETE Move	s & Mex.A
Search by Calepory	ROCH	ermu	Q1Y	HODE.	Ploat Product Search	6		
Tione	Secondry Textors	411	1.00	hand Labor	MODEL	MEGNUME	DESCRIPTION	CATEGORY
cusacrive	Audio System	VID		HIS	Prost Same	ar uniore	Description	Chiedon
469	Audio System	AUD		400/1M				
udo Bectorica		1000			+ 600.1540	GE Security	Concerned & Surveying Parent	Speakers
lonsumer Electronica tercomenta	Audio System	AUD		AVR507	CT 1990	Constant	Color Wall Insteamed	Keypath
erpada	Audio System	AUD		MAX500	HTS	Been	DLP Vieles Projector	Viteo
stor	Audio System	AUD	2.00	TR700	In stall also	lebour	leated Labor	Labor
eunts ack	Audio System	OUA.	1.00	AXS	PWTY	Internet	Preside for TV safet	WestCalds
lamotes.	Audio System	CTL.	1.00	(vital)	SCB	Infrance	Bauis Service Coll-Biblie	Labor
ecirity	Audio System	CTL	1.00	No system	12345	12345	Auding space test	
petitions					104	Spraws	Speaker table 4 conductor	Wing/Calche
ideo Ideo Bectionica					1992	Horeyael	Qual PIR remain dataster	Security
Le Cable					400111	Micrate	RCA 1 Merer native	Variamada
10.572.52					4791AD	Soyo Group	Cigetal 4791AB 477 LCC TV	Video Electronia
					\$528	Honeyvell	Wieleni Securty Keyped	Security
					\$9,748-01	OE Seturter	Supertus 2018 UCD Alphenumen	Contraction of the second s
					ALVR601	BBH	7.1 Summaria: Pronesses	Audio
					409707	SMC .	AVRIOT AV Receive	Container Steamania
					625	Middle Artenco	Epupment Reck System	Flack
					BK(7700	Speakerstell	Speaker Bracket	Acceptor two
					CATS: CONTROL SECST	Daller	Category Se nationsh valide	Www.Cable Anda
							Consumer Calling Subsection	DERVE AND
					HESV1008	Saray	HESV1000 Skirky Player HER0500 Weilers Canvet Sou	Video Electronico Audor Electronico
	()				Install 10	Detroung Internet	Hours	Audio Chargenca
	Lobor: 🖂 AutoCalo			and+/- To		Niles	Intelligence of System	Devoter
	Presere: \$595.00	Ceble/	and the second	80.00	epster	Audio Access	Muss Symen Keypart	Keygada
	A DESCRIPTION OF THE OWNER OWNER OF THE OWNER OF THE OWNER OWN				MAX500	Paraman	Burga Pretantor	Antazatrian
	Tree: 685.00		grow;	90.00	VIRA	Chail the	Large Low Prolie File Panel Have	

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.

View All Bids (Multiusers Only) (Pro/Ent Feature)

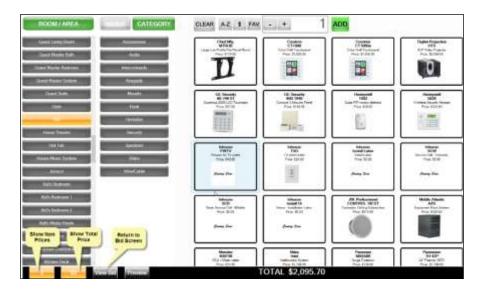
Multiusers with Permission to Select All Bids have the option to View All Bids or just view their own Bids. Check the View All Bids to view all available Bids. (subject to your assigned multiuser privileges) Uncheck it to view only your Bids. If multiple locations or departments are partitioned in the 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 alternate touchscreen view 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.



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.

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.

ROOM / AREA	MANUE	CLEAR A-Z \$ FAV	Bannard Rissonth	
Deck	*Budget	B&K AVR507 71 Sumurid Processor	ADD PRODUCT ONLY	AGE ADE Panal Mour
Deck 1	*Cabing	7-1 Sumound Processor	PRODUCT	ACKAO
Deck 2	*Packages/Home Theater		ADD Same SODUET	
Deck/Hot Tub	*Packages/MultiRoom Audio		ADDPT	
Den	*Packages/Security	Crestron CT1000	Digital Projection RS-1100	Digital Projection HTGold
Den/Office	Accessories	Color Wall Touchpanel	DLP Vieled Projector	Home Theater Package - Gold
Dining Room	Audio			(Licous)
Dining/Kitchen	Interconnects Keypads	Contraction of the second seco		Care -
Dish Location	Mounts	GE Security 60-746-01	GE Security 600-1040	Honoywoll 1992
Elevator	Rack	Superbus 2000 LCD Touchped	Concord 4 Security Panel	Qued P1R motion detector
Entertainment Triceri	Remotes			5.
Entry	Scroons	(* * * * *	_1 ++ //	
Equipment Rack	Security	Honeywell 5828	Inhouse Install Labor	Inhouse SCW
Equipment Room	View Bid Preview	Wireless Fixed English Keyped	livetall Labor	Service Call - Warranty

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.

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)

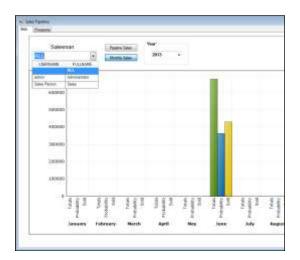
View by location, manufacturer and more. Send filtered selections to Excel for editing or printing.

Sales Pipeline (Pro/Enterprise Feature)

BidMagic provides graphs for your sales pipeline for Contacts and Clients. The Clients bar graph tracks 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)

BID MENU

New Bid

Select an existing 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.

U	Jsers Admir	istrator ▼	Share With		user	
Со	Client Name	Bid Name	Can Select	Can Update	Can Delete	ls
•	Douglas Reside	Benedict Canyo				
	Douglas Reside	First Bid				
	Douglas Reside	Test 555				
	Douglas Reside	Bid777				
	Douglas Reside	Bid007				
E	3 Jean Kim	new bid				
	Douglas Reside	System Bid				
	Douglas Reside	Ed's new bid				
	Douglas Reside	ed new revision				
	Douglas Reside	new price				
	Alex 12345	Test Bid 12345				
•						•

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.

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.

System:			Quantity	1.00	ADD	
Model Serv	ice Call - F	Rillable			AdHo	
Description:	Insert Descripti		le Here		and the second second	
Description.	Favorite	ion of mode	Asset Tracking		0.00.0000	
		1	Asset macking	Last Update:	6/4/2013	
	-			MEGA SPECS	N	
Mfg Number:	Service Call - E	Billable		Select Image	picture	
Mfg Name:	Inhouse			Clear Image	ے لیے ا	
Category:	Labor	•	SubCategory:	-	•	
Features:				1		
				1		
Install Note:	Insert additiona	al notes for :	service tech here. 🚽	-		
Equipment Lab	or					
Enter Labor Time	in Hours		Enter Labor Flat Ra	te		
Prev	vire: 0.0	0000		<u>Cost</u>	<u>Sell</u>	
T	rim: 0.0	0000	Install:	\$0.00	\$0.00	
Fin	ish: 0.0	0000	Program:	\$0.00	\$0.00	
Service	HR: 1.0	0000				
			Total Labor:	\$90.00		
Apply changes t						
Apply changes t This item only						

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			_	
Style (Template) Standard Executive Narrow Custom 1 Custom 2 Custom 3 Custom 4 Custom 5 Custom 6	Show/Hide Prices and Details Company/Client Header Mfg Name Model Features Line Item Price Show \$0.00 Prices Labor Total on Line when Equip = 0 Room/Area Subtotals Breakdown Labor and Equipment Combine Labor and Equipment	Closing Document:	All Cover 1 Templates\BidProposal\Opening Br gs Templates\BidProposal\Scope Terr	 × × × ×
O Custom 7	 Include Cable/Hardware Breakdown Labor by Phases Product Images Product URL System Summary Show Optional Total Total Items Only (No Rooms) 	Preview in Word Previe	w as PDF	Close

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.

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

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

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 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.

© 2020 BidMagic Corp.

\$0.00

\$125.00

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 THE PROPOSAL

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

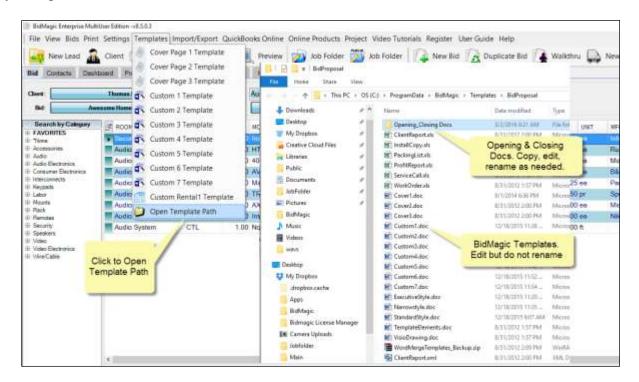
You can use our sample documents found in the Opening_Closing Docs folder or create your own with Word 2007-2016 to print and assemble as part of your client proposal. Before printing, browse to Word documents you wish to add at the beginning of the proposal and at the end. If you make it a practice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

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 or share as a PDF in MS Office.

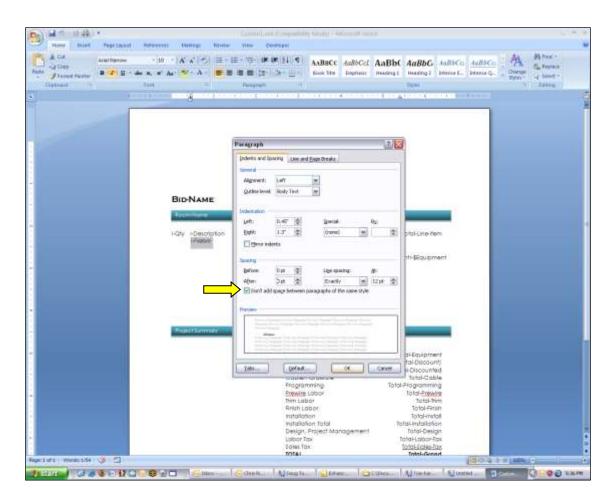
Preview as PDF

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.

Label Manager	r			- 0 ×
Preset:	BidMagic AV	•		
Container:	PRINT PREFERENCE	CES 🗸		
CURRENT I	LABEL	DEFAULT TEXT	SOURCE	FI 📤
Audio \	Video	Custom 1		
Securit	y	Custom 2		
Custom	3	Custom 3		
Custom		Custom 4		
Custom	15	Custom 5		E
Custom	16	Custom 6		
Custom	17	Custom 7		
Custor		Custom Rental		
Executi	ve	Executive		
Narrow		Narrow		
Standar	-	Standard		T
•				4
	Reset to Default	Labels		
	Container Level	Preset Level	Save	Close
[



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.

Report Courts and Compatibility Model - Advanced Many renors Mailings Reven View Destinger Namer PCF	
Column AF Hashenstein - a →	A C Pasitian Designation
AUDIO VIDEO PROPOSAL	8979
Page Setup	• •
Dation Dation S <th< td=""><td></td></th<>	
Bystrati Landgrape	
Pages Sulliple pages: Normal W	

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.

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.

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.

efault Settings Ro	ons Systems	Sertal Interna	tonal Updates Job Phases Pay Period Automaker			
Tax Flate Q.07000			Decimal Places for Quantity 2 v Default AutoLink Package to ON Activate AutoLink 2 Levels Use SubCategory Organize by Systems	Shered Path Management Matikuaars: Sotup a shared drive on a different PC a users can access this same path. Set Richal Path for Al Users Set Global Path for Al Users Auto Save to Job Folder Templates Job Folder Chilaren Public Documents Belflage		
			Activate Price Level	PO Folder Children Public/Documents/BioMage		
Labor	Cost	Sell	O Unit Cost @ Sel Price			
Prewice	\$40.00	\$85.00	Use Inventory Feature Enforce MAP	Reset All Users' Patha		
Trim	\$40.00	\$85,00				
Finish	\$40.00	\$85.00	Sound ON			
		- Children	O Definit1 C Definit2 C Definit3			
	Cost	Sell	Text			
Design/Mgmt	0.00	0.00	User Pasawords (Initial and Reset)			
			Default Pasaword BidMagic			
Cost-Price Adjustm	Managet	Serve I				
 Martup Markup 	Manu contro Per multius	io diu.		Word Format:		
				Daplay as Recurring Daplay as Optional		

Include Hidden items in Room/Area subtotals and Total Equip or in Cable/Hard

BidMagic includes lots of flexibility as to how you show pricing in the Client Bid. Hidden items in a bid will not show as line items. These radio buttons allow you to choose to include those fees within the Room/Area subtotals and the Total Equip or include those fees in Cable/Hard. (Misc parts)

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 - $100 \cos t = 200$ Profit. Then $200/100 = 2 \times 100 = 200$ % 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.

Word Format Selection

You can choose to use either word.doc or word.docx formats. Keep in mind that when you search for documents in print preferences, only those documents from your chosen format will be displayed. So if you have a favorite opening or closing document and you change this choice, we recommend that you open that document and perform a save as to the chosen format so you can easily locate it.

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.

last Se	tings Roone System	i in an existing bid, open the bid and click on Bid Properties. P [Reenal] International]
AUD SEC CTL UT TEL	the System you wish Aude Video Video Secutly Control Lighting Teleptone	to View/E di Move & System Name: Auto ID: Auto Deinte: Auto Save
	4	AutoLeik & System Flotain System Assignment Flotain System Assignment from Master Produc

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 BidMagic User Guide © 2020 BidMagic Corp. All rights reserved Page 98 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.

which Settings Sta	us Setens I	Rental Menat	ortal Streepron Updates Jub Phases						
Tax Rate 0.00025 •			Docenal Places for Guardity 2 *	Huttusers: Setup users can access Set Individual P	Panel Path Macagement Mathueens, Sintya a shared drives on a different PC so all area can access this same path. Set folkida Path in User Harager # Set Global Path for Al Users				
C Labor Tax	ON		T Require Approval for Job	Terpidez	Ratio Documenta BidMagio Templetes	a			
C VAT/HST	at Bassis (Live:	Test)	📳 Use SubCategory 🕼 Use New Word Merge Templates	Public Job Folder	Socurrents Bellings Publish False	9			
Labor	Cost	Sel	 Hele Prices in Walkthru Mode Organize by Systems 	Job Folder	Public Documenter BidMage	J			
Pression	\$40.00	\$85.00		PO felder	When Puble Documents Billinge	1			
Tran	\$42.00	\$85.00	Unit Cost in Sel Proce		Reset All Users' Patro				
Finish	840.00	\$85.00	Use Inventory Feature		HESE AN UDOLS FROM				
	Cent	Sel							
Design/Nget	5.00	10:00	Sound ON [2]						

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

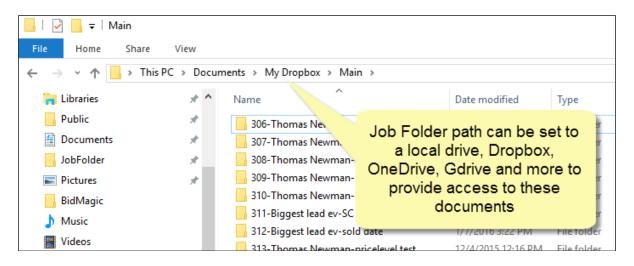
We recommend setting the template path as C:\Users\Public\Public Documents\BidMagic\Templates. BidMagic will add the BidProposal subfolder so the resulting path will be C:\Users\Public\Public Documents\BidMagic\Templates\BidProposal. If you customize your paths, when you run a BidMagic software update, 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.

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 paths 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.

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.

Bid Monitation Current Job Status: Bid Deated		Labor	Labor Diff	culty	10	Jobste (Sent tu Votalievi) Client Addresses.				
Bd None: CC Test		1	Cont Sel			Company Nam	w: [
Sales Person:	Rich Rahi	Pressive	\$40.00	\$85.00		Akkess: 3	0350 Marring Vew Dr			
Sales Phone:	(310) 614-5064	Finish	840.00	\$85.00		City: W	Aulto:	State: CA		
PM Name:	Roh Riel/	3	and a second second			Country:		2m 90265		
Pricing							310 925-1111	1000		
Labor Tax OFF						Hoble: U	IS-Canada - [010	614-5064		
O VAT/HST						timat 0	loug®wildcahanch			
Tax on Cest Ba	T STORE STORE					Contact Perso	an: Stave Raymer			
Direction	00000	Design/Mgnt %	0.00		00	A	ob Ste Map	The Own Advisors.		
O Deplay as Rec	uring 🛞 Deplay as Optional					Description of W	Vork			
						Conner#s				

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.

Opportunity Pipeline					Status			
Target Budget:	\$19,837.79				Gented Submitted	\$7.5/2019	and a second	208
Expected Gree Date: 3	5/2015 10+	Last Follow-up:	3/ 5/2015	- III-	Sold	\$/ 5/2010 5/ 5/2019	Sec. 1	
Slage: Inte	ended -	Last Result:		4	inactive			
Probability:	100	Next Follow Up:	9/ 5/2015	D +	🗌 Lock All Chars	pro (Persone	(B)	
Owner: Ro	ih Reli 🗸 🗸	Next Action:			🖂 Job II Approve	C C	1 (Q+)	
					Sent To Quick	hooks		
Client Notes					Dert Certer			
Gate code at site re 1836					Eapy Link to	and the second s	Open Clerk	
					the Automation of Contraction			
					Resident		9- 5-2010 05-40	PB .
Opportunity Notes for the Bid/Job					Approved		1: 5-2019 (6.¢	PM

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.

eral Rooms in Jo	b Job N	umbe	Sales Pipeline	Payment Plan		
🔿 Date 💿 Statu	JS					
1st Payment:	10	%	\$23.08	4/19/2018	•	Upon signing
2nd Payment:	25	%	\$57.69	4/19/2018		Upon wiring completion at the site for the project.
3rd Payment:	65	%	\$149.99	4/19/2018		Upon completion
4th Payment:	0	%	\$0.00	4/19/2018		
5th Payment:	0	%	\$0.00	4/19/2018		
Final Payment:	0	%	\$0.00	3/30/2017		
Gran	d Total:	Γ	\$230.76			

Payment Plan (Pro/Enterprise Feature)

You can setup a payment plan with up to 6 payments and the due dates in Bid Settings/Payment Plan tab. You can enter dollar amounts or percentages. Choose specific dates or stage or completion for the due date. 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

BidMagic User Guide © 2020 BidMagic Corp. All rights reserved Page 103

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.

User Manager								- 🗆 🗙
Select a User to Vew or Edit USERNAME	FULLNAME	ACTIVE	EMAL	14	Add New User	Datum Uner		Seve Close
admin	Administrator	2	nch@ladmage.c		Profile			
Soles	Admoutator Scott Stevens		seles((bidreg))		Unorsame adres Full Name Adverse day Password	Awr •	Phone 305-595-5850 Email intri@bidmagc.com	Active Attive Ban Software Updates Can Solat AF Bals Can Update AF Bals Soft Coloris Soft Coloris Soft Coloris Calendar Calendar Calendar Calendar Calendar Calendar Calendar Manage Ordering/Parchasing

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.

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.

BidMagic Ultimate Enterp	rise MultiUser Edition -v8.1.0.35						
File View Bids Print	Settings Templates Impo	ort/Expor	t QuickBo	oks Onli	ne Produ	cts Projec	t Video T
🚂 New Lead 🔒	Client 👸 Bid Settings	1 R	ooms 🧕	Preview	v 😥	Job Folde	r 💋 Jo
Bid Contacts Dash	Doard Products Visio Des	signer F	ourchasing	Purchas	se Orders	Project N	Manager
View All Bids View My Bi	ds Client Bid						
0 All	✓ All Locations			•	Expor	t Excel	Delete
CLIENT NAME	BID NAME	A BID #	JOB#	STATUS - I	ESCRIPTIO	N	NOTES
Power Search		0.0 %		0.000	200111110		
Sample Client1	Home Theater System	310	310-	B - Bid C	reated		
Tim Burdon	Hospital Board Room Syste	Bid			leeds Ap	proval	
Sample Client1	infocomm				eated		Urgent
Mike Henry	Mikes Bid	Clien			to be Inv	oiced	
Test new lead 0821	new bid 2 0821		ettings		eated		
New lead 730	New Bid for New lead 730	Job F			eated		These ar
new lead 730a	new lead 730a	Time	line		eated		
Sample Client1	New Test bid 0719	Delet	e Selected Bi	d(s)	e Ready		
Sample Client1	NewerName	Proje	ct Manager		eated		
Sample Client1	NewNameForthis	335	335-	B - Bid C	reated		
Test Contact	Phase Printing Test Bid	372	372-	B - Bid C	reated		

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

BidMagic Ultimate Enterprise M	ultiUser Edition	-v8.1.0.35				
File View Bids Print Sett	ings Templa	ites Import/Export	QuickBo	oks Online Product	s Proje	ect Vide
New Lead 😹 Del	ete Contact	Z Edit Contact	🏠 Op	en in Outlook 💶	Email	Contac
Bid Contacts Dashboard	Products	Visio Designer Pu	rchasing	Purchase Orders	Projec	t Manage
0 All Contacts	•					
NAME	TYPE	PHONE	EMAIL			ADDRES
🛛 new						
Ben Newhall	Lead	(410) 764-5209	bnewha	ll@polkaudio.com		
Brand New Contact	Lead					
New Big Deal	Lead					
New lead 730	Lead	(800) 598-5861	s@sr.co	im		100 Ma
New lead 730	Client	(000) E00 E001	co	m		100 Ma
new lead 730a	Client	Client Manager				btaddre
Once Again new Contact	Lead	Show Bids on Dashboard				

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.

Email Client	New Bid	lew Service	Schedule Appointment
Contact Type: To Shipping Address			
Client Name:	Tim Burdon		
Address:	123 Main Stl		
City:	Eureka	State:	CA
Country:	US	Zip:	91559
	(630) 962-0096	Fax:	
Mobile:	630-456-7890		
Contact Person:	Teddy Hoosier		
Email:	teddh@gmail.com		
Notes:	Add notes here.		

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.

Price Level (Pro/Enterprise Feature)

You can manage different Price Levels that can be assigned to Clients and 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.

Detabase Connection Manage	£	
	Stop SQLEXPRESS	Restart SQLEXPRESS
Sample Connection String		
Amint Security Info-False; User 7	D-BidMagic; Pasaword-(pwd); Data Source-10	SQLexpress: Database-BidMagic:
Connection Type		
Connection String	Use default Use alternate	
[°] Use Web Service		
and the second		
Stop SQL Express service	on BidMagic cut	
Stop SQL Express service	on BidMagic exit	

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 doc or docx format. If you choose docx, be sure to download the latest templates from our support page. Custom 1 is our favorite template with space at the top to create your own header and add your company logo. 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.

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 customizable format, with blue bar headers, space for your header and logo.

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.

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 or DOCX. This allows users to add or delete the data fields within the templates. Different instructions are listed later for older version templates. If you select docx, you may need to recreate all of the templates and docs in that format as they will not always merge together properly.

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.

and the second se	View				
ightarrow = ightarrow end arrow This	PC > OS (C:)	+ ProgramData > BidMagic > Templ	ates > BidProposal >		
Libraries	10	Name	Date modified	Type S	ize
Public	1	Opening_Closing Docs	1/2/2016 9:21 AM	File folder	
Documents	1	E ClientReport.ds	8/31/2012 2:00 PM	Microsoft Excel 97	20 KB
JobFolder	1.1	InstallCopy.xls	8/31/2012 1:59.9M	Microsoft Excel 97	27 KB
Pictures		PackingList.ids	8/31/2012 1:58 PM	Microsoft Excel 97	28 KB
BidMagic		ProfitReport.xis	8/31/2012 1:58 PM	Microsoft Excel 97	40 KB
Music		ServiceCall.ds	8/31/2012 1:58 PM	Microsoft Excel 97	25 KB
		S WorkOrder.xls	8/31/2012 1:57 PM	Microsoft Excel 97	21 KB
Videos		Cover1.doc	9/1/2014 6:36 PM	Microsoft Word 9	1,941 KB
wavs		Cover2.doc	II/31/2012 2:00 PM	Microsoft Word 9	2,097 KB
Desktop		M Cover3.doc	8/31/2012 2:00 PM	Microsoft Word 9	2,440 KB
My Dropbox		Custom1.doc	12/18/2015 11:38	Microsoft Word 9.,	60 KB
.dropbox.cache		Custom2.doc	12/18/2015 11:40	Microsoft Word 9	62.KB
		🖬 Custom3.doc	12/18/2015 11:44	Microsoft Word S	60 KB
Apps		Custom4.doc	12/18/2015 11:47	Microsoft Word 9	63 KB
BidMagic		Custom5.doc	12/18/2015 11:49	Microsoft Word 9	50 KB
Bidmagic License M	anager	Custom6.doc	12/18/2015 11:52	Microsoft Word 9	61 KB
Camera Uploads		Custom7.dec	12/18/2015 11:54	Microsoft Word 9	61 KB
Jobfolder		ExecutiveStyle.doc	PROTECTION AND AND	A Martin Martin Martin	_60 KB
Main		Marrowstyle.doc Te	mplate Backups	are stored here	AZ KB
Photos		Mi StandardStyle.doc	- AL		63 XB
		TemplateElements.doc	157 PM	Microsoft Word 9	260 KB
C Public		WisioDrawing.doc	1/31/2012 1:57 PM	Microsoft Word 9	3T KB
PurchaseOrders		WordMergeTemplates_Backup.zip	8/31/2012 2:09 PM	WinRAR ZIP archive	16,799 KB
RTI		ClientReport.aml	8/31/2012 2:00 PM	XML Document	34 KB

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.

	2 3 · Customil star (Comparisity Meda) - Microsoft Ward	- 3.3	r.
Hint:	Boart Page Lapout References Makings Review View Autobat		N/
Patte J B	ang Geme 10 1 A' A' C IE = IE - IE - IE - IE A Alberton Autocon Autocon Autocon Autocon Autocon Competence Com	Ha Find + Els Restace G Scient +	
Datheard -	Ford Program 11 Balance -	Tuting	-
-			
-			
-	CLIENTNAME: - (BIDNAME)		
	leginGroup:Roominto		
2	(ROCIMINAME)		
	sRoom-Description		
	HEnginDroupSynteminforxSystemNamexEaginGroup:/teminforx H-QtyUvits HOsecriptions H-ManufacturerMadeki W/Sekwas HEndGroupstemmforxEndGroupSysteminforx		
1	NArea Totale Labor NArea \$LabornEquipment NArea \$Equipments		
•	vEndCroup(Room(Wox		

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.

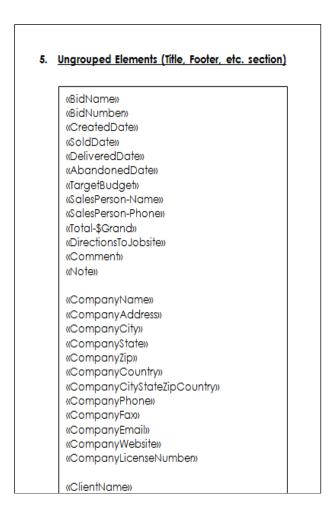
BidMagic Templates	Х
This template can be edited for your use. You can add logos, change fonts, color etc. You can also add text.	S,
Microsoft Word is required to make template changes.	
 This new template system allows users to add additional use fields to a document. 1. Open the <u>Template Elements document.</u> 2. Merge fields are organized into groups. Highlight a complete group to copy. 3. Paste the group into the template you wish to edit. 4. Now, you can delete elements in the group that are not needed. 	
OK Cancel	

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.



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 Smith
ClientAddress	10000 West First Street
ClientCity	Los Angeles
ClientState	СА
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

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.

@eginGroup:CompanyClientInfo»	«BeginGroup:CompanyInfo»
«CompanyName»	«CompanyName»
«CompanyAddress»	(CompanyAddress))
«CompanyCity»	«CompanyCity»
«CompanyState»	«CompanyState»
«CompanyZip»	«CompanyZip»
«CompanyCountry»	«CompanyCountry»
«CompanyCityStateZipCountry»	«CompanyCityStateZipCountry)
«CompanyPhone»	«CompanyPhone»
(CompanyFax)	(CompanyFax)
«CompanyEmail»	«CompanyEmail»
«CompanyWebsite»	«CompanyWebsite»
«CompanyLicenseNumber»	«CompanyLicenseNumber»
«SalesPerson-Name»	«SalesPerson-Name»
	«EndGroup:CompanyInfo»
((ClientName))	
(ClientAddress))	• <u></u>
«ClientCity»	«BeginGroup:ClientInfo»
«ClientState»	«ClientName»
«ClientZip»	(ClientAddress))
«ClientCountry»	«ClientCity»
«ClientCityStateZipCountry»	«ClientState»
«ClientPhone»	«ClientZip»
«ClientMobile»	«ClientCountry»
((ClientFax))	«ClientCityStateZipCountry»
«ClientEmail»	«ClientPhone»
(ClientContactPerson)	«ClientMobile»
	((ClientEax))

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 <<<Cli>ClientName>> added to an Opening Document. This opens up many creative options for user customization throughout these pages in the Proposal.

Dear-ClientName- Merge Field added to Word Doc
Thank you for the opportunity to perform this proposal for a complete audio video system design and installation for your new home.
Our company is a leading provider of high end residential AV systems. We have completed hundreds of installations in many homes in the area. We offer a wide range of the finest equipment available. Our technical team has over 35 years of combined experience.
We believe that design and installation of your new system should be an art and a science. Our design is based on a three-fold approach:

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.

L1								
	A	В	с	D				
1	East Coast AV Dist	tributors	Α					
2	Dealer Price List	July 2014	FV					
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								

This Spreadsheet below 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.

E1	E10 • : $\times \checkmark f_x$							
	А	В	С	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								
-								

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)

IMPORTING PRODUCTS WITH THE IMPORT WIZARD

Click on Tools/Import to open the new Import Wizard. Select the file to be imported. Column header details for the new data will be shown on the right and must be assigned 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. Once mapped, the fields will be highlighted in green. 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. Only mapped fields will be imported, which permits user control to include or exclude the selected data.

lect File to be Importe	d. nported. Then Highligh	t the BidMagic	Field for this data			
ick Map to BidMagic	iponea. Then trighingh	the blamagic	r leid for this data.			
	have mapped all desire	ed Fields to Bio	dMagic.			
ck Import to complete	the process.					
u can try Auto Map to	Map the fields which w	e can map for	you.			
uble Click on Mapped	field to remove the ma	apping.		Select File to be li	mported	
Global Import Option	ns: (Add to all items)					
MFGName:	Crestron	~	2	Copy Model to MFGNumber		
Supplier:	Crestron	~	Copy Description to Features		s	
			2	Tax Equipment		
Category:	Control	~		Retain Existing Image		
Markup:				Retain Existing Description		
				Retain Sell Price		
BidMa	gic Fields View all	fields		Fields to be Imported		
olayFieldName	DataType	^	UserFieldName	FirstRow	DbFieldName	
Description	String		Model	WPRI-DS	Model	
Features	String		MFGNumber	WPRI-DS	MFGNumber	
BuyQty	Int32		Description	Docking Station/Cha	1	
FinishHr	Double		Features	Docking Station/Cha		
	String		MSRP	\$75.00	MSRP	
GTIN	String		COST	\$1.00		
Height	String		MARGIN	0.15	Margin	
Height nfoSource				TP & Control	Category	
Height nfoSource sDiscontinued	Boolean		Category	En la Figura		
Height nfoSource sDiscontinued TaxAmount	Boolean Boolean		Hotpoint 1	Effective 5/04/12	-	
Height nfoSource sDiscontinued FaxAmount LastDateAddedToBid	Boolean Boolean DateTime		Hotpoint 1 Notes	File Name 'Crestron		
Height nfoSource sDiscontinued TaxAmount .astDateAddedToBid MAP	Boolean Boolean DateTime Decimal		Hotpoint 1 Notes Manufacturer	File Name 'Crestron Crestron		
Height nfoSource sDiscontinued FaxAmount LastDateAddedToBid MAP Margin	Boolean Boolean DateTime Decimal Decimal		Hotpoint 1 Notes	File Name 'Crestron	Supplier	
Height nfoSource sDiscontinued FaxAmount LastDateAddedToBid MAP Margin Markup %	Boolean Boolean DateTime Decimal Decimal Decimal		Hotpoint 1 Notes Manufacturer	File Name 'Crestron Crestron	Supplier	
Height nfoSource sDiscontinued TaxAmount LastDateAddedToBid WAP Margin Markup % Memo	Boolean Boolean DateTime Decimal Decimal Decimal String		Hotpoint 1 Notes Manufacturer	File Name 'Crestron Crestron	Supplier	
Height nfoSource sDiscontinued FaxAmount .astDateAddedToBid WAP Wargin Warkup % Mermo WFGName	Boolean Boolean DateTime Decimal Decimal Decimal String String		Hotpoint 1 Notes Manufacturer	File Name 'Crestron Crestron	Supplier	
Height nfoSource sDiscontinued FaxAmount .astDateAddedToBid MAP Margin Markup % Memo MFGName MFGName MFGNumber	Boolean Boolean DateTime Decimal Decimal Decimal String String String		Hotpoint 1 Notes Manufacturer	File Name 'Crestron Crestron	Supplier	
Height nfoSource sDiscontinued FaxAmount .astDateAddedToBid WAP Wargin Warkup % Mermo WFGName	Boolean Boolean DateTime Decimal Decimal Decimal String String		Hotpoint 1 Notes Manufacturer	File Name 'Crestron Crestron	Supplier	

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.

To import products into a Cloud installation of BidMagic, upload the csv file to the cloud and then import it. Uploaded files can be found in the webdrive or the downloads folder.

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.

Propert Quantity on Hand			- 🗆	×
 Prepare your Excel file for importing by adding "LocationCode", "Model" and "QtyOniHand to the first row of entries. Only use characters A-Z with no spaces or other characters in the record header. Save the file in CSV format. 		Select File to b	e împorte	ed
2. Select File to be imported. 3. Click Import to complete the process.		Import	.0	arcel
		Overwrite New Ant.) Adjust Cur	nert Ant.
	0%			11

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. Click on the menu for QuickBooks/Setup QuickBooks Connection. You can choose to send items with or without creating subitems for categories and manufacturers.

Click Run QuickBooks Connector. This runs a program named Coreobjx to establish the connection. Select Install or repair if prompted.

)uick!	looks Connection Setup)
This	is a one-time process to establish connection ar	id should not need to l	be repeated.	Please follow each st	ep completely.		~
1.	Confirm that BidMagic and QuickBooks are bo	th installed on this PC					
	QuickBooks company must already be setup	and contain accounts t	o connect wit	h.			
2.	Open QuickBooks company as administrator	n single user mode.					
	Run all available QuickBooks updates (found	under Help/ Update Qi	uickBooks Mer	ιu).			
з.	Click Preferences (Company Preferences) an	l verify the following s	ettings:				
1	tems & Inventory must be On.						
1	integrated Applications are not blocked (Here is	where you view existin	ig connections	s to Applications.)			
3	Sales Tax must be On. (Even if you don't charge	Sales Tax)					
đ	eave this QuickBooks company open. In BidMag	ic open a small propos	al and click Qu	iickBooks/ Send BidM	lagic Proposal to Q	uickBooks Estimate	E,
1	Click Always connect even if QuickBooks is not ru	nning.					
3	Click Connect as Administrator if that option app	ears.					
- á	Igree to verify connection.						
	Se prepared with information about what accour information during the first connection	ts you plan to assign (equipment, lat	bor and sales tax to.	You will be prompt	ed to enter this	
	Products and Labor from the proposal will be ser Carefully select Inventory or Non-Inventory for P						
	ou should see: Synchronization complete. All ite Customers/View Estimates then click Previous to				. Open QuickBooks	s company and click	ę.
	some UAC settings, or virus scan software may connection. Once established, the UAC should t			ction. Turn off UAC a	nd restart the PC,	then establish the	ŝ
10	- Water - Address	Run Quick	Books Con	nector			
	oup Bid items (default)			Contraction of the		OK Tarra	1
2 A	ply Category Manufacturer Item Subitem Heirarchy	UAC GB.A	oct Settings	Force End		OK Canto	-

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'**.

BidMagic User Guide

© 2020 BidMagic Corp.

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. We recommend you setup your shortcuts to BidMagic and QuickBooks to always 'run as administrator' for best results.

Apply Subitem Heirarchy to Organize 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.

Jick Books		les Guick Books Demo Bil	MACHE Commo CHIM	Browse
INVALUE AND			UNIX-HEREINOA-I-YA	Browse.
aming Cor	wention Discussion	ame/Number		-
	Tope vening	ame/Number		-
Non Inve		¥.		
	Account		-	
Inventory	Account	1	Ŧ	
	Account		<u> </u>	
	COG5 Account		*	
	Asset Account	1	*	
Service				
	Service Account		*	Non Inv
				2 S
Other				
	Other Charges		-	Non Inv
Тах				
	Tax Agency	1	•	
nnection	Status			
/izard load	ding Setup Value. to Quick BooksPlea			3
onnected	to QuickBooks comp	any, loading values.		
onnected /izard load	to QuickBooks compo ding 88 account value	any, loading account values s.	49 	
uuuuuuu	ปกมีกกกกกกกกก ding 214 tax (vendor) อ			
rizard load	aing 214 tax (vendor) a	account values.		

Application Authentication Certificate Form

(Control	An application is requesting access to the following Quickbooks company like: Another QB Co. Access may include mading and modifying Quickbooks dats as well as wharming the Quickbooks as in interface. The Application Cole Deaf BidPhogic Quickbooks Sync Client
0	Certificate Information Description: Quadificate Synchronisation Client Developer: Device Technology, Inc. Developer identify has been verified by: UTN-LIESRIField-Object UTN-LIESRIField-Object Optic Solutions Marketplace Search for information about this application at the © Quadificate Solutions Marketplace
No No Ves, prompt each time Tes, whenever this Qualit Ores, always; allow access (~) Allow this application to a	Aution to read and modify this company Rin? Inota company Rin is spen even if QuickBooks is not nutriting crees personel date such as Social Security Numbers and matter. Tell me more

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 check the box to connect to QuickBooks even if it is not running to 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.
- 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.

Selec	t type of Synchronization
0	Add and/or Update
	Select this if you want to send ALL BidMagic products to QuickBooks. If the product alwads exists in Quickbooks, it will be updated. Otherwise, it will be added.
÷	Add only
	Select this if you want BidMagic to only send NEW products that do not exist in QuickBooks
V Pa	oduct data export
₽ Pr	xduct data export

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. Please choose a single type of data to send, for example: Products. 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.

Note:	It is recommended that you make a backup of your BidMagic data first before you proceed.
_	nt Import
	duct data Import

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.

Choose Estimate Format
Send to QuickBooks as
One Estimate for ALL Phases
One Estimate for EACH Phase (Prewire, Trim, Finish)
 Group Bid Items Update these item Prices in QuickBooks Include Description of Work Break Down Labor Phases
OK Cancel

Progressive Invoices

In QuickBooks you can set preferences to turn Estimates into Progressive Invoices. This is very handy because you can create the invoice for all items, selected items or for a percentage of the Estimate. It even allows invoices different percentages for each item!

Territry Burris GE 1	ed .	•	- Our	ern Extensio	ni.	•			
Estimate			1	olex 81/30/20 Cithang 4 W2		Totary Guna Totary Guna Til Mas B			
(759)44	1000001000			1.001		ABOUT 1	hanness.	10764	1.044
HTBronde	Haros Theater P.	aciage - Bronte		1	7.000.00	7,000.00	5.00	7,908.00	Tat
#00500	Surge Protector			1	77.00	77.00	0.00	77.00	Tax
THETOD	Speakarcraft-Cet	Derg Speakers		3	544.60	1,089.20	8.00	1,009.20	Táx,
oot a	- Enconcellary	Solution and the owner of	and the second	el .	440.00	403.00	0.00	480.50	Tax.
coscolate Speakartrat BK770	<u>ه</u>	eals Program Indo	e Based On Estimate			100 20	8.00	188.20	124
ntel	Specify what to include an ifte trivolo	2				6573.60	8.00	1.579.80	Tax.
CableHard	· Create invoice for the entire in	CARGER INCOME.				487.00	8.00	457.00	Tax
3+rightrant	Create motos fer a percenta	and the second se	vala		138	1,178.68	8.00	1,178,88	Tax
retal	A damage					1,578.08	8.00	1,178.68	i bioe
reatte	C Chiefe motor for selected if	area or the different of	arrest terms of such laws		100	245.50	0.00	248.50	Ripm
Drifts	C. C	and in the second second	and a second second			42.50	5.00	42.50	Non
lwsh	95	Cascol	Help			\$18.25	8.00	818.25	tion
					_				
								14,144,21	F
						diage		0.00	
			138	0.070000	· • 0	10%6		844.22	£

Problems with Sending to QuickBooks Invoice or Estimate.

If there is a problem with an item in a bid, you may receive an error sending a bid to QuickBooks. You can open Bid Settings and select Reset Bid Products to QB Link. This will reset the product sync to the QuickBooks item. Try this and then resend the bid. If you still have a problem, contact support.

nice Call Homation		Labor			John Caret to 1			
			Labor Diff	and the second se		Gent Addresses		
envice Name: The	tple Service Tobel	120.000	Cost.	54 DC	Company Nas	. Sande Service	Toket	
Sales Person:	Your Name	Provin	\$40.00 \$40.00	885.00		235 Stovenues Club C		
Sales Phone	1800 555-1212	Freish	\$40.00	885.00	1.	novem	State	ico :
PM Name:		14400	5-0.00	800 VL (Country		-	81615
iong					1000000	870 825 1111		01013
Labor Tax OFF Labor Tax ON					0.0000	IS/Canada · · ·		
VAT/HST					Enal A	toug@provinamench	209	
Tas on Cost Ba	ain (Uno Tau)				Contact Perso	en Doug Reymer		
Price Level		Design/Mget %	0.00	0.00		ido Sile Map	100	Cast side of (
					Description of W	Nork		
 Digitaj es fiec 	urmų 🛞 Daglių as Optoral					description of work he nd can be set to mobi		
					Comments			
				1	This includes a ser- service call that is	e call needs at least o right of warranty servic billable in the Kid's Bei Dashboard, Service T	e in the Fanity to in. Both and	Room and a basic Service calls can be

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.

ime Sheet					- 0	2
Select employee name	and pay period					
Usemane: admin	~	< Pay Perio	d 🔉 Total	Hours: 1.12		
Send to Qui	ckBooks	From: 06/19/20	16			
Export to Excel	Close	To: 06/25/20	16			
		Time Sheet for admir	from 6/19/2016 to 6	3/25/2016		
DATE	DAY	TIME IN	TIME OUT	WO NUMBER	HOURS	
06/19/2016	Sunday					
06/20/2016	Monday	11:30 AM	12 15 PM	Lunch break	0.	75
06/21/2016	Tuesday					
06/22/2016	Wednesday					
06/23/2016	Thursday					
06/24/2016	Friday	01:19 AM	01:41 AM	TO-0000-0750	0.	37
		01:41 AM	01:41 AM	WO-0000-0750	0	00
06/25/2016	Saturday					
					Total = 1.	12
<u>.</u>						

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.

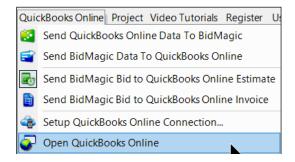
Basic steps to QuickBooks job costing.

- 1. Create Items including cost and sell price for products and labor you sell and associate with QB accounts.
- 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.

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.

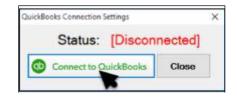
If you assign equipment order phases and labor phases to the products in BidMagic, you will have the option to create 3 separate invoices or estimates (one each for prewire, trim, and finish phases.) Some QuickBooks experts prefer this approach for automatic progressive billing and job costing calculations. 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.



BidMagic allows you to send the Sales Tax rate, but **QuickBooks online will automatically assign the sales tax amount based on your company's location.** You can override this if needed. See below.

We calculate sales tax for you bay f you ship, we account for that, to		e and wh	at you sell.
Tax description	Invoice total	Rote	Tax total
Celifornia (State)	\$16,297,14	6.25%	\$1,018.56
Ventura (County)	\$16,297,14	176	\$362.97
Los Angeles County (District)	\$16,297,14	2.25%	\$366,70
Total sales tax		5	51,548.23

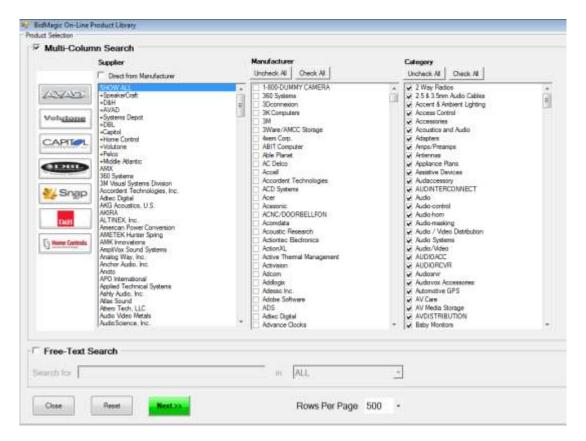


BIDMAGIC ONLINE PRODUCT SEARCH TOOLS (OPTIONAL SUBSCRIPTION)

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.



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.

/¥ 2.5€ € 1.00	int set Sel Proper (UK	SRP for New Pr er will set sell pr	odusta oriy (do init o ces. CAUTION: \$0*	vervete exeting Sel Proce II be the initial amount until	-	of all imported products priv	ir to including in proposals		
Ununeok All	Dek AL								
IMPORT	MODEL.	BNGE -	CATEGORY	WES NUMBER	NPG ISANE	2.095.03	DESCRIPTION	PEATURES	UNT
-12	CM1W18U	1	Minc	CM1W18U	Chiel Mig.	Chief Manufactur.	Automated Swing Arm Mount for Fiel panel TVe	Flat povel 7V ms.	**
.13	CM2C40	- U	Misc.	CM2C40	Chief Mig	Chief Manufactur.	Automated Fist Panel Ceiling Lift	The CM2C40 pro.	**
15	CM2L40	1	Minc	CM21,40	Chief Mfg	Volutione	CHIEF CM2L40 CINEMATIC UFT W/O PSB	CHEF CM2L40	
.8	CM2L40U	1	Minc	CM2L40U	Chiel Mfg	Volutione	CHIEF CM2L40U CINEMATIC LIFT W/ PS8U	CHEF CM2L40.	**
10	CMEDH	44.4	Mirc	CMEDH	Chiel Mig	Chief Manufactur	CM6 Automated Accessory for Large Plat Panels	The CMS-DH a.	**
13	CMEDV	1	Misc.	CMEDV	Chief Mig	Chiel Manufactur.	CME Automated Accessory for Large Flat Panels	The CM0-DV is n.	
13	СМБОН		Minc	смеан	Chief Mig	Chief Manufactur	CME Qued Horizontal Door Mechanism	The CMI-GH m.	**
.0	CMA290	4	Misc	CMA290	Chief Mfg	Chief Manufactur	CMA-290 Cable Locks	Cable locks provi.	
10	KSA1020	K	Mirc	KSA1020	Chief Mig	Chief Manufactur.	CPU Well/Desk Mount	The KSA1020 is.	
13	КТР225	T	Misc.	КТР225	Chief Mfg	Chiel Manufactur.	KTP225 Widescreet Dual Hoszortal Montor Table	Chief's KTV	
KWK110 is sufile abore		tion for mour	ting a keytoard	to cove valuable desi	a space at the hor	w or office. "Shipe with	left and right mouse trays fully assembled and mouse	pouch for storage *Key	

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.

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 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.

G ABIASPECS Grabbe		
o o a <mark>Gral</mark>	Comm with the post postant of	
		Integra spectral one Projecture Video Disc Playersificconders AV Receivers and Amplifiers Spectrum Accessories Sec- ments Please Enter Manufacturer and/or Product Model to Search
	Manufacturer (Swy Cago	water Product Wodel
	Reart Al Fakis	
	Search Filters	Search Results for: - 348 Found
	Search Trail (a) New Companying (a) LTU TWN	Verwing Resets 150 of 345 - 1 Presets (1 / 2) 2 (4) 5 (Real) Resets Per Page 24 (2)
	Neywood Filter	Kerry BRAVIS EXEMPTION: A STATE AND A
	Sensor Star	Comparison of the second

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.

C. MEGAGPECE developm			
000		a may be used for Physical Condition (product assocs on the internat	
	BIDMAGIC	MEGA SPECS	Enler Keyword
-	Consumer Electronica Televisions Pro Cameras Displays Devices Notwork	pectors - Maximilian Players Weconders - AV Reconsers and Amplifiers - 1	Speakers: Accessiones: Sacarty
	Consumer Destroace / Udea Dectroact	s / Televisiane / LCD TVs.	
	Destreter Technical Specifi	Hz ArBC - 1520 x 1088 - Ostov Digital Filan, Surround Seand ArBC - 520 x 1088 - Ostov Digital Filan, Surround Seand In (1995 - 520 x 1996) In (1995 - 520 x 1996	LED-LCD TV - 16:9 - HDTV 1080p - 480 - 4 + HDM - US9 - DLNK Catfled - PC Steaming - internet 725254094 - E.VE 0039725234998
	Hain Features - HTMI Variation - HCME 1.4 - Maximum Recolution - 1020 c m30 - Scalin Fermat 1093p - DLIAK centend 196 - USB - Yes - Wold with Stand - 38.80° - United Warrany - 1 Yea - Honget 20.3° - Explanated Redwarth Rate: 400 Hz - Eligital 4.446 Cutent 196		

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.

roduct Info Favorite Discontinued Model (required):	Asset Tracking Add New Add New
MAX500	
Description (required):	
Surge Protector	
Supplier:	MEGA SPECS
Capitol	Mrg Number:
Category:	MAX500DBS
Accessories	Mfg Name:
SubCategory:	Panamax
1	+ UPC:
Features:	878997473289
Protects your AV equipment from damaging lightning and	power line surges. Guaranteed

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

Favorite	Previous &	Add Mex	Image	Visio Roor Plan	Bevation
Model (required):	Next 8	MACCALLERS.			
CONTROL 19C51		-	poure -		
Mg Nanber:	Mig Name:		100		
3850125	JBL Professional				
Supplier	GE kon name	QB Type:	Height Width:	Depth: Weig	H
aptol 💌					2
escription (required):			AutoLink Package Builder	N	
Contractor Ceiling Subwoofers			AutoLink Package:	Sav	e Product before adding Links
edues:				Madel	
Equipment Labor Union Inventory Unit Cost: 32Margin 5319:00 28:18 MSR0: MAP/Web: 5515:00 50:00 Cable/Hard	You have the IP YES up IF 1.0v	option of upgrading th date pricing inform	SRP only when the exating value MAP and MSRP	n the online BidNegic Product I	itee, Cold.
Phase: Buy Oty: Unit: Trim • 1 pr • Shipping: Total Installed Price:		3	Canoe OK	1	

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)

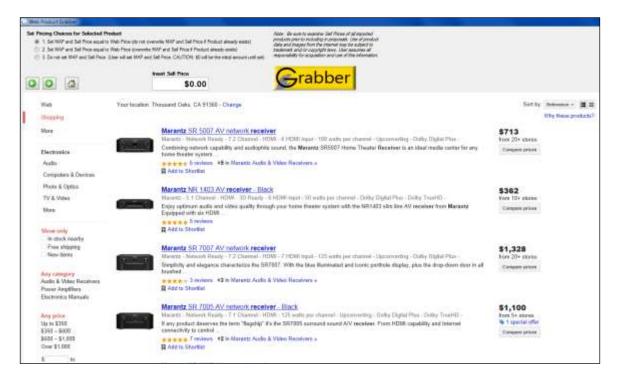
Shift/click or CTL click on the green square Product Selector to select multiple products in BidMagic's Product Table. Then right click to open the submenu. Select Get MEGASPECS to add to all selected products at once.

🔒 Cients 🕥	Roome () a	aki Settinga	10	o Folder 👼 Job Folder 📲 Tettesh	7-									
Coren D	www.Preda	ets VenDorg	-	Sectores Partney Online Project Manag	e Provi Calandre Prov	et Treatre								
ditter illeses.	Product Manager	Seatch		án (HDIODL +	Search Clean Strawin	ng Product	s: A8							
on. /	HIS MADE	NFG HHE	1.80	DECRATON	reatures.	symuch	801 971	Hony sur	1.8	ncoer	allowing the	waan s	turnez -	
		Davia	100	2741 MARCA 18 Linearcal Processon Distants	2555 Planut Blazy Debuy	1001	111	11.10	10.00	111.112		E ILPS-	25	
	n Box to Select			2009-to 22019 Highwarmani amerika Ph LT	\$300/to 320///-statement				ED OC				100	
Shft Click or	CTL Click to M	uiti select		Taken Ramon Connello (2010) 20100 (00							1.10		10.0	
			100	Allabora Phys Contenal Patterns Report	TRANSMIC SERVICE INSTITUT						1.0		÷.	14
N. R. HIGANS	ALC: NO DO NOT												10	
NID													\$1,585	
TAXA VEREES		PROFESSION.			Min DV 2005 Generates 1910								\$111001	
				ALCOMETER HIGH Definition (higher Chevron-	The presented new topoment A.	1.							101	
Contraction (AG-HENTTO High Detroiter Option Caronia		1		15,60110					EX COLUMN	
					THA AG OT 1995 IN HIT MILES	1							100	
Right Click o	n Green Box fo	r SubMenu			The AG-ITTODG is a reave D									
		0.010700	0.0	RG-UVADOG Warephone Adapter	The MG-WWA00G is a 3-Chis	Permit								
				AG-VLC IO Commission Hand Shell Weather	Part Distantine Constant									
C Y I K C				AC VALUE Generative Thermologie Heat C	Thereasters there in a me	1							100	
1000	ACC YOR THE	2. Clarker		adj MUNCTON Commenter and Comp Came	Bud Carrying Comp	Assessed in the local division of the local		W.W.	1000	10.00	0	000		
GerMELASPECS	and the second second	121100	-	Dritten Albama Phas Herburg Fred	through the former should be				NUM	10.10	0		- 21	
And in case of the local division of the loc	ANTINA			D Rev Address Play Ballery Park	In taxes in farme destrict.			10.00	1000		8		- 81	
and the second se	AME STRATE	P CI INA		AA Goo Longer Pargers Televis Park AA Goo Longer Pargers Televis	HE WARD DEFINENCES IN A STREET			111	1000		10	001	- 40	
	ANA ADALES	Perman.			through the provident for			62.000	1000			001-	÷1.	
44 40 40	ANA ATAVAE	Contraction of the		AAA Sani Deneral Perpensi Bathery Peric AAA Sani General Perpensi Bathery Peric	A peak Continent and the p-	1000		1110	1000	10100	10	001	÷.	
	CALL ATTACK	-		Address Deveral Persons Ballery Park	Address of the owner of the owner.	1001-		100	BOOK I	10.00		005	- 21	
AND INCOME.	ANTELLOW	ALC: NO.		All PENDS Value Conferences Contain	The NULLET 20 STREET				NUMBER OF STREET		1	100	111	
VOVMBDELTS*	AYDVM00E LIFE	Parameter.	1.44	Mini CV Cassafts	CONTRACTOR OF THE OWNER	DSH:		\$14.00	10.01	\$0.00		E.00%-	514.0	
WOMMIDE.R	ATTIVM00E.JS	Parmeric		Mini OV Cessette		DSH		\$29.15	\$10.00	\$0.00	100	0.00%	1201	
W-CVME2HD	AV-DVMC3-ED	Parameter.	1	av. Phillip of the dist Passage	All restates recording time	DEL	1	10.00	50.00	\$0.00	100	1.00%	581	
V-CMM65H02	A REAL PROPERTY AND A REAL PROPERTY.	Paraura	1.2		minutes recording time	DSL		819.00	\$0.00	50.00	10	8.00%	\$181	
W-CUMENPLE IS	AV-01480P0	Panescrie	ave C	Right Click on Grid to Open the Product	a AMQ tape selves proved.	Parasent	11	90.00	50.00	60.00	100	8.00%	.901	
W-CANKEE.MP	AV-DVM05E.HP		1.2		minimum recording time	064	1	\$10.00	\$0.00	\$0.00	10	8.00%	\$16.0	
VOVMOCE.	AV-DUMBER	Panasonic		MaxOV Canadto	Contraction of the state	Dáil	1	\$10.99	\$6.43	\$0.99	10.00	8 00%	\$101	
VENMILLE I	AV-DVM00EJ1	Panasonic		Mei OV Cassetto		DáH	1.1	\$10.99	\$7.49	\$0.00	- 85	8.00%	\$10.4	
LXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	AY-DVM00KJ	Patennic		MiniOV Canada		DAH	10	\$12.00	122.40	\$0.00	1000	0.00%	\$121	
WEWWEEKUT	AVEVM00XJ1	Panascric -		Mini DV Cassatte		DM	1.	\$10.00	58.82	\$0.00	6	0.00%	\$10.1	
WHENTERAMO	AVCHOVIDIA.	Parasenic		AV-HOVTREAMQ DVC Cessette	Advanced Manuel Guality (R.)	Parasers.	1	\$2.00	50.00	\$0.99	100	0.00%	\$01	
AV-HDV276AWQ	AY-HOVENA	Panaserie:		AY HD/075AMQ OVC Cases to	Advanced Meeter Guelity (A.	Pariasoni	1	\$0.00	\$0.02	\$12,000		0.00%	\$0.0	
AY HENDEAMO	ANT HEY PEAKED	Panastric		AV HOVERAND DVC Casesta	Athensed Meater Guelly (A.	Permanent.	11	50.00	30.00	50.00	35 400	0.00%	int.	11

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.

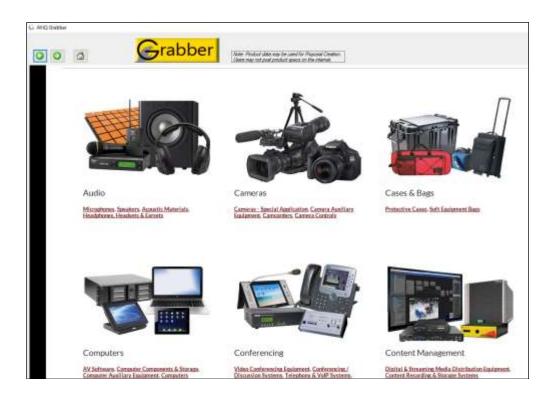


Results after Grabbing an Online Product into BidMagic.

Model description for a reason of the second se	tuct Manager			
UNR007500/1FX2A Mig Name: Samping Sepaphier OB Rem name Provide 1 and 1	Product Mo		Vieo	
LINGE SPOUTPICA Mig Name: Invester of the second	Model (required): Discontinued	Distances in the second	Image Roor I	Nan Elevation
Mighter Mighter Servering Servering Servering Conservering Servering Conservering Servering Conservering Servering Conservering Servering Conservering Servering	LN40B750U1FXZA	THEORY & CONTRACTOR		
UH40E790UTFS/CA MG Nome: Semand Segular: CB Rem name: CB Rem name:	Mig Number:	Next M		
Servarig OB Itom name Characteristics Coll Itom name Description (preadred): Coll Itom name Servaries Coll Itom name Description (preadred): Coll Itom name Servaries Coll Itom name Mathema 1/2001/00/10 delivers mathema 1000 pream with up to 1000 11 dename scottart stee, step details, step details Finder Mathema 1/2001/00/11 delivers mathema 1000 pream with up to 1000 11 dename scottart stee, step details Finder Mathema 1/2001/00/11 delivers mathema 1000 pream with up to 1000 11 dename scottart stee, step details Finder Coll Itom 1 Coll Itom 1 Finder Coll Coll Itom 1 Finder Finder Finder Coll Coll Itom 1 Finder Finder Finder State 1 Coll Itom 1 Finder Finder Finder State 1 Coll Coll Itom 1 Finder Finder Finder Finder State 1 Coll Itom 1 Finder Finder Linder	N408750U1FXZA		A Property in the second secon	to y picke y
Stapplier: OB Item nume Description (required): Image: Save Product before adding Link Semang - Link00750- 49 ⁺ LCD TV - 1000p (FullHC)) Image: Save Product before adding Link Peotumes: Image: Save Product before adding Link The Semang T-Link00750- 49 ⁺ LCD TV - 1000p (FullHC)) Image: Save Product before adding Link Peotumes: Image: Save Product before adding Link The Semang T-Link00750- 49 ⁺ LCD TV - 1000p (FullHC) Image: Save Product before adding Link Peotumes: Image: Save Product before adding Link The Semang T-Link00750- 49 ⁺ LCD TV - 1000p (FullHC) Image: Save Product before adding Link Peotumes: Image: Save Product before adding Link Product Before the United and relations Save adding the Save adding Link Image: Save Product before adding Link Save Product Before the United and relations Save adding the Content free adding the Content free adding to the Co	Wig Name:			A States and a state of the sta
Supplier OB item nume Description (resp.ated): Semange -L1400750 - 40° LCD TV - 1000p (FullHO) Senar 7.02 + 60° V. doi: 10 - 1000p (FullHO) Senar 7.02 + 7000p (FullHO) Senar 7.02 + 7000p (FullHO) Senar 7.02 + 7000p (Sensurg		A tolich Parkage B dday	
Description (inclusive) Description (inclusive) Semange - Likb00/15/0 - 40° LC0 TV - 10000 (FullH0) Produmes The Semange - Likb00/15/0 - 40° LC0 TV - 10000 (FullH0) Produmes The Semange - Likb00/15/0 - 40° LC0 TV - 10000 (FullH0) Produmes The Semange - Likb00/15/0 - 40° LC0 TV - 10000 (FullH0) Produmes The Semange - Likb00/15/0 - 40° LC0 TV - 10000 (FullH0) Produce - 1 Likb00/11/2000 Semange - Likb00/11/2000 Semange - Likb00/11/2000 MSRP Semange - Likb00/11/2000 MSRP Semange - Likb00/11/2000 Semange - Likb00/11/2000 MSRP Semange - Likb00/11/2000 MSRP Semange - Likb00/11/2000 Semange - Likb00/11/2000 <td>Supplier:</td> <td>QB Item rume</td> <td></td> <td>Davis Directory hadow addies Links</td>	Supplier:	QB Item rume		Davis Directory hadow addies Links
Description (required): Somming - LN400/750 - 40° C CD TV - 100(b) (FulHO) Features: The Sense TV CD FOTY bit was asserted 1000 parenet with an 150,000 1 dyname contrast minimum of the asserted free three senses are contrast asserted 1000 FullHO in the sense interaction parenet parenet black based Figure embodies the sense interaction parenet parenet parenet black based Figure embodies the sense interaction parenet parenet parenet black based Figure embodies the sense interaction parenet parenet parenet parenet black based Figure embodies the sense interaction parenet parenet parenet black based Figure embodies the sense interaction parenet parenet parenet black based Figure embodies the sense interaction parenet par				
Samang - LM400 PSO - 40° LCD TV - 1000p (FulHO) Textures: No Sama 71 LCD HOTY by darve a submeter 1000p genume version to 100 a 950 000 for American version rates, credit even the demands of the area in a sphill drive with pre-icade domain. Along with drease a 100 a 90 version the demands for demands of the area in a sphill of the demands of the assess in a sphill of the demands of the area in a sphill of the demands of the area in a sphill of the demands of the area in a sphill of the demands of the assess in a sphill of the demands of the area in a sphill of the demands of the area in a sphill of the demands of the assess in a sphill of the demands of the area in a sphill of the demands of the assess in a sphill of the demands of the assess in a sphill of the demands of the assess in a sphill of the demands of the assess in a sphill of the demands of the assess in a sphill of the demands of the assess in a sphill of the demands of the assess in a sphill of the demands of the assess in a sphill of the demands of the assess in a sphill of the demands of the assess in a sphill of the demands of the assess in a sphill of the demands of the assess in a sphill of the demands of the assess in a sphill of the demands of the assess in a sphill of the demands of the assess in the demands of the demands of the assess in a sphill of the demands of the assess in the demands of the dema	Description (maximum)			E sndee
Feedures: The Sense T JLCD HOTV's deliver a sease with 1000 percent with up to a 100.000 1 dyname contrast ratio, may a deliver a sease with the second to digital media devices with the sphere and to device a view of the scandard percent with the soft and sevices with the sphere and to device a view of the scandard percent with the sphere and the without the scandard or devices with the sphere and the scandard percent w			Owner I and the state	Denne M Albert & Albert M
The Sense 7, LCB HOTV's deriver a subsector '0000g persone with up the 150, 000 1 dynamics constraints in the subsectory of the subsectory			creaters, 11.00 -	THE REAL PROPERTY AND ADDRESS OF THE PROPERTY ADDRESS
Category: Category: 40° LCD TV Whith: Height: 20 7/n [27 2 m] 10 m [41.2 bs	Alexes 7 here entrodes the utmans term of "Junctions and international processing international	Barenargs new TeC Truck of Cates design. The Intercent pane black basel Sell Price: 51.199.00 Shipping: 00 55.00 Units: 0 1 0 1 0 10 10 10 10 10 10 10 10 10 10		
Category: Product UM: Open Link 40° LCD TV T Products // Statiog7 Width: Height: Depth Weight: Last Updated: 38.7/n [27.2/n]10/n [41.2 bs	A CONTRACT AND A CONTRACT	RD:		
With: Height: Depth 87 /m. 27 2 in 10 in 41 / L2 bs 41 2 bs	ALLONDO DE LA COMPANY			
Width: Height: Depth: Weight: Last Updated: 38.7/n 27.2/n 10/n 41.2 bs				
38.7in 27.2in 10in 41.2 bs	40° LCD TV 🔄 [http:	//www.google.com/products/catalog7		
		ight: Last Updated:		
Change and Change Street Change Chang	38.7 in 27.2 in 10 in 41.2	lbs		
		Burne Barner and Phone		

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.



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.

Important Pricing Notes: The Online Product Library generally shows MSRP prices per each or per pair. Bulk Cable shows MSRP

Import Control 4 Products (Dealers only)

Authorized Control 4 Dealers can contact BidMagic to get access to Control4 Dealer Prices and Product information. This is a great help to keeping your important products up to date.

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.

Product Manager	t	
Product Info	Favorite	Previous 🛠 Add New
Model (required)): Discontinued	
NILVCS100DSIAL		Next 🛛
Mfg Number:		Mfg Name:
NILVCS100DSIAL		Niles Audio
Supplier:		QB Item name
AVAD	•	.]
Description (req	uired):	
VC Decora Insert A	lmond (6pk)	
Features:		
Equipment	bor User Inventory	Tax Equip
Equipment	Unit Cost: %Margin	Sell Price:
	Unit Cost: %Margin \$1.86 41.00	Sell Price: \$3.16
Equipment La MSRP:	Unit Cost: %Margin \$1.86 41.00 MAP/Web:	Sell Price: \$3.16 Cost Sell
MSRP: \$3.16	Unit Cost: %Margin \$1.86 41.00 MAP/Web: 5 \$0.00 Cable/Hard	Sell Price: \$3.16 Cost Sell I: \$0.00 \$0.00
MSRP: \$3.16 Phase:	Unit Cost: % Margin \$1.86 41.00 MAP/Web: \$0.00 Cable/Hard Buy Qty: Unit:	Sell Price: \$3.16 Cost Sell \$0.00 \$0.00 Rack Units:
MSRP: \$3.16 Phase:	Unit Cost: %Margin \$1.86 41.00 MAP/Web: \$ \$0.00 Cable/Hard Buy Qty: Unit: 6 ea ¥	Sell Price: \$3.16 Cost Sell 1: \$0.00 \$0.00 Rack Units: 0÷
MSRP: \$3.16 Phase:	Unit Cost: %Margin \$1.86 41.00 MAP/Web: \$ \$0.00 Cable/Hard Buy Qty: Unit: 6 ea V Total Installed Price:	Sell Price: \$3.16 Cost Sell \$0.00 \$0.00 Rack Units:
MSRP: \$3.16 Phase: Shipping:	Unit Cost: XMargin \$1.86 41.00 MAP/Web: \$0.00 Cable/Hard Buy Qty: Unit: 6 ea Total Installed Price: \$ \$3.16 \$	Sell Price: \$3.16 Cost Sell I: \$0.00 \$0.00 Rack Units: 0÷ Hide Price Level
MSRP: \$3.16 Phase: \$5 Shipping: \$0.00	Unit Cost: XMargin \$1.86 41.00 MAP/Web: \$0.00 Cable/Hard Buy Qty: Unit: 6 ea Total Installed Price: \$ \$3.16 \$	Sell Price: \$3.16 Cost Sell \$0.00 \$0.00 Rack Units: 0÷ Hide Price Level Option Recalc OK

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. You can also access these training videos from BidMagic's Tech Support page, where they can be viewed from any browser.

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://knowledgebase.bidmagic.com/kb/root.aspx

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.

Reset Monitor

If you add additional monitors then remove them, BidMagic may attempt to open the Add Product Window on a monitor that is no longer present. If you attempt to add a product to a bid and no window appears for you to choose a product, you should use this feature to reset to your current monitor setup.

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.

BidMeyer Fin Mabil	or Large with 102										
File View Bids F	hint Settings Tempi	lates Impor	t/Export QuickBooks	Online Products Project	Video Tutoriais	Register User	Guide Help				
Te Manufaud	· ·		A num II n	and and the fallen	NAS INCOME	-	ter Tefers	1.1.1			
New Lead	The Count Cos B	id Settings	The mooms and here	eview 🔯 Job Folder	2010+010E	er 🧱 ect Hold	ser 📑 Refrest	S			
Bid Contacts D	antiquere Products	Purchase (Dides Project Manag	ee Project Calendar P	roject Timeline						
	es/Track inventory and	and the second									
Presite To		Cent I				100					
COLUMN TO AND ADDRESS OF	transf for the second of the	CAN	and the second second second second	le-Labor addeil as neo		umnay Vew					
Were Room: Al Rooms			• U 🛛 🕬	Export to: Excel	• Go	Detail View					
MODEL	MOON	Q7Y (UNIT HEGINAME	DESCRIPTION	ORDER F ARE	SUPPLIER	PO #	9902101	10-19H11ED	102240	#2%42
Power Search	1										
R HTB	Contrience Room	1.00	Inter Provide	DLP Video Projector	1	Runco		A F			
AVR507	Conference Room	5.00	ed BAK	7.1 Surround Proces	wish.	E&K		1	-		1
MAX500	Conference Room	1.00	ea Panamax	Surge Protector	Finish	Capitol		- 101		13	11
TR760	Conference Room	2.00	pt Speakercraft	Calling Speak	Trim	Capitol		11	21	13	21
AXS	Conference Room	DETAIL VI	EW INCLUDES OTY	IN EACH ROOMAREA	pish	Capitol			10	10	
Intel	Conference Room			in cristing subscripting	untr (Capitol		10	21		21
install Hr	Conference Room	8.00	60	Hours - Installation Labo	1	Inhouse		10	10	10	21
HTS	Conference Room	2.00	ea Digital Projection	DLP Video Projector	# inish	Runco			13	.0	1
AVR507	Conference Room	2.00	ea BBK	7.1 Surround Processor	Pinish.	D&K.		0		13	
MAX500	Conference Room	2.00	ee Penemex.	Surge Protector	Finish	Capitol			13		1

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.

BidMagic Pro Multilu	er Editori	····81.03	57								
File View Bids P	rint Set	tings 1	Templates Impo	rt/Export QuickB	ooks Online Products P	roject Video Tut	orials Register U	ser Guide H	elp		
The second	•	1.1	N minut	- I		PARK,	e iller hav		22.00	1	
New Lead	Cli	ent g	Bid Settings	Rooms	Preview 🕎 Job F	older 2 Job	Folder 20 POF	older	Refresh		
Bid Contacts D	eshboard	Pioc	Jucts Purchase	Orders Project	Monager Project Calenda	Project Timel	ne				
		course	Constant and the second								
Create Purchase Orde							· · · · · · · · · · · · · · · · · · ·				
Pressre Tor	ή.	Finish	Clear	Job #301-:	Sample-Labor added a	s needed	Summary Wew				
New Room: All Rooms	_				Export to Excel	• 60	Detail Vew				
MODEL	QTY:	UNIT	MFG #	MFG NAME	DESCRIPTION	ORDER F	SUPPLIER	ORDER NOV	PG-PAN/182	NICENSE	nitte
Power Search	1							4			-
AVE507	4.00	63	AVR507	BBK	7.1 Surnand Processo	7	BaK				
AXS	4.00	60	AXS	Middle Atlantic	Environment Dark Cur		Capitol	13	. (2)	10	1
HTS	4.00	65	RE SUMMAR	Y VIEW COMBI	NES TOTALS FOR ALI	L ROOMS.	Runco	<u> </u>			
Install Hr	8.00	65	Ine	THIS IS HELP	FUL FOR ORDERING.		Inhouse	1	1		
Install Labor	5.00	00	Int				Inhouse	13	6		
Intel	4.00	00	NC1400	Niles	Intellicantrol System	Finish	Capitol		1	21	
MAX500	4.00	60	MAX500DBS	Panamax	Surge Protector	Finish	Capitol	Ċ.			
TR700	8.00	-	TR700	Speakercraft	Ceiling Speakers	Trim	Capitol		100		1

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.

Create Purchase Order Prewire Trim				Job #30)0-: 5	Sample - Products calculate	labor		
View Room: All Rooms				-		Create Purchase Order	Go	Show Summary	
MODEL	PO #	ROOM	QTY	U	INIT	-Export to Excel -Create Purchase Order -Import Asset Tracking Data	UPPLIER		DESC
Power Search						-Reset Purchase Status			

should approximately a	Address of the local division of the		And and a subscription of the local division	Job Folder			-					
Bid: Contacte	Ossitoert	Products View Desig	gner Parchae	ng: Purchase Orders	Project Manager	Project Calendar	Project Timeline					
		ntary and Installation	Jub #	306-: AV Security S	Bystem	Summer Vers	7					
View Room: All Flam	ne);			Gasta Furthere I	ndar 🔹 🚺	Detail View	1					
MCCEL	PO#	ROOM	ατγ	MFG # Export to Eace Import Asset Track Paset Purchase 3	ing Data	EFUER	DESCRIPTION	PHASE	0000-004	slubbriti	(Jurnel)	1014,48,0-8
HTS		Home Theatre	1.00	RS-1100	es Aunco	Runto	DLP Video Projector			0.1720	0.00	0.0
AVR507		Home Theetre	1.00	AVR507	ne BBK	B&K	7.1 Surround Processoor	1		0	0.00	0.0
MAX500		Home Theatre	-1.00	MAX5000BS	ee Panomax	Capitol	Surge Protector		10	10	0.00	0.0
TR700		Hume Theetre	2.00	TR700	pr Speakercraft	Capitol	Ceiling Speakers			83	4.00	0.0
AXS		Home Theetre	1.00	AXS	es Middle Atlentio	Capitol	Equipment Rack System			0	0.00	0.0
Intol		Home Theelre	1.00	NCH400	siz Nilos	Cepitol	Intellicontrol System		10	123	0.00	0.0
H78		Badrinoro 1	1.00	RS-1100	ee Aunco	Runco	DLP Video P	1		1	0.00	0.0
AV9507		Betropm 1	1.00	AVR507	-				1	10	0.00	0.0
MAX500		Bedroom 1	1.00	MAX5000BIS			selected to Order Now,	6. L	10		0.00	0.0
TF1700		Bedroom 1	2.08	TFI700			in red to remind you to			12	4.00	0.0
AXS		Eedroom 1	1.00	AXS	Click Go o	on the Action Me	enu to complete this acti	on.	. 0	- (3	0.00	0.0
Intel		Bedroom 1	1.00	NCI400	10				0	0	0.00	0,0
TH-42P		Family Room	2.00	TH-42PX75U	se Patesonic	(AVAD)	42" Pestie HOTV		121	10	0.00	0.0
MTRUE		Family Room	2.00	2280308	ing Chief Mig.	Capitol	Large Low Profile Flat Pa			12	0.00	0.0
TWO		Family Room	2.00	TVO	es Inhouse	Capitol	TV outlet white		12	0	0.00	0.0
MAX500		Family Room	2 00	MAX5000BS	es Peramex	Capitol	Surge Protector		PT-	100	0.00	0.0

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.

File View Bids	Print Settings Ter	mplates Import/E	cont Quick	Sooks Online P	toducts	Project Video Tur	torials llegiste	r User Guide Help						
	Service and the service of					Sector constraints								
Cient d	🔒 New Client 🐧	Rooms 0 8	id Settings	Job Folde	e 📳 P	lefresh								
Bel Contacte	Deshboard Product	An Vent Designe	Estime	g Piestaee D	des Pr	oject Manager	Project Calendar	Project Transfere						
Create Purchase O	nders/Triack Inventory a	nd installation												
Rove	Tain Faisk	Clear	Jub #3	06 AV Secon	ity Syste		C POLICIA DE LA COLONIA DE LA							
View Room: All Box		A mosts	- 01	-Beatin Be	ad in the second	• 6	Suremany Versi - Denail Wess							
1.000							the state of the s							
HODEL		01 0	U.	MFG#	047	MFG ISAME	SUFFLIER	DESCRIPTION	PHIE	04052+0+	9600475	Diset	10%38284E	34(4)92
Power Search					1000						S	d 6		
HITS.	18	ann Theater	1,00	95-1100		Renot:	Harten .	DLP Video Projector				0.00	0.00	(
AVR507	10	me Theatre	1.00	AVR507		BåK	BAK	7.1 Surround Proceeeur		D.	D	0.00	0.00	0
MAX500	H	ame Theatre	1.00	MAXSOCIES		Peternex	Capitol	Burge Protector		100	-13	0.00	0.00	0
TR700	H	me Theatre	2.00	7FF700	ta ta	Speekercaft	Capitor	Calling Speakers		ALC: N	13	4.00	0.00	0
AXS	H	me Theore	1.00	AXS	- 98	Middle Adantic	Capitol	Equipment Rack System.	-	10	0	0.00	0.00	1
Ning!	H	arteer() arte	1.00	NCHOO		Nies	Capitol	Intellicontrol System		12	6	0.00	00.00	D
MIS	A	adroom 1	1.00	RS-7100	eið	Ronce	Hunco	DLP Video Projector			0	0.00	0.00	0
Avesor	Be	iaroom 1	1.00	AVR507	1. 10	SBK	BAK	7.1 Surround Processor		1.0		0.00	0.00	.0
MAX500	Be	etroom 1	1,00	MAXSOCOBS	10	Pa			1.	0	D	0.00	0.00	1
TRF00	Be	Hiroom 1	2.00	19700	p					1	0	4,00	0.00	1
AXS	471	stroom 1	1.00	AXIS		Plate C		highlighted in pink. ens Purchase Notes.		10.00	0	0.00	0.00	
Intel	Be	etroom 1		NCH00		Ter.	nex + c it op	ena Purchase reples.		10	0	0.00		1
TH-42P	Fa	imily Room		TH-42PX75U		Pa			5	10	10	0.00		
MTRUE		unity Room		2280906	- 98	Charling .	Caban	Lugetow Printe Part Par	-	12	0	0.00		
TVO	Fe	unity Room	2.00	TVO	40	Whouse	Capitol	TV outiet white		10.	0.0	0.00	0.00	1
MAXSOO	Fa	unity Room	2.00	MAXSOUCIES		Panamax	Capital	Burge Protector		1.23	0	0.00	0.00	0

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.

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.

BidMagic Enterpr	toe MultiAver Editory	(4800.0)											
File View Bid	Print Settinos	Templates Impo	rt/Export	OuickBooks: O	nline Prod	ucts Project Vi	deo Tutorials	Register User Guide Help					
	-		1			-							
dient	New Client	Rooms (Bid Se	ttings 🕎 Job	Folder	Refresh							
Bid Contacts	Deshtoerd Pr	oducts Visio Des	and P	actesing Purc	hese Orders	Project Mana	oer Proof	alender Project Timpling					
and Conners	Transmontal 152	Annual Interestion	Autor Inc.	accessing [[Fore	intere condens	and the second second	igen respects	APPENDED PROPERTY AND ADDRESS					
Create Purchase	Indem/Track Invent	ory and installation											
Frentre	Trim Finial	Clear	1	lob #306-: AV	Security	System	C WHEN	aviles 0 Erei PC	6 w 20				
Wew Room: At Ro	0.000				ate Punthese	Order .	The local division of	al Very	CONTRA				
Party Party					1.55	Live and the	of some Persons	and the second se					
MODEL	PD#	RDOM	GTY	MFG#	UNIT	MFG.NAME	SUPPLIER	DESCRIPTION	DROWN NOT	ALCOVER	DIHED	TUTAL RECEIVED	BACK DRDBR
Power Search	¥												
HIS HIS	706-306	Home Theatre	1.00	RS-1100		Runan	Firmer:	DLF Video Projector	127	111	0.00	0.00	0.00
AVR507	700-308-	tiome Theetre	1.00	AVR507	68	68K	B&K	7.1 Surround Processor	Z.	12	0.00	0.00	0.0
MAX500	710-306-	me Theatre	1.00	MAX500DBS	. 69	Panamax	Capitol	Surge Protector	12		0.00	0.00	0.0
TR700	710-306-	Hon, Theatre	2.00	TR700	pr	Speakercraft	Capitol	Ceiling Speakers	E.	11	4.00	0.00	0.0
AXS	710-306	Home	1.00	AXS	65	Middle Atlantic	Capitol	Equipment Rack System	12	12	0.00	0.00	6.0
Intel	710-306-	Home Then	1.00	NCI400	+0	News	Capitol	Intellicontrol System	12		0.00	0.00	0.0
HTS	708-308-	Bedropm 7	1.00	RS-1100	00	Runco	Runco	DLP Video Projector	E.	10	0.00	0.00	0.0
AVR507	709-306-	Ber					1	7.1 Surround Processor	10	0	0.00		
MAX500	710-306-		When Pr	oducts are on	Purchase	e Orders,	incl.	Surge Protector	徳		0.00	1	
TR700						etail View only		Celling Speakers		1	4.00		
AXS			ght Click	on a PO Num	ber to Op	en the PO.	ital .	Equipment Rack System	8	8	0.00		
Intel		Bec					log	Intellicontrol System	D	0	0.00		5.01
TH-42P		Family Room		TH-42PX75U		Parasonic	AVAD	42" Plasma HDTV	12	123	0.00	10000	
MTRUE		Family Room		2280306		Chief M/g	Capitol	Lorge Low Proble Flat Pa.	0		0.00	C=70,000	70
TVO	-	Family Room	1.	TVO		Inhouse	Capitol	TV outlet white		10	0.00	5 0.000 M	0.51
MAX500		Family Room	2.00	MAXSOODES		Panamax	Capitol	Surge Protector			0.00	0.00	0.00

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:

File View Bids I	Print Settings Templates Imp	and see the second	and Boundary	Online Preview	Products Projec	-	Contraction of the		ter User Guide PO Folder
Bid Contacts I	Deshboard Products Visio	Purchasing	Purchase C	Inders 3	Project Manager	Cale	ndar Tim	eine	
Create Purchase Ord	ers/Track Inventory and Installation								
Prewire Tri	m Finish Clear		Job #333-	Aweso	me Theater Bid	-	- 3	Summary V	lew
New Room: Al Room	6			-Export to	Excel		Go	Detail Ve	W S
MODEL	ROOM	515721	QTY		Excel rchase Order et Tracking Data		PLIER	DESCRIP	TION
Power Search					age Labels				
HTS	Family Room Home Theatre	VID	1.00	- 60	Runco	-	-	DLP Vid	eo Projector
AVR507	Family Room Home Theatre	AUD	1.00	68	B&K	E	Drint Dag	kana	and Processor
TR700	Family Room Home Theatre	AUD	4.00	pr	Speakercraft	F	Print Pac		eakers
AXS	Family Room Home Theatre	AUD	1.00	ea	Middle Atlantic	R.	Labels		It Rack System
Intel	Family Room Home Theatre	CTL	1.00	ea	Niles	0	selected	view	tol System
TH-42P	Guest Bedroom 1	VID	1.00	69	Panasonic	AV/	D	42" Plas	ma HDTV
MTRUB	Guest Bedroom 1	VID	1.00	68	Chief Mfg.	Cap	ritol	Large Li	ow Profile Flat P
TVO	Guest Bedroom 1	VID	1.00	.00	Inhouse	Cap	itol	TV outle	t white
MAX500	Guest Bedroom 1	AUD	1.00	60	Panamax	Cap	latio	Surge P	ratector

Print Package Labels

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

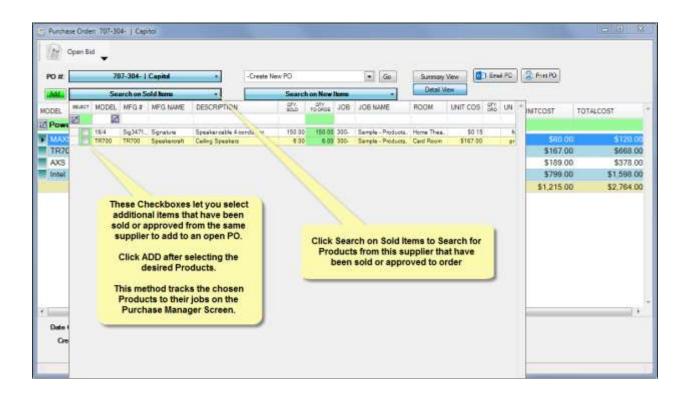
PURCHASE ORDER SCREEN

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.



PO #	707-304- Cap	ilul 🔹	-Create New PO	· Go	Summary Vers	2 Foot P	0	
	Search on Sold I	krm •	Search on N	ew flams	Detail View			
300	NEG	MFG TWME	MODEL	MEGNAN	DESCRIPTION	10	NITCOST	TOTALCOST
	1. COLORIN	The other	Paver Search				three are	1910494000
Power Sean	ch		1 164	· 60	Speakercable 4 conductor			
MAX500	MAXSOCCES	Panamas	400/110	ALC: N	IICA 1 Mater cable	2.00		\$120.0
TR700	TR700	Speakercraft	000-1340	GE Security	Concord 4 Security Parial	4.00	\$167.00	\$868.0
AXS	AXS	Middle Atlantic	60-745-01	GE Security	Superbule 2006 LCD Alphanumeri.	2.00	\$189.00	\$378.0
intel	NCI400	Nilos	AXS	Middle Arbantic	Equipment Rock System	2.00	\$799.00	\$1.598.0
Te	tals		5KT700	Spealwoah	Speaker Bracker	10.00	\$1,215.00	\$2,764.0
			CATT	Belden	Category Se renvent wable	10.00		
			CT 151	JUL Prefazzional	Company Calling Subwookers			
				Niet	Intelligented System			
			-	Panaman	Surge Piotector			
Searc	h on New Items	lets you pick from	ALL items from that	Chief Mig	Large Lov Profile Flat Panel Mos			
	supplie	er to add to an oper	PO.	Speakettett	Calling Speakers			
		a la se la comme de la comm		Inhose	TV outlet white			
	his lets you ord	em without associa er general stock for Due Date:				_		
Created by:	admiet	Notes						

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.

	21			-	-	ect Video Tutorials Register esh 🌆 Create PO 🚝		rint PO 💢 Delete P
Bid Contects	Dashboard	Products Visio De	isigner P	urchasing	Purchase Orders Proje	t Manager Project Calendar	Project T mine	
0.0	LOCATION	CREATED	ISBIOPO	SUPPLIER	NOTES	DUE DATE	RACKING #	STATUS
Power Searc	h							
205-304-	Main	03/06/2010	1	Funce			1	Operi
706-304			2				-	
708-306			40			and a second	120101-0000-0	Open
709-306-	Main	04/03/2013	1	Bak		To Print Multiple Purchas		Opeti
206-	Main	04/01/2013	12	Capitol	Purchase Order	Click or CTL Click on the		Open
000-	Main	03/01/2013	1	Crestron	Order extra for	to select multiple	lines.	Printed
702-800-	Main	03/01/2013	10	Capitol		Then Click the Print	POlicon	Printed
703-300-	Main	03/01/2013	12	Runco		Selected Open PO's	C. C	Printed
704-300-	Main	03/01/2013	N.	B&K		Printed PO's will be b		Printed
707-304	Main	03/06/2013	1	Capitol	Call Tom when		entrannet in the	Printed

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.

P0 #	720-300- (AD1	100	-Create New PD	• Go	Summary View	Erei PC 2 First	0			
	Search on Sold home		Search on	Kew Items •	Detail Vine		5			
SCRIPTION		MODEL	1064	BID NAME	NEGNAME	MFG #	QTY.)) (d	NITCOST	T074LCOST
Power Search										
Surge Protect	DI	MAXISOD	300-300	Benedict Canyon Hor	me Panamax	MAX500DBS		1.00	\$60.00	\$60.0
Equipment Fit		Aka		Go to Job		94	8.	1.00	\$400.00	\$400.0
Intellicontrol S		Inde	300-xxx	Go to Project Manager		NCH00		1.00	\$799.00	\$799.0
CAM-DM420-	245A Surveillence C.	CAM-DM420-2454	A Design of the second s	Delete selected item00	from Putchase Order	CAM-DM420-245A		3.00	\$229.00	\$687.0
			Totals		Service and the service of the servi	_		6.00	\$1,488.00	\$1,946.0
				•						
Date Createst	04/122013		05/29/2013							
Date Coatest Owand by			05/29/2013 Call Ted Lefone ordering							

RECEIVING PRODUCTS ON AN ISSUED 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 issued (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.

 Furthese Order Greate PO 	701-300 Crestron								
P0.#	701-300- (Cred	tre .	Production Received		Skow Suresay				
	Search an Sold h	100 (A)	Search on How	Herrs					
MODEL	108.4	DESCRIPTION	BID NAME	MFG #	MFG NAME	QTY.	ARCENED.	UNDET	TALCOST
2 0 011000									
CT 1000	300-	Color Wall Touch	panel Sample Prod	uc. CT1000	Crusticis	15.00	1.00	0.00	\$7,500.00
	otels					15.00	4 · · · · · · · · · · · · · · · · · · ·	\$500.00	\$7,500.00
1		A		100 100					
Date Created	03/05/2013	Due Date:	03/29/2013						
Created by:	and a state of the	Notes:	Order extra for stock.						
Status	Friend	Tracking Number							
-		admin					_		

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'.

The View Bals	🗩 kana 🔘	Balletingi 🔯 At	Hooks Deline Problem Project Video Folder 💭 iso Folder 🥼 Folder Res Report Manager Project Calendar Pr		e Culte Help							
10 #	25-383 i Cap	· ·	and the second second second second	De Dende	-							
NDDEL	1064	SCHARE	datest in Deel	RPS NAME	YTR			totauost	-	Nine-ovur:	1014.4608.80	40000
4			and PD to Cardon de									
10001166	303	Plantane Ottor	Santa Philip (permittioning a Phila)	Manual	10		\$12.00	11++100		8.00	E 000	Ű.
MAX590	303-	Purchase Order.	-Report PO Report PO	Panamax	3	00	\$90.00	8100.00	- 0	0.00	0.00	
MAXBOD	303-	Purchase Order.	Called Autom PU	Panamax	3	00	\$90.00	\$100.00	- 8	0.00	0.00	3
TR/00	303-	Purchase Order		Surekarcreft	. 6	00	\$167.00	\$1,002.00	100	0.00	0.00	
AXS	200-	Purchase Order	Table Internet Politics incre	Middle Allertic	3	00	\$189.00	\$567.00	- 23	0.00	0.05	
Tu	rfaðt		-Passion here: Y0 has been in out Y0 -Passion here:		37	00	\$488.00	\$2 073 00				

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

Organize • Include in library •	Sh	are with + Burn New folder			信 • 🛄	4
		Name	Date modified	Туре	500	
n Desktop	13	PO3-300- 06042013051334.doc	6/4/2013 5:13 PM	Microsoft Word 97 - 2003 Document	25 XB	
Libraries		PO7-30408092013093302.doc	MA 659 E1007813	Microsoft Word 97 - 2003 Document	32.68	
Documents		PO9-30406172013033438.doc	6/17/2013 3:54 PM	Microsoft Word 97 - 3503 Document	25 8/8	
Music		PO10-30006052013100113.doc	6/5/2013 10:0L AM	Microsoft Word 97 - 2083 Document	29 80	
Pictures Videos		PO11-30006172013033542.doc	6/17/2013 3:35 PM	Microsoft Word 97 - 2003 Document	25 KB	

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.

Hauit Settings Ro	ona Sedena	Pental Internal	tional Updates Job Phases Pay Period Automater	120		
Tas Tas Rate Labor Tas Labor Tas VAT/HST	0FF ON	9	Decimal Places for Quartity 2 v Default AutoLink Package to ON Activate AutoLink 2 Levels Use SubCategory	Shaved Path Mara Multiusens: Seth users can acce Set Individual Set Global Path Auto Save 1 Templates	ip a shared d so this same p Patha in User M th for Al Users to Job Folder	
Surtax	nt Basis (Use	Tan)	Organize by Systems	Job Folder:	C/Usern'-Pu	hte/Documents/BidMage
Labor			C Activate Price Level 1.00000	PO Folder:	C/U hers/PU	ERC Documents Billings
	Cost	Sel	O Unit Cost I Sell Price		1	Repet All Upers' Paths
Prewore	\$40.00	\$85.00	Une Inventory Feature Enforce MAP			CONTRACTOR CONTRACTOR
Trim	\$40.00	\$85.00				
Finish	\$40.00	885.00	Sound ON C			
	Cost	Sel	Tast			
Denign/Mgmt	0.00	0.00	User Passworth (Initial and Reset) Default Passworth BidMage			
Cost Price Adjustry	erd		Shelfennesile formeries			
) Margin ® Markup	(Manager 3 Marris contro Aprimultius	sto the		Word Format:	(i) dec	🔘 deex
				12257	as Recuring	Display as Octional

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.

Automailer Manager			-		×
Automail	er Se	ttings			
Settings here will be used	l for sending e	mail notification when	a job status h	as change	ed.
Host or IP Address:	smtp.office36	5.com			
Port:	587	🗹 Enable SSL			
Username:	you@yourcon	npany.com		er Yo	
Password:	•••••		cred		
			send		
			notif	icatio	ons.

Use Inventory (Enterprise Feature or Optional in Pro)

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.

) Bid Item Manag	er [Add to Bid]			_ _ X
		Qu	antity 1.00	ADD C
				-0-
Model: BKT	700			
	Favorite	📄 Asset Trac	king Last Upda	ite: <u>3/7/2013</u>
	-			
Mfg Number:	Bkt700		Select Imag	e picture
Mfg Name:	Speakercraft		Clear Imag	e
Category:	Accessories	· 🔰		
Description:	Speaker Bracket			
Features:	Required for inwall spea	ker installation.		
			- 14	
Install Note:				
Equipment La	bor Asset			
Phase:	_			Inventory:
Prewire	<u> </u>	Tax Eq		12.00
Unit Cost: \$25.		\$39.00	MSRP:	0.00
Unit: Tota	al Price:	Cos	<u>st</u> <u>Sell</u>	
pr 🔹	\$39.00			
	Cal	ble/Hard:	\$0.00 SI	0.00
Shipping:	Total Installed	H	de	
\$0.0	00 \$56.00	0	otion	
Apply changes	to			
This item only				
A) A	es of this item in this Bio	1 1 and in Master Produc		
All occurrence	es of this item in this bid	and in Master Froduc	2	

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.

roduct Info		Favo	orite	InActive	Add Ne
Model (requi	red):	UISC	or Rinded	Inverte	
AVR507					
Description ((required):				
7.1 Surround P	rocessor				
Supplier:					MEGA SPE
B&K			•	Mfg Number:	Michael Children and Children a
Category:				AVR507	
Audio			•	Mfg Name:	
				B&K	
				UPC:	
Features:					
Equipment		User	Excellence:	kBooks	
	Labor	User	Inventory Quic Adjustment Notes:	4	iceive 2
Equipment Main (7) Los Angeles Inventory:	(4)	7.0	Adjustment	Action: Re Quantity: Adj. No.: Transfer/	2
Equipment Main (7) Los Angeles	(4)	7.0	Adjustment Notes:	Action: Re Quantity: Adj. No.: Transfer/ System:	2
Equipment Main (7) Los Angeles Inventory: Product Url:	(4)	7.0	Adjustment Notes:	Action: Re Quantity: Adj. No.: Transfer/	2 Receive
Equipment Main (7) Los Angeles Inventory:	(4)	7.0	Adjustment Notes:	Action: Re Quantity: Adj. No.: Transfer/ System:	2

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.

Project Timeline								
howing Products:	All							
LAST UPDATE	OPTION	HIDE	CABLEHARD COST	PROGRAM COST	INSTALL COST	QBTYPE	WITH IMG.	ON HAND V
03/07/2013 03:19			\$0.00	2.022.034	\$0.00			12.00
03/06/2013 10:11 03/07/2013 03:18			\$0.00 \$40.00		\$0.00			10.00
03/04/2013			340.00	30.00				0.00
07/18/2011	ry Adjustm	nent				×		0.00
07/18/2011						-	1	0.00
03/04/2013 BKT	700			Invent	ory: 12.	2		-150.00
03/04/2013 Main	(12)		Adjustmen			-	V	
03/04/2013				Action:				
03/04/2013				Quantity:	0.	0	V	
03/04/2013				Adj. No.:			V	
03/04/2013			Notes:				V	
03/04/2013								
07/18/2011							1	
07/18/2011(
07/18/2011		-					V	
07/18/2011	ancel	Sa	ve Trans	fer				
07/18/2011							V	

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.

		Rooms 🔂 Bid Settings te VasiDengee Pachase			-	fresh Act Celevidar	Fagert Ter	-				-		
Onate Punituse Onie		and the second second second second												
Houghton Taxe	r Freeh	Ore Job AG	130 : 571	3.AT	11	Surray Ves				-				
Water Rosen Al Rooma			10 -	e Rochain Agenvil	Ga	Datal Unio								
NODEL.	(HEGH)	DESCRIPTION	ORDER (M	10,179,001	104	C deat test	- 38385.441	101001-000	10.05/122	augusts -	B1-500	TITL NUMBER	80.000	ncia
Power Sauch		1			1									
a deca	R0-1100	DLP View Projectur	Flint	Finne							3.00	.0.00	.0.10	
AVRS1/	AVEI507	7.1 Sartourid Processes	Finat	EMK	10	ALC: NO.	12	10	ALC: PO RA	- 63	21,00	0.00	0.00	1.00
Intel	NC1400	Intellicontrol System	Pinish .	ADI	Seat 1.	1000		1		0	0.00	00.0	0.00	
HTB:	R9-1100	DLP View Projector	Finish	Panto	744-536	1.170	101	NT.	15	- 25	3.00	00.0	0.00	
HTS-	HE-1100	DLP Visies Projector	Finish	Funce	744-538	1	- 60	10	12	25	3.00	0.00	0.00	1.1
HTS .	RS-1100	DLP Video Projector	Finish.	Punco .	744-336	12	10	21	15.	10	3.00	0.00	0.00	10
HTE	R8-1100	DLP Viteo Projector	Finish	Punco	744-338	2	100	191	0	10	0.00	9.00	9.00	10
Linnes 105-	Loxus165	185" Diagonal Screen Uhrs	Time	Blewart Planacroser Corp.		18		1	1.64	6	2.00	11.00	0.00	
MAX500	MAX000DBS	Surge Protoctor	Finiph	ADI		121	11	171	-	(1)	49.00	0.00	0.00	-
110/00	78700	Ceding Speakers	Tim	ADI		1	1		10		0.00	0.00	0.00	
AXS	AXS	Equipment Rack System	Finish	TAD			141	11	100	11	0.00	0.00	0.00	1.1

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.

THE .	View Bids	Print	Serio	C GL			oka: Ordine Pibliuch Betresh	Poject Vid	eo Tutoria	ls Registe	e UserG	uide Help	7						
NI)		A		100	(1) (1) (1) (1) (1) (1) (1) (1) (1) (1)	Pachesing	and the second second	Press & Manag	et Pros	et Caundar	Print	Terano	M						
-			_	Saluzia dal		-	Order States Doord		-	. Hi faller		• 144							
	ary.	187	18	499	DESCRIPTION	HOE:	MORE	LIGHTLER	208-08	1000		-	30 800 (0)100	15.938	00000	-	anser!	C TOWNERS	thurses
	8.0	é i	-		Hours - Installati	transfirm.		Inhuse	10	11	11	10.00	10.00			10			
	0.0	¢	je Tr	11 0	Calling Spectare	711700	Spectarcraft.	Capitol				4.00	4.00	0.00	0.00				
			- 10		Carding Tyrestel 6		Constant of the	Galant		10	0°	8 187	6.001			÷0.			
	10.0	0	per Ta	ana in	Centing Speaker#	18700	Sponie stat	Capitol				4.00	4.00						
	10	0	ar D	ini	Dailing Speakers	111700	Speakercreft	Ceptol :	- E3	- 10	10	4 00	4.00			10			
1	4.0	0.	10 11	1001	Colling Symmetry	TH200	Spontering	Caster	- XC	0		4.00	4.00						

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.

DELIVERING A GREAT PROPOSAL

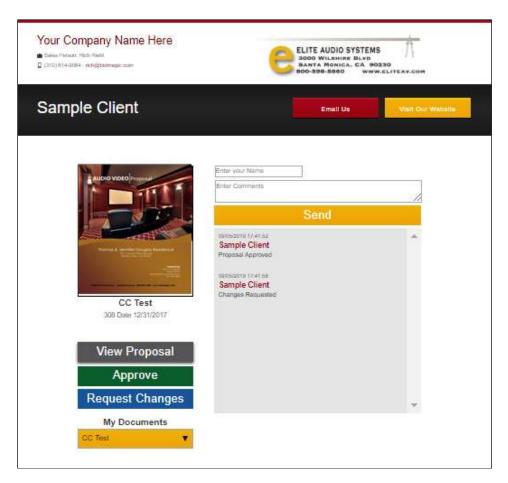
We recommend printing your proposal on your color company letterhead on high quality paper. First class proposals are often contained in a custom printed folder or binder. Your company brochure and the salesperson's business card are also essential. The following pages are printed on your company stationary.

- 1. Proposal Cover page
- 2. Your Cover letter, Company Story and Client References (Opening Document)
- 3. The Proposal Detail and Summary
- 4. Product Images and Information
- 5. Visio floor plan, elevation and rack drawings.
- 6. Scope, Terms, (Contract) & Acceptance. (Closing Document)

NEW Client Center

Check this out! Our new client center delivers your proposals online with a special custom website featuring your company name, graphics, links to your website, links to your email and any comments that you or the client submit.

Your special delivery webpage will include your company name, address, salesperson, email, your logo and a link to your website.



Set these up the Settings/Company menu. Since the salesperson will be receiving email notifications, be sure in Bid Settings to make sure an active salesperson is assigned to the bid. That salesperson will need to be a BidMagic user shown in the User Manager.

🔅 Company Info			– 🗆 X
Company Information			
Company Name:	Your Company Name Here		
Address 1:	30145 Moming View Dr.		
Address 2:			
City:	Malibu	State:	CA
Country:		Zip:	90265
Full Name:	Bob Smith	Fax:	(800) 555-1213
Phone:	(800) 555-1212		Company Image
Email:	company@yourmail.com		
WebSite:	www.yourcompany.com		Santa Monica, CA 90230 Banta Monica, CA 90230 Boo-598-5860 WWW.eLiteav.com
License No.:	CA License 1234567890		Browse Upload Remove
	Save	Clos	se

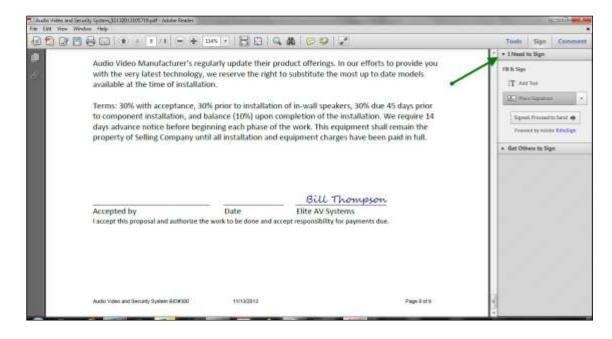
Client Center Tracking

You can access the Client Center from the Dashboard (a small paper clip under the column "Client Center" indicates a link to a bid in the Client Center) or from Bid Settings/Sales Pipeline. When a bid has been submitted via the Client Center, users will be able to see a link to the submission along with a time/date stamp when a bid has been reviewed or approved.

Scal Chart	Schedula Appairement						
Oppertunity Panitree						Sea	and and the
Tarpet Bodget:		62.02				Created 9 62	13 ()+ B(D4) ()
Espected Gose Data:	9/ 5/2019	1941	Last Follow op.	5/ 5/2015	104	D 544	
Suge:	interested.		Lost Fiend:	0	w]	Directive	
Probability			Next Follow Up.	5/ 5/2015	Q+	Lack All Changes (Per	naroot)
Owner	Rut Reh	+	Next Action:		w .	Jub 2 Approved	
Gate code at ann is 70%						Clary Link to Clobowd	
						00110101005	to the No. Of Long
					/	Revenue	9-3-01100-44 PM

Signature Capture in a PDF

BidMagic can output proposals as a Microsoft Word document or as a PDF. No matter how you send a PDF to a client, there are a few ways that your clients can sign off inn a PDF. When a PDF is opened, 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 and 10 have built in Pen features that can be used with a mouse. If you have a touchscreen, then you can use a stylus or even your finger to have your customer sign off directly in a 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.

Image: Strategy Image: Str	Nervine Catage_11132013111238.doc (Carpathen) Noted - Marok
Terms: 30% with acceptance, 30% prior to install prior to component installation, and balance (10% require 14 days advance notice before beginning of remain the property of Eithe AV Systems until all in paid in full.	6) upon completion of the installation. We each phase of the work. This equipment shall installation and equipment charges have been 14 B Bue Bue Bue Bue Bue Bue Bue Bue Bue B

Deliver PDF 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.

		AudioVideoProposal-165435-53gri		S
	Cable company wiring) are o	ot included and will be provided by others.	-	
		regularly update their product offerings, in our effor- gg, we reserve the right to substitute the most up to flation.	Message from Richard Riehl Plenar leview and complete Audol 36p.	II AlaicProposal (85623-
L	to component installation, a We require 14 days advance	. 30% prior to installation of in-sull speakers, 30% dx, of balance (30%) apon completion of the installation recision before beginning succipations of the work, the pisperty of #CompanyMenner until all installation dt.	and equipment	
-	200 C 000 C 000	nature Databastrap		
	Accepted by	Enalt strightings.com		
	Caccept Diss proposal and authors	e the work in he done and accept reasonability for payments do	· .	
	+BidNemeir spectruments	H1077	1941-01	
heshboard	Send Manage Acco			vr Uppreis 🕥 Richard +
Deshboard Ber hy hame a NATOR • Waiting For I	Send Manage Acco r Company • Filter In Company • No to Sign (1)	unt Document Status •) Search Accuments, wegen	en is orden O er frest. Q. talarge B. P AudsWildenFragonal 165625 1 Forem Richard Reis (Introduj	Richard - Or Toblew High Hemistory)
eshboord britis hame a Charles Walting For J Out far Sgir natu@lain.ag	Send Monage Acco r Company • (Filter In Company 0 Me to Sign (0) starse (1)	Document Status 🔹 👔 Search documents, nacion	en ha nomen 🔗 en maat. Q. taslanges 🔒 in Ausdah/MeenProposal 465455 d	Richard + Or Toblew High Hemistory)
Neshboord ber he hame a Char b) Waiting For J Out far Sign rungStalmag	Send Monage Acco r Company • Filter In Company • Mono Sign (80 state (1) prices 1	Document States • Search Accurrents, sease	Aurine O AudoWiteeProposal 45555 Seam Richard Beb (Intrinsity Ta: Riset Sriet) (Intrinsity Ta: Riset Sriet) (Intrinsity	Richard + Or Toblew High Hemistory)
heshboord ber hy hame o Mater 10 Wolting For 1 Out far Sign nutipoteting Signed (1) Robert Smith	Send Monage Acco	Document States • Search Accurrent, wegen Occurrent Tale • Dete = BeMagic Propoul Semple Current - 05/08/2007	mi & nortes O Franz Q, Enlarge B, P AudoWhiteoProposal-MS485 of Form Richard Reif (Inchardia) Tos: Robert Greek (Inchardia) Date: 01/00/2017, 733 PM Status: Signed	Richard - Or Toblew High Hemistory)
heshboord ber hy hame o Mater 10 Wolting For 1 Out far Sign nutipoteting Signed (1) Robert Smith	Send Monage Acco	A Document States • Search Accurrent, wegen Occurrent Tale • Dete = DeMagic Proposal Sample Current • 05/08/2007 AudioMdersProposal V65/05 - 6p. 03/08/2007	mi & nortes O Franz Q, Enlarge B, P AudoWhiteoProposal-MS485 of Form Richard Reif (Inchardia) Tos: Robert Greek (Inchardia) Date: 01/00/2017, 733 PM Status: Signed	Richard -
Deshibuserd Iber hv harne a Notes I - Waiting Far I - Out far Ngru nuhystadinag - Signed (1) Robert Limbi	Send Monage Acco	A Document States • Search Accurrent, wegen Occurrent Tale • Dete = DeMagic Proposal Sample Current • 05/08/2007 AudioMdersProposal V65/05 - 6p. 03/08/2007	mi & nortes O Franz Q, Enlarge B, P AudoWhiteoProposal-MS485 of Form Richard Reif (Inchardia) Tos: Robert Greek (Inchardia) Date: 01/00/2017, 733 PM Status: Signed	Richard + Or Toblew High Hemistory)
 Waiting For I Out for light numphelong Signed (1) 	Send Monage Acco	A Document States • Search Accurrent, wegen Occurrent Tale • Dete = DeMagic Proposal Sample Current • 05/08/2007 AudioMdersProposal V65/05 - 6p. 03/08/2007	mi & nortes O Franz Q, Enlarge B, P AudoWhiteoProposal-MS485 of Form Richard Reif (Inchardia) Tos: Robert Greek (Inchardia) Date: 01/00/2017, 733 PM Status: Signed	Richard Of Tobletu Nigh Printing promision Printing

•

MULTIUSER PERMISSIONS AND FEATURES

There are several levels of access that can be assigned to BidMagic multi-users:

- 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.

lect a Userto Vew or Edit										
SERINAME	FULLNAME	ACTIVE	EMAIL	•	Idd New User	Delete	Jeer.		Seve	Close
admin	Administrator	1	rich@bidmagic.com	Pr	fie Energies	Settings 9	atus Notifications			
Salesperson	Sales Person	1	rich@bidmagic.com							
Purchasing	Purchase Manager	团	rich@bidmagic.com		lsemane			Phone		
Sales 2	Sales 2	193	rich@bidmegic.com	601	Finance			800-598-5860		
Finance	Fennice	2	nch@bidmagic.com		full Name			Email		
Project Manager	Project Manager	(2)	rich@bidmagic.com		Finance			rich@bidmagic.com	6	
					Location Man Shared Path Nar Terglates V Admonstre Can Upda V Can Delar V Gan Upda V Gan Upda V Gan Cale Edit Proc V Gat Cale	ctif of All Bids ate All Bids fe All Bids Contacts it Product es sta	(Peacegr B Che Che Cost - Pa	All Locations Completes All Locations Completes Completes Completes Completes Com		3

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 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:

kart in "C.'.Program Files (r85)'BidMagic7778" hortout key. None kun: Normal window	Security	- 10	Details	Previous Versions
CV arget type: Application arget location BidMagic_7778 BidMagic_7778 BidMagic_exe"/U.Admin /P. BidMagic_7778 BidMagic_7778 BidMagic_7778 Fination Files (x86)/BidMagic_7778 Files (General		Shortcult	Compatibility
larget location: BidMagic_7778 larget: BidMagic_7778-BidMagic.exe" /U.Admin /P; Rart in: "C.\Piogram Files (x85)\BidMagic_7775" hortout key: None Nun: Normal window lonment:	B	dMagic.e	sce - 7778	
arget: BidMagic_7778-BidMagic.exe" /U-Admin /P. tart in "C-\Program Files (x85)\BidMagic_7778" hortcut key: None Aur: Nomal window ionment:	larget type:	Applica	tion	
itart in "C.\Program Files (x85)\BidMagic_7778" ihortout key. Nome Num: Normal window iomment:	larget location	BidMag	ic_7778	
ihortout key. Nome Num Normal window Iomment	Target:	BidMa	gic_7778\BidMa	agic exe" /U.Admin /P:1
ihortout key. Nome Num Normal window Iomment	and and a second	. North Land		
Aur: Normal window	Start In:	"C:\Px	ogram Files (x86)	NBidMagic_7778"
connent:	Shortout key:	None		
	Run:	Norma	i windaw	
Open File Location Change Icon Advanced.	Comment:			
	Open File L	ocation	Change lo	an Advanced

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.

BidMa	
Diana	
PROFESSIONAL PROPOS	AL SOFTWARE
Download will take several minutes. Do no	t close this window, or
ower down the computer.	
Release	
BidMagic 7370 sp	Download only
BMTemplates7370.zip	
http://update.bidmagic.com/release/7.3.7.0/	Restart BidMagic
BidMage	
Program Location	
C:\Program Files\BidMagic	
Template Location	👿 ap BidMagic app
c : ProgramData' BidMagic' Templates	1000
	😨 ap Templatea
Working Storage	
C \ProgramData\BidMagic\Update\7370	
Temp backup at C:\ProgramData\BidMagic\Update\7370	Beckup \
Running	

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.**

Default Settings Status Systems	Rental International	Enterprise	Updates	Job Phases	Pay Period	Automailer
Enterprise Administrator settin	ngs					
Use Campus / Rooms			-	of Recent Bio	d Update	
Use Asset Tracking				der Process		
Enable Large Database Sea	arches	Allo	cate and Ti	ransfer		
Location/Dept.		_				
Use Location/Dept.	Edit		w AdHoc It	ems		
Job Status						
Use Job Status	Edit					
Assign Events to Update Notify	Job Status					
				Do not Notify	r Notify	
When Bid created	B Bid Created		\sim	۲	0	
When marked Sold	D Needs Job Number		\sim	۲	0	
Assign Events to Notify Order St	atus					
Request Purchase Approval	P1 Order Request		\sim		\checkmark	
Approve for Purchasing	P2 Order Approved		\sim		\checkmark	
Print Purchase Order	P3 On Order		\sim		\checkmark	
Product(s) Received	R1 Item Received		\sim			

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!**

	ter to Vew top 500 Total Records: 42 MODEL	MFGNAME	DESCRIPTION	CATEGORY
			1	
м	DOEL	MFGNAME	DESCRIPTION	CATEGORY
	Add Now	100 CAN	a management and	10.0
	Sector Hone Theorem	Digital Projection	DLP Valeo Projector	Video Projectum
	Sillable Service		Keyped is down as door	
	HTDeasan	Samming	Hume Theoree Paskage - Branze	*Budget
	HTGold	Digital Projection	Home Theater Paskage Goki	"Bulget
	HTS	Digital Projection	DLP Video Projector	Video Projectors
	HTSher	Samoung	Home Thuater Pookage - Silver	*Bodget
	PWCam	Inhouse	Prewire Canera Location	*Cabling
	PWKeypad	Inhouse	Presen Keypad	*Cabling
	Warranty Service	11110000	Service	isoninte.
	76.4	Signature	Speaker pable 4 conductor	"Labing
	1892	Honeyvell	Abernate Polaray Qued PIR rectors delector	Auda
	400/1M	Manaser	REA 1 Meter cable	interconnects
	5815	Honeywell	Dese Window Transmitter	Security
	5825	Henrysed	Weekes Security Keyped	Searly
	635-7340	GE Security	Centered # Security Panel	Speakers
	60-746-01	GE Security	Separtus 2003 LCD Alphanameric Touchp.	Benunty
	AVR507	BBK	7.1 Surgaund Precessor	Aude
	AXS	Hiddle Adentic	Equipment Rack System	Rack
	SKTT03	Speakerouth	Speaker Bracket	Accessories
	CATSe	Selden	Category Se nativost cable	Wire/Eable
	CPE	Inhouse	Cummer Provided Equipment	
	CT1000	Creation	Color Wall Touchpanel	Keypeda
	install?b	Inhouse	Hears - Installation Labor	Labor
	Install Labor	Inhouse:	Install Labor	Labor
	KPS101	Audio Access	Music System Keyped	Keypeda
	LX123HST13G38	Steven Filmspeen	Luxura Model A - 123" Motorzad Screen	Science
	446.92.64	Restaurs	E and Destruction	a second s

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 toBidMagic User Guide© 2020 BidMagic Corp.All rights reservedPage 165

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.

	Pitalian Securit				-	The Real Property lies:					
10.00	nio New top SVIII And Records				100	System			Quantity	1.00	AD0
	CIDES.	NECKANE	DESCRIPTION	CATEGORY							100
-			DECKIP CENT	CALIFORNIA	Model LX123HST13G38						
-		11110		and the second sec	100			- UT Basinet's			
900		HEINE	DESCRIPTION	CATEGORY.		Description	Carton Moder a	- Internation			
	inthe Pierre Pleaser	Hotel Providen	DLP View Papeter	Walson Projection			Turotta			Last lipitore	10/3/2014
	es	Digital Projection	DLP Volac Projector	Watere Projection:	- 13					-	1
	ITS No.	Samany	Hone Theater Petkage - Shee	Teciper							
	WEate	Infraste	Protein Caren Laoiter	*Cableg	- 11	Mg Nation	200071			Debut in age	
	Wingpal	Infraste	Preven Kegnd	*Colleg	- 11		-			17 mil 1	-
	Eurosty Server		Sense			My New	Sever Films:	and a second sec		Owinge	
	84	Sprauw	Spearse patrie + sondhattor	Cating		Canadra .	Sowers .				
	962	Terryuid	Abertone Patienty Galaxy 212 restails	Auto		Features	the local second	. er startertak er	0.0111-02	line and	
	32116	Monter	PCA I Vere cable	Inequireds		Padates	inets for use to r	with promote addressed	its which the form	 photographic and 	10744.811
	015	(brayval)	Date Webber Tratemitter	Search	- 19		street of the Lords of	tate 2 is a serie of a	and of Destation	the second sec	contraction for some
	118 Co.	Received	Namual Security Carpani	Security		India Refer					
	B-SKI	GE Security	Canada 4 Security Panel	Spectro		and the second se					
	5.746-in	CE Security	Saintin 2001. CD 484 mores	Servitz	_	Contrast Lat	eet.				
	(REAT	Sec	11 house based	Baller		Onler Please					and an
	EA	Making Arlantin	Reviewer Sed System	Fand		(Ter					871.00
10	within a	Speakersel-	Syster Parles	Assessment .		the Get	Maker 5		Tel Cale	and a	
- 0	x25e	Rabler .	Damping for restored valide	WeiGate	- 14	100.000		E.484	1	800	
b	29	bhanes :	Conver Provided Support			Contraction of the local division of the loc	100 million 100	\$1,400 B	1.1		
10	frem .	Destroy	Cale-Wat Southperel	Terrain.		the Sea	é Pikat		SHE.	- 24	
1	and the	bibeline -	Hanne Josepherer Latter	Labor .		38.11 P	\$1,494.00				
1	mini Taler	artesan -	Senal Later	Caller)				Calendard	15.00	100	
	PRIDI	Sarie Arrient	Music Yosters General	Repairs		1000		10 C 10 C	1000	Contract of the	550
· 10	12348113488	Swoer Vinaner	Long Westeld 121' Metermet B.	Brisano		Salitad	Total bestal		2188	T Price Law	
10	100000	Paramer	Surga Presenter	Senatorrier		. 875	111	100.00	Ceter		
1	19.8	Chail Hg	Large Les Perils Far Panel Hore	Burn							
1	CHICKLENDED .	- Seron	PLEASANDERT LTD Weighter	Vitian Discretion		Apply changes I					
-	AC PRIMA PRIMA	Samery.	ST Plane TOTY	Peprise Tr	1	# Tuberth					
-		Selection in the selection of the select	the local the same	Star Parts	- (*)	C. Recovered					
			1000		100	O Kulawa	and the barrie to	to Bid and in Masin	Pasta		

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

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.

	Quanti	ity 1.00 💠 ADD
Model: Mis	40	🛅 AdHo
Description:	Type The Description Here	
	E Favorite 🔪 🗌 Asset Tracking	a 🔰
Supplier:	-	MEGASPECS
Mg Number:	Misc 34	Select Image
Mig Name:	Description is Required	Clear Image
Category:	* SubCategor	v: •
Install Note: Equipment La	bor	create Adhoc (temporary) Products
Order Phase:		Inventory:
Unit Cost:	Markup % Sell Price:	MSRP:
\$0.	0.00 \$0.00	\$0.00
Unit: Tob	4 Price: Cost \$8.00	Sel
	Cable/Hard: \$0.0	s0.00
Shipping: \$0	Total Installed Price: Hide 50.00 Option	
	to	

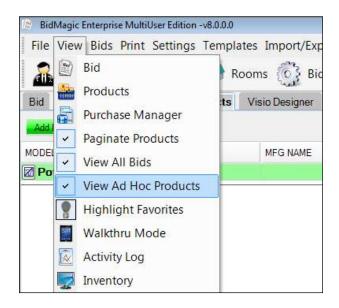
lew test	produ	uct	Click barto se	elect a differe	nt Product	
Model:			New	test product		
Description:	derer	2				
	🗐 Fa	vorite 🔽	AdHoc Quantity:	1.00	A.	
					MEGASPEO	
Room:	Audio	System	- /	•	Select Imag	North
Afg Number:	3	test product			Clear Image	
Mfg Name:	-				Clear mag	
Features						
Features:			with permissi			
Features:		products	can right cli	ck on a p	product	
Features:		products in a bid a	2011 (C) (C) (C) (C) (C)	ck on a p dhoc pr	oroduct oducts	
Features:		products in a bid a	can right cli and elevate A	ck on a p dhoc pr by unche	oroduct oducts	
		products in a bid a	can right cli and elevate A ar products I	ck on a p dhoc pr by unche	oroduct oducts	
		products in a bid a to regul	can right cli and elevate A ar products I	ck on a p dhoc pr by unche	oroduct oducts	
install Note:	Labor	products in a bid a to regul	can right cli and elevate A ar products I	ck on a p dhoc pr by unche	oroduct oducts	
nstall Note: Equipment	Labor	products in a bid a to regul	s can right cli and elevate A ar products I this bo:	ck on a p dhoc pr by unche x.	oroduct oducts	
Install Note: Equipment	Labor	products in a bid a to regul	s can right cli and elevate A ar products I this bo:	ck on a p dhoc pr by unche	oroduct oducts	MSRP:
nstall Note: Equipment Order Pha	Labor	products in a bid a to regul	can right cli and elevate A ar products I this bo	ck on a p Adhoc pr by unche x.	oroduct oducts	MSRP: \$0.00
Install Note: Equipment Order Pha	Labor	Markup %	Sell Price: \$0.00	ck on a p Adhoc pr by unche x.	oroduct oducts	

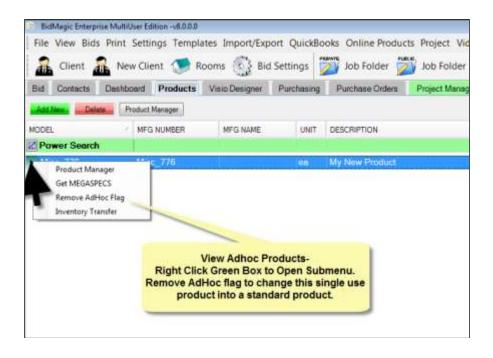
d Contects Deshi	breok	Products	Visia Designer	Purchasing	Purchase Orders	Project Manager	Project Calendar	Project Timoline	
AALIAna Colesa I	Product I	Nacager					۵		
ODEL .	MFG	M,MBER	MPG NAME	UNIT	DESCRIPTION		FEATURES		SUPPLIER
Power Search	1								
Misc 776	Mist	776		ea	My New Product				
Misc_779	_	779		.00	beg of nais				
Moc 761	Max	761	sony.	66	keypod				
Product Manager		_782		68	misc 782				
Get MEGASPECS	- 4	783		68	temp				
Remove AdHoc Flag	1-	784		-08	esdfadfs				
Inventory Transfer	-	788		68	stitutettette				
and the second s	_		Click or	lisc_AdHoo	Product to a full /AdHoc Products ow selector, then	Alexandra e			

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.





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.

🔅 Company Info				
Select Location	n to view or edit Main		•	Add New
Company Informa	tion			
Locat	tion: Main		MN	
Company Na	arne: Your Company Name Here			
Addres	ss 1: Address			
Addres	ss 2 :			
	City: City	State:	ST	
Cour	ntry:	Zip:	Zip	
Pho	one: (800) 598-5860	Fax:	(800) 598-5860	
E	mail: company@yourmail.com			
Webs	Site: www.yourcompany.com			
License	No.: CA License 1234567890			
	Delete	ave	Close	

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.

b Status			x
Status	Description]	
X	No Action	Add New	
В	Bid/Service Ticket Created		
D	Sold, Needs Approval		
E	Jobsite Survey Completed	Job Status	
F	Job Ready to Start		
G	Job in Progress	Description No Action	
H	On Hold, Needs Resolution		
J	Job ready to be invoiced		
0	Job Completed	***	
Р	Paid in Full		
S	Service Call Needed	Delete Close Save	
Z	Job Lost or Dead	Close Save	
•			
Order S	tatus		
P1	Order Request	P3 On Order	
P2	Order Approved	R1 Item Received	

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.

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.

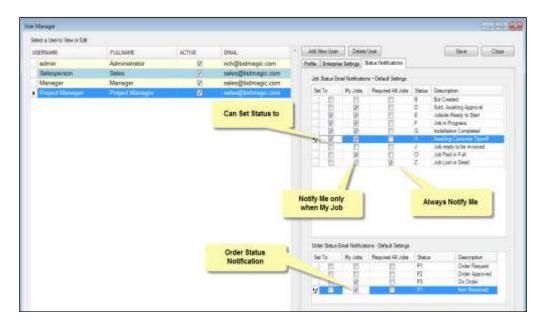
Click preferred status MY JOB below to include this user in notifications for their preferred statuses that were defined in step 1.

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.



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)

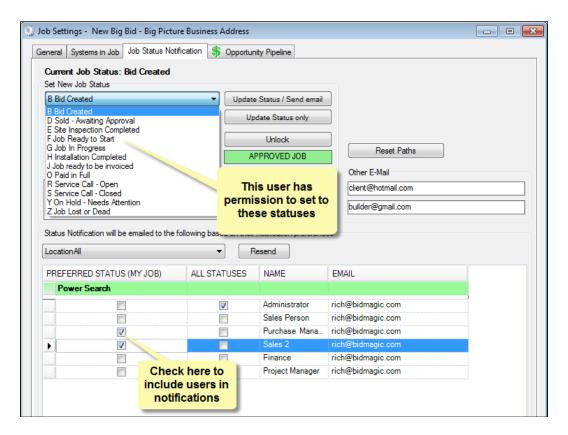
Users can setup automatic email notification preferences. For each Job Status choose to be notified for My Jobs or Required for All Jobs. The first column Set To checkboxes display statuses a user has permission to Set To. In the example below, the user has permission to advance the status to Job ready 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.

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.



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.

Set To	My Jobs	Required All Jobs	Status	Description
			P1	Order Request
			P2	Order Approved
	V		P3	On Order
0		V	R1	Item Received

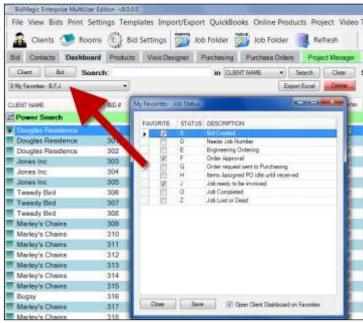
Job Status Filter (Enterprise)

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.

	Templates Import/Expert Quick Rooms (C) Bid Settings				- unit cause inter							
	data NumDargar Pachase	-		and the second second	Frank Tenaine							
Det St												
14 Ba	+ Man	•	Enert Eater									
ue ue John Million Million	60 MARE	80.4	STATUS DESCRIPTION	100.0	5423144	PRIME	100.00	24243)	757	10,000	~(3)*	
3.40 Beview 3.50 Processor (2.7.) 40 Principal Vila Abour	Benedict Canyon Home Fleet	222	la construire	322	- fam	bil Metheno	\$51,879.80	- 21	04/24/2013	10		
Bd Ceanal Sold - Availing Approval	Web Construction of the	216	B - Bit Creetvid	318	Abranshitter	Administer	\$1.428.21	1000	04/18/2015	0.014		
Site Inspection Completed	DFDI8	217	B - Bill Creetod:	313	 Administration 	Administrator	\$83.50	- 38	D4/18/2015	- 23		
id: Pleady to Start	Isunck test	216	B - Bill Created	20	- Abranistowor	Adventures	\$48,873,25	1000	04/18/2013			
restaur Corpord	new ta 353	527	B - Bit Created	3(2)	Abreletator	Admentista	\$1,134.50	1.98	05/02/2013	10		
In mails to be involved Pad in Full	bid0500713	328	B - Bid Created	201	- Admanatures	Alterates	\$233.55	0.00	05/02/2015			
Other Request	050013m	329	B - Bid Created	205	Administrator	Administrator	54.40	1.18	05/02/2013	10		
De Order	Charge troke 7	330	6 - Bid Created	330	P Admenistrator	Administration	(\$10,225,02)	12.4	06/02/2015			
Service Call - Caren Service Call - Classi	tasi5513 no at s2	333	B - Bid Creetod	335	- Administrator	Administrator		- 96	06/67/2013	· · · · · · · · · · · · · · · · · · ·		
Dori-Auto - Naisada - Materiani	test riupe 1988	354	B - Bid Creeted	334	- Administration	Advantagetter	\$100,000.00	0.00	05/67/2013	1.123.2		
20 Log of Dead	572013 na wt	335	8 - Bel Greeted	305	- Advaivistrator	Administrator	\$47,778,73	- 36	05/07/2013	- 83		
the Peters Business Alterest	availant.	126	D - Sold - Availing Approval	200	Advantage	Administration	\$5 314 14	10.9	D4/25/2015	DEPOSIT		

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.

Note: These settings apply to all user							_
efault Settings Status Systems	Rental International	Enterprise Updates	Job Phases Pay Pe	fied			
Enterprise Administrator settin	gs						
Use Campus / Rooms			y of Recent Bid Update				
Use Asset Tracking		Use 3-Step Or					
Enable Large Database Sea	rches	Allocate and T	rander	Evente Tria			
Location/Dept.		Allow AdHoc 1	2010	Events Trigg Automatic J			
Use Location/Dept	Edit	Allow AdHoc I	berna	Status Upda			
Job Statius							
🗹 Use Job Status	Edit		/				
Assign Events to Update Notify J	ob Statue	/	Do not Notify Notify				
When Bid created	B Brd Orested	1	0.0				
When marked Sold	D Needs Job Number				Choose to Send		
winers manyed build	D needs Job number		0 0		email notification	s	
Assign Events to Notify Order Sta	fus						
Request Purchase Approval	P1 Order Request	1.4					
Approve for Purchasing	P2 Order Approved						
Pivit Purchase Order	#3 On Online						
Productia) Received	R1 tem Received						
100000000000000000000000000000000000000	And a state of the		1022				

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.

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
А	Bid Created	S - NM	NA			
В	Bid Sold	S - NM	NA			
С	Job Approved	- NM	S - NA			
D	Jobsite Survey Complete	- NM	NA	S - NM		-NA
Е	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		
Н	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 notifications 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.

			a dia akto a ala ata di Otatua	
J Jobsite Ready for Work	User c	an see ar	nd set to selected Status	5
D Site Survey Completed J Jobsite Ready for Work		pdate Status only		
O Job Completed H Rack System Complete C Sold - Needs Job Number		Unlock		
L Jobste Secure - Final Install		APPROVED JOB		
P Ready to Invoice Q Paid in Full	-		Other E-Mail	
				-
Status Notification will be emailed to the	following based on the	eir notification preferer	nces	
		eir notification preferer	nces	
ocationAll		and the second second second	EMAIL	
Status Notification will be emailed to the LocationAll PREFERRED STATUS (MY JOB)		Resend		

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.

fault Settings				
Note: These settings apply to all users and to all new Bid	ds. To view or edit settings for individual Bids, open the Bid and click on Bid Settings			
Default Settings Status Systems Rental Internation	nal Enterprise Updates Job Phases Pay Period			
Enterprise Administrator settings				
Use Campus / Rooms	Activate Notify of Recent Bid Update			
Use Asset Tracking	✓ Use Service Job Feature			
Location/Dept.	✓ Use 3-Step Order Process			
Use Location/Dept.	Allocate and Transfer			

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.

He Contacts	Daritand	Peters	Vivio Demgran	Furthers	Further Other	Project Managar	Triject Calend	 PopelTreales 						
Grante Parchase On	dem/Track Iron	erizy and had	ulation											
Roght 1	lae Fa	aab	est = 1	Job #336	5713 AT		Survey V							
New Please of Fine					Tes Frethere An	erest 🔹 🦛	Deal Ve							
MODEL	ADOM:	ury .	UNIT MILE NA	IE IPS	4	ESCREPTION .	CYLLDI PI	SUPPLIDE	FD.8	internet V	stopi are	and the second	NIM/E	autor.
Power Seath		a star i set	the pass	11		anima-			1000		1 - I			
E HTS	Bekung	1.05	an Hanni	125	T100 D	P View Projectie	Frut	Ratio	744-230-	STEP 1	0			
HTS	Cotory -	1.00	es Buhic	15	1100 0	LP Veleo Projector	Finish	Rate	744-330-		1.1	1.16	1. D.M.	
HTS	Bekany	1.00	es Runco	RS	1100 0011	LP Valvo Projector	Frish	Ranzz	744-338-	選	arrest a	10	- 2	10
HTS	Belcong	1.00	ee Flunco	ES.	1100. D	UP Yoleo Projector	Feah	Runce	744-300+	8	STEP 2	10	0	0
1.0008185	Balcony	4.00	es Siver	1 1.00	18 185 18	35° Diegonel Screen Ultri	I Tam	Stewart Filmscreen Corp.				-	1 12	10
MAXISTO	Bakcey	5.00	es Pecare	ex MA	kboodes s	arge Protector	Fieldt	NCH .				STEP 3	0	10
TR/00	Bekuty	10.00	pt Speaks	ricialt TR.	100 0	eiling Speakers	Tee	ADT		1			1	1
AXS-	Eakore	5.00	as Middle	Abartic AXX	6	Exprient Reck System	Finish	ACI .				1	0	100
HTS	Belcory	1.00	es Autor	P.9	1100 0	LP Velec Projector	Frish	Rance		(*1	15	-21	125	(*)
AVR507	Bakone	3.00	## E6K	10.15	807. 7	1 Surround Processor	Finat	BSK		官	14	1	1	171
letal.	Bekore	5.00	es Nies	NC	455 14	tellecentral System	Finish	ACI				0	D	10

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.

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.

al Dwinos	d Poders View	Despire Patterns	Rotan Doko	Prost Stange Pro	et Calentar (Provid Timeline)	-	-							
40.	30	- Harman Theosther Signal	-	Order 3	Rotan Dow A	Cede Punhose Order Brunse PO Fielder	1							
100410	ROOM	IFC NVE	MODEL.	WEAT	DECEMINA	g-bpot to biox	PIRSE	SUPPLIER	100000	-	1023-00	4.0001	ertor	-
5						PO etach Stepping Kunter Ferent Puchase Solution								
a Mor	Webie Room	.Fisitor	HTS	RS-1100	TILP Mon Pressor	-Create Packing List	Tight	Rent	10					
Mon .	Media Room	B&K	AVERSOT	AVR507	7.1 Saround Processor	PL start Second lineter	- Fruh	B&K.	101	Ð	0	Ö.	(3)	
Mein-	Media Roam	Monster	400/1M	Inter403/1M	RCA1 Motor cable	12.00	ee Finish	Ceptol	0	8	6	6	6	
Merri	Media Room	Разатач	MAX500	MAXBIEDES	Surge Protector	3.00	es Finish	Capitol	0	10	11	0	0	
Main:	Media Hoom	Panamax	MAX500	MAX500DBS	Surge Protector	3.00	ea Finish	Capitol	10		0	10	0	
Man	Media Room	Speakercish	18706	T11700	Calling Specials	6.00	pr Tren	Capez	101	0	b	B	13	
Main	Neda Room	Middle Adartic	AXS	AXS	Equipment Rack System	3.00	ia Finih	Capitol	10	11	15	15	87	
Mon .	Medie Room	Pasanex.	MAKSOE	MAXMODES	Surge Protector	3.00	up Finah	Cepitor	10	0	10	0.	0	
Main	Media Room	Mes	intel .	NC1403	Intellicontrol System	3.00	ea Finish	Capitor		8	15	15	8.	

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.

Include Costa	
Do you want to show	v Costs in the Purchase Order?
Ship To	
Office Location	Man 👻
C Jobste	
UPS, Fed Ex, or other Si	Nopment Tracking Number:
	<u></u>

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.

6.Aver D	NAME OF TAXABLE PARTY.	222											
The state is	ids Pere Tettings Terrala	in inpublicant	Guildinks Coloral	Sodate Pripe	Unit Lands September	ar illus famile innig							
2 00	. 🛪 🛶 🚯 i	there wanted	Inte Problem										
	1.00	and the second second											
c Contros	A Prototo Liter Serane	Porteens Portee	E.Scotte L. Wasser, Hara	een 1 Annual Cale	Contraction of Contract								
40 E	Selec	CALLER !!	1	Order Status	Orier Aprovel	Over Punteer Onler	+ 0.						
apcato	.con biare	10000	AVE NOT	I NOTES	Celer fore	(BERINPISOS	arr rok	UNIT PAIRE	5100.00	ana ing	10020-000	and the	200
10					Thir Sectored Other Sectored								
Marr.	Horse Thanks System.	Mails Room	Parco	HTE	Date Approved	DLP Video Projector	3.00	od Frish	Renn	- 18	10		1
Marr.	Home Theater System	Media Floory	BAK	AVR517	Ch Cide	71 Settend Potence	3.00	on Firink	- MAK	- 11	171		122
Main	Home Theater System	Menie Floorn	Monster	400/TM	Market ADD 194	RCA 1 Meter coble	12.58	on Finish	Capitol		141	-	- 2
Mail.	Number Tilmater Stylines	Media Room	Fateras	NAUCODO	MANSBOORD	Surge Froheter	3.00	int Front .	Gautor	1.	111		1000
A MART	Carrie Treater System	Mean Dank	- Penaltin	MARCOD	INVESTIGATION	- Surga Protocor		we front	Capital		14	- 18 - I	E.C.
TT MAN	Depart Theater System	Matta Hoam	Speakerset.	TRODE	TRODUC	Colory Speaktre	6.00	pr. Tues	Casing	10.2	00	1000	-
Maire	Home Theater Dystem	Medie Room	Maldia Alterrit:	AXS	AXE	Equipment Rack System:	5.00	or front	Capitol	98. ·	(8)	0	
IN MARY	Interes Theorem Symmetry	Masia Figori	Fatanas.	344/0500	MAX BOOKS	Surge Protector	3.00	out Fault	Capitol		111		

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.

	the state of the s	Contract (Association	Parmenta Andres	Contract (1) and the	HAV I FLORE LABOR	That here												
*	-	All Parts			marmen Tr	herman (d.)	(werhalter 1986	3.8										
14	1000	And a local division of the local division o	4113.008	CROSS-	internal int	DEELEWITED .	477 1914	HAT PARE	1077-00	1.000	1000	-		-	mare i sena		1.000	
18	1000																	
i.	1	Description 1	- W	1985	were used as	CONTRACTOR OFFICE		and freedom.	Party of the local division of the local div		. 10					5.80		
8	Marri	Detrory 1	Apaten	8804008	MAXMOOID1	1 Things Pronerter	3/20 28 181	- we from:	Caulas?		- 41				- 21.	110/00	- 13	
e	6.fm	Fast-terre 1	Paramon	ANORNE	4440/00/00/0	Burge Protected	3 (0) 29 (0)	an From	Dette				. 8	C		113.80	10	
*	Man	Determine 1	Antonio	AAAAR28	ALCO NUMBER	Rapp Francisco 1	5.00	An Person	Depend		121			1000	1.1	118.80		
ñ	Line	Names 1	Aures	1000	FUE-1208	USE Mare Personer	2.80 2.80	an From-	Famori	10			10	-		-9.80		
i	Married Woman	Second Second	Paratan .	AWW	WATERFEE	Burger Protection 1	2.00	and Person	Tanket		100		-	-		196.60		
2	Line .	Findeman 1	Parameter	AMURINE	MARINE (Burgs Platenter	2.00	at from	Desired	-		100	11			1212 000		
		Loss over 1	Annes	4442424	MARCONTRACT	Barger Planner	3.80	at from	Canad							19.00		

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

	1	The long los	And Annual In-	r Gaadhan Sena 7 mean 1975 a	teach least to	inform have be	Side Tele												
1200	-			-linite	Contraction of the local division of the loc														
+ [Mi field	teres (Dates Tree) Bel.	-	Date Rates 1-	these and in	and Tool on Line	14.6											
1000	100.1	8008	and Logist	8000.	804	oppenence	379.0704	UNIT HARE	10.07000	-	-	-		-	-	-	-		-
20																			
1. 1de		Redman 7	Vanne	HTN.	1001100	DEP Men Promise	1.09	an Profil	Burne 1	10	10	101	- 61	- 63 -			-9.26	0	
C Ma	100	Robinson L.	Provinces.	MANDER.	WAXAARD BEEN	Rouge Products	102 38 855	an Dean	Copie 1	100	100	ALC: N	1.0				100.00		
1.44		Buildings 1	Panarate	MARKE	BALANCE PRO	Early Protector	8 (28 24 925	: we Finan	Ceptel	10		- 21		11			12.80		
1.0		Party and Lot	Contraction of the local division of the loc	and the second se	A COLORED	Read Frankson	- AL.	- Tree	-		1.1			1.1.1.			1111		
i i da	sin.	Builtness T		新物理したという	11300	ELP Veloc Projector	2.08	an Front	Burn	100	0		. 0	- 20 -		- C	-6.80	0	
ŧĸ.	100	Robert L.	Pate	Saluthani Menger	ENDER NO.	Range Promotor -	210	an Drait	County 1								C (14) (4)		
1.1.	145	Partners 1	Pressentat	MALEN IN	BAUK/ORCO/	Garga Photostor	1.00	an Fyrian	Depte	- 80	-	- 11		- E			+1.80		
10.040	22.94	Reducer 1	Personal	HALONIA .	Contractory of the local division of the loc	Surga Protector	104	on Firms	Contract of Contra								42.20		

Purchase Notes (Pro/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.

1	t Products Visio Designer Purchar	Hig Furthase Orders	Piget Ma	and the second second						
b:	Select a Job	(a.e., 00.000		Order Status	Shaw Al	-	Browse PO Folder	h		30
LOCATION	ROOM	Bidhem PO Notes					Contraction of the local distance		QTY .	PO#
4		ten information					14			
Main	Home Theatre	Bid Number:	300					sanel	1.00	13-30
Main	Home Theatre	Job Number:	300-					prk cabie	100.00	14-30
Main	Home Theatre	See resident	100					or	1.00	15-3
Main	Home Theatre	Rem:	Intel					ussor	1.00	16-3
Main	Home Theatre	Description:	Intellicontr	ol System					1.00	14-3
Main	Home Theatre	Mg. Name:	Nies		Supplier	Capitol			2.00	
Mein	Home Theatre							anductor	150.00	14-3
Main	Home Theatre	Note History						ystem	1.00	20-3
Main	Home Theatre		31 PM Lode	win). This is a special	note for purchasin	g. Buyin 10 pao	ka for best	1001	1.00	20-8
Mein	Balcony	decourt.							1.00	
Main	Family Room							ronty	1.00	
Main	Kid's Bedroom							- Bitable	1.00	
		Add New Purchase Add a new purch	10.000							

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

Stational Street at	Malaine Spine 1211											
File New Birs /	Wolt Settings Templetes &	epert/Expert Qav	Micola O	Nine Products. Project 1	lideo Tutor	als: Regime	r iseri	AGE Held				
A Clarke	Room 🛞 Bel Setting	a 🔄 leb fekk	n 🖬 k	in Factor 📑 Betrach								
the second se	Dattered Poders Ven	and the second second	And the second se	Task Colors Project Mar	nger Pro	ect Canadar	Prest	Tinetes				
Com Partice Do	on/Track treatury and Indultate	w										
Phonal House	p.n. Feet fine	300 7	CHEHLE A	W and Sociality System								
Non Albora			dam?	vistee (Ner	(e.) (des	Arrest						
HOBEL	DIV LMT . MILE	NGIMAE	DIFFUER	UDDAFTON	-	-	-	1111-11-11-11	-	-	-	(EP44, IKANER & NOTE
Paret Start	the second second											
HER	3 03 es. R0-1100	Face	Fana	DLP Video Projector		17		6 10	8.09	192	1.72.11	
AV4003	100 89 417007	CAN	355.	3.3 Bortourd Processor	12	12	8.00	8.80	8.68			
400/1M	3.00 eg/inter400/1M	Moneter	Center	FICA 1 Mater ratio	- 14	10	0.00	1.00	8.00		10	
MAXODE .	1.00 BA MAXEBOORS	Palaras	Carrol	Starge Prosector	18	10	0.00	8.00	8.08		100	
MAX501	1.00 ex MAXSOC:ED	Paradata	Castar	Surge Protectal	- M		8.08	8.00	8.00			
THIOS	1.00 87 18/208	Summer or et /	Carton	County Speakers	10	12	0.00	8.00	8.08		D	
ANT	1.00 00.449	Alabella Alleritti	Contra	Dissement Rock System	100	15	0.00	214	2.00		12	
TT trial	1.00	fielden .	Canter	Printermond System	-0	0	8.00	8.00	8.00		1 11	

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.

olivit Info							
Model							
400/1M							
Mig Number:							
Inter400/1M							
Mig Name:							
Monater							
Description:							
RCA 1 Meter cabl	e						
Features; High quality starse R							
From: Main. (2)			Transfer	Action:	Transf	ier On-Hand	•
14301 123		1.0		Action:	173016	er Un-Hand	10.00
		_			-		4.0
Inventory:	2.0			Quantity:			1.0
Inventory:	2.0			Quantity: Transfer No.:	12345	i.	10
Inventory:	2.0		Notes:	Transfer No.:			10
Inventory:	2.0	•					10
Inventory: To: Los Angeles Inventory:	0.0	•		Transfer No.:			10
Inventory: To: Los Angeles Inventory: Transfer Histo	0.0		Transfer	Transfer No. : for Geoff Thomps	on Job		10
Inventory: To: Los Angeles Inventory: Transfer Histo DATE SENT	0.0] "Y	an	Transfer	Transfer No.: for Geoff Thomps SOURCE LDC	on Job	SENT BY	10
Inventory: To: Los Angeles Inventory: Transfer Histo DATE SENT T1/20/200	0.0 ry 13 10.05 PM	QT	Transfer Y 11.0	Transfer No.: for Geoff Thomps SOURCE LOC	on Job	SENT BY	10
Inventory: To: Los Angeles Inventory: Transfer Histo DATE SENT T1/20/200	0.0] "Y	QT	Transfer Y 11.0	Transfer No.: for Geoff Thomps SOURCE LDC	on Job	SENT BY	10
Inventory: To: Los Angeles Inventory: Transfer Histo DATE SENT T1/20/200	0.0 ry 13 10.05 PM	QT	Transfer Y 11.0	Transfer No.: for Geoff Thomps SOURCE LOC	on Job	SENT BY	10
Inventory: To: Los Angeles Inventory: Transfer Histo DATE SENT T1/20/200	0.0 ry 13 10.05 PM	QT	Transfer Y 11.0	Transfer No.: for Geoff Thomps SOURCE LOC	on Job	SENT BY	10
Inventory: To: Los Angeles Inventory: Transfer Histo DATE SENT T1/20/200	0.0 ry 13 10.05 PM	QT	Transfer Y 11.0	Transfer No.: for Geoff Thomps SOURCE LOC	on Job	SENT BY	10

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.

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.

Job	Purchase Order	
308	308-002 - Capitol	
Ubdate F	Urchase Order	
G The	tem (45132) only	
₩ Att	ms on Furchase Order	
UPS, Fed B	ix, or other Shipment Tracking Number	
1234566		
Cancel	1	1.0

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.

🔒 Cleats 🔇	🖗 Rooms 📈 Bid Settings	3ob Folder			
and a construction of a cold	Products Visio Designer Purcher	se Mgmt. Project Mai	rage	Project Calendar	Project Timeline CRM Portet
Manage/Create Pu Search:	in in	Î.	•	Search	Clear
Job:	All John	TRACKING# - IN LOCATION	4		nder •
PD #	Nectoda m	JOB # STATUS MODEL		3064	STATUS
PurMgmt-001		MFG NAME		300+	F Order Approval
PorMgmt-002		SUPPLIER TRACKING#-OUT	-	300-	F Order Approval
PurMgmt-002		Main3		300-	F Order Approval
PurMgmt-003		Moin3		300-	F Order Approval
		Main3		300-	F Order Approval
		Main3		300-	F Order Approval
		Main3		300-	F Order Approval
10 C		Main5		300-	F Order Approval

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.

Clients		🛃 Bid Settings 💋	t QuickBooks ProductLibrary Proj Job Folder	ect Manager	video lutor	als Register UserGuide Re	ip.		
Eid Client Dashboar	d Producte Visi	e Designer Purchase M	prd. Project Manager Project Calenda	Project Time	ine CRM P	fortal			
	and the second second	entory and Installation nish Clear	PO #: Job #30)5-: new bi	d 99				
Room: Al Room			Stew Detail	Send P	O to GBooka	• Go			
MFG NAME	SUPPLIER	MODEL.	DESCRIPTION	CROSR NOW	ON ORDER	THICOUS	RECEIVED	MOTALIAD	RECEIVENCE
B&K	B&K	AVR507	7.1 Surround Processor		1	FEDEX 569-25447890	111	10	
Middle Atlantic	Capitol	AXS	Equipment Rack System	10			10	13	
Runco	Runca	HTS	DLP Video Projector		10	MANUAL MANAGEMENT AND A STREET			
Niles	Capitol	Intel	Intellicontrol System	12	1	FEDEX 569-25447890		8	
Penemex	Capitol	MAX500	Surge Protector	121	Z	UPS 30745621		0	
Speakercraft.	Capitol	TR700	Ceiling Speakers	W.	1	UPS 30745621	11	B	8

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.

	04- {sample for PO} dmin 🛛 🗸		-		7/01/2013 8/28/2013	•	
View Filtered Results Reset Export to Excel Close 12 record(s) filtered.							
lob Log Inventory	.og						
USERNAME	DATE	JOB NAME	JOB NUMBER	JOB STATUS	ACTION	QTY	PRODUCT MOD
Power Sear	ch						
🕨 admin	08/09/2013 09:33 AM	sample for PO	304-	J	OrderPlaced	3.0	Intel
admin	08/09/2013 09:33 AM	sample for PO	304-	J	OrderPlaced	3.0	AXS
admin	08/09/2013 09:33 AM	sample for PO	304-	J	OrderPlaced	6.0	TR700
admin	08/09/2013 09:33 AM	sample for PO	304-	J	OrderPlaced	3.0	MAX500
admin	08/09/2013 09:33 AM	sample for PO	304-	J	OrderPlaced	1.0	Intel
admin	08/09/2013 09:33 AM	sample for PO	304-	J	OrderPlaced	1.0	AXS
	00,000,000,000,000,000	sample for PO	304-	J	OrderPlaced	150.0	16/4
admin	08/09/2013 09:33 AM				OrderPlaced	2.0	TR700
	08/09/2013 09:33 AM	•	304-	J	Orden laced		
admin		sample for PO	304- 304-	1 1	OrderPlaced	1.0	MAX500
admin admin	08/09/2013 09:33 AM	sample for PO sample for PO			0.000		MAX500 CAT5e
admin admin admin	08/09/2013 09:33 AM 08/09/2013 09:33 AM	sample for PO sample for PO sample for PO	304-	J	OrderPlaced		CAT5e

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.

Location: All Loc	ations		•	Include products without inventory			
Export to Excel	Close			33 record(s) filtered.			
PRODUCT MODEL		QTY. ON HAND	QTY. ON PO	DESCRIPTION	CATEGORY	MFG. NUMBER	MFG. N
				Speaker 🛛			
16/4	Main	0.0	0.5	Speaker cable 4 conductor	icharata dar filter e	riteria for DESCRIPTION.	Signat
400/1M	Main	0.0	7.0	RCA 1 Meter cable	Interconnects	Inter400/ IN	Monst
AVR507	Main	0.0	4.0	7.1 Surround Processor	Audio	AVR507	B&K
AXS	Main	0.0	3.0	Equipment Rack System	Rack	AXS	Middle
CAT5e	Main	0.0	0.0	Category 5e network cable	Wire/Cable	CAT5e	Belder
HTS	Main	0.0	4.0	DLP Video Projector	Video	RS-1100	Runce
Install Hr	Main	0.0	8.0	Hours - Installation Labor	Labor	Install Hr	Inhou
Install Labor	Main	0.0	10.0	Install Labor	Labor	Install Labor	Inhou
Intel	Main	0.0	3.0	Intellicontrol System	Remotes	NCI400	Niles
MAX500	Main	0.0	9.0	Surge Protector	Accessories	MAX500DBS	Panar
MTRUB	Main	12.0	0.0	Large Low Profile Flat Panel	Mounts	2280306	Chief
SCB	Main	0.0	0.0	Basic Service Call - Billable	Labor	SCB	Inhou
SCW	Main	0.0	0.0	Service Call - Warranty	Labor	SCW	Inhou
TH-42P	Main	0.0	1.0	42" Plasma HDTV	Video	TH-42PX75U	Panas
TR700	Main	0.0	4.0	Ceiling Speakers	Speaker	TR700	Speak

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.

	In Use	D/E Reg	Description	Define Labels
•	2	P	Seral Number	🗭 In Use
	P	P	Asset Tag	Data Entry Required
	×	1	IP Address	Description: Setal Number
	₩.	P	MAC Address	
	10	10	Asset Tracking 5	Delete Sava Close
	Г		Asset Trecking 6	
	10	Г	Asset Tracking 7	
	10	- E	Asset Tracking 8	
	Г	17	Asset Tracking 9	
	10	臣	Asset Tracking 10	
	Г	17	hout T	
	Ē	Г	hput 2	
	17		Input 3	
	Г	1	input 4	
	D	10	Input 5	
	Г	r	Output 1	
	Ē	1	Output 2	
	17	1	Output 3	
	Г	r	Output 4	
	E	E	Output 5	

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.

		Intity 1.0 🛨	ADD
Model: Cl	1000		
P Ass	et Tracking 🧮 Favorite Last Update	e: 7/15/2011	- 17181-
Mg Number:	CT1000	Select Image	
Mg Name:	Creatron	Clear Image	C Bridgers
Description:	Color Wall Touchpanel		
Features	Eegen odor touch screen controller for your home	#V system	
	Labor Asset		
Data Reg			Reset
Serial N			
IF Serial N IF Asset T	ag		Al
I Serial N I Asset T I IP Addr	ag 558		
IF Serial N IF Asset T	ag 558		
I Serial N I Asset T I IP Addr	ag ses kirnas		
♥ Serial N ♥ Asset T ■ IP Adda ■ MAC Ad	ag oss kahrenaa gene to (* Thaitem only		
♥ Serial N ♥ Asset T ■ IP Adda ■ MAC Ad	ag oss kimiss ges to	n Mester Product	

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.

In Use	D/E Req	Description	Define Labels	
V		Serial Number		V In Use
V		Asset Tag		Data Entry Required
V		IP Address	Description:	Serial Number
J	1	MAC Address		
100	100	Asset Tracking 5	Delete	Save
		Asset Tracking 6	0	
[[[[]]]]		Asset Tracking 7		
la.i	177	Asset Tracking 8		
100	100	Asset Tracking 9		
1000		Asset Tracking 10		
		Input 1		
(the state	177	Input 2		
100	100	Input 3		
1000		Input 4		
[177]		Input 5		
1971	177	Output 1		
100	100	Output 2		
100		Output 3		
		Output 4		
1771	177	Output 5 +		

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

Induct Info	ant line of	linunge		Vee Reor Plan	100	Bevalion
CT100E		1000		00		
Supplier.	Mg Number: Restaurces		1		100	
• notice	CT1000	- Martine				
Category:	Hig Name					
• keeds	Creatron	Hoight:	Width:	Depth:	Weight	
	UPC	6.5	.51	3	1	
		AutoLink Packa	ge Buider			
Association (notared):	1	AutoLink	Package		See	Product before witting Link
olor Wall Tiruchpanel				Hos	ini.	3
eabures			1000 C		a constant	
legent color touch screen controller for your home AV system.		Guardity:	1.00	- AN	Dalara	More & More 1
		QTY	UNT	MODEL	MEG NAME	DESCRIPTION
		25 Power	1.00		line-lines-	- Itale constants
		100 0		CATSe	Enklas	Calegory Se.
Equipment Labor User Inventory Asset	GuickBooks		nu n	Contract (California	canadra how
D/E Req						
Social Number Asset Tag P Address MAC Address MAC Address	-					
C Asset Tag P Address MAC Address	Spatient Control *					
E Asset Tag						

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.

Participa framerica Mar	Alter Tation - #\$220											
file View Ends Pres	t Settings Terroria	toi import/Eq	port Quickfo	oks. Online Produ	att Project Willer T	Afortale, Reputer	User Outrie Help					
🔓 Ciera 🥌	Acors (1) But S	ettings 🛗	kolt Forteer	Refeate								
tal Cometa Dari			10 - 10 - 10 - 10 - 10 - 10 - 10 - 10 -		Project Manager	Presid Calendar	Project Taracina					
Danie Pusture Orders/	Track Inventory and In	-										
Parent Two	- Peerton -	Class :	Job #003	Test Set 0307	2013e							
Value Hoose -Al Filone			- C -	dasta bos	+ (a	den beren						
NCESI.	400M	- 274	465.0	1.847	10-1 MME	SHRUEL	14309709	interested.	ani-tran	unit-tak	e arreste	
(Pawer Seath	1		0.000	122			and the second se		Alter and a		Compare a	
CT 1000	Reditation 1		00 CT1000		eal Creation	Creative	Code: Well-Tourspeciel	1.0.0				
E-0710481	Construction of the	1 24	100 CT1040		and Street and	Contractor	Take Web Townspeciel	Summer of	1040470		100-04 121	
CT1000	Eedtoom 1		00 CT1000		- ea Creaton	Centur	Color Well Tourtgeod		The rest of the local division of the local		A DESCRIPTION OF THE OWNER OF THE	
CF 1000	Dediction 1	1 1	00 CT1683		may Creektoon	Ciedos	State Wat Town					
CT 1000	Biodiscopes 1		00 CT1981		an Crashon	Crestron	The Party of the P	1.1.1				
CT 1000	Bedicpen 3	. 1	00 011000		as Creation	Clashics	CLER Well Touchpenel					
67 1000	Beat costs 1		100 CT1080-		and Constant	and the second second	Come Milet Transforment					
CT1000	Dearster 8		1.00 CT108 3	and in sec.								
CT 1000	Endropen 1		00 CTHDB	Gaarant Assess				100				
GT 1000	Detroier 1		00 CT100	US		10762	Aller A Land					
CT 1000	Dedrocen 1		00 CT108			Contraction of the local division of the loc	The second se	(
C21000	(Bellines)		00 CTIME	_				1.000				
CATER	Technony 1	1.29	100 04154		ALC: NAME OF		The second se					

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 look up 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.

	Clear Selec	t from QuickB	ooks / Outlook contacts	-	
Client Name:	Douglas Residence				
Address:	37 Wildcat Ranch Dr.				
City:	Snowmass	State:	СО		
Country:		Zip:	81615		
Phone:	(970) 925-1111	Fax:	(970) 925-1126		
Mobile:]			
Contact Person:					
Email:	douglas@wildcatranch				
Notes:				-	
	ļ				
Ship to - Job site		al Contacts:	Chie Te	1	
	Ship To			-	
	Jorip To				
				-	
Company Name:					
Company Name: Address:					
Company Name: Address: City:		State:			
Company Name: Address: City: Country:		Zip:			
Company Name: Address: City: Country: Phone:					
Company Name: Address: City: Country:		Zip:			
Company Name: Address: City: Country: Phone:		Zip:			
Company Name: Address: City: Country: Phone: Contact Person:		Zip:			

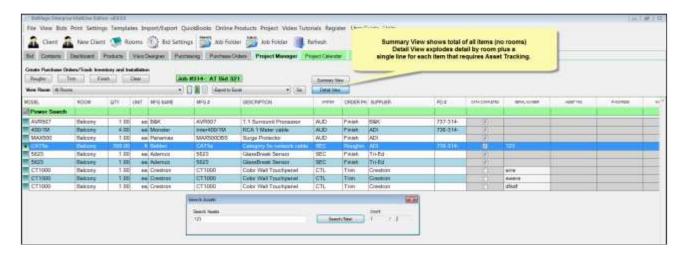
c Delast	and the factor of the second
	Carpus
	Canpus: Parkway Schools
	Narie Parkway School Detrict
	Descriptor:
	Edt Room
	Defets Save Close
And the second s	
Parkway Schools / Room	n;
All Rooms	1
	wish to View or Edit
Al Room Select the Room you 201	wish to View or Edit
Al Rooms	wish to View or Edit
All Postmi Select the Rosen you (201 201 300 400 900	wish to View or Edit
All Rodmi Select the Room you (201 300 400 400 400 90° New Caseroon 201 New Caseroon 2	wish to View or Edit
At Posms Select the Posm you 201 300 400 gym Nex Carepson	wish to View or Edit

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.



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.

Bid Chart Dashbos	et Poducts Ve	Search Assets									
	ate Product)	Search Assets					court		Asset M	Agmt.	Viev
MODEL.	/ ISER3	555				Search/Next	1	1 1			
2 16/4							100				86/
400/1M					and the second		and the		0		06/1
45132								13	23	10	08/1
5823	1				1073		100	10	13	11	06/
AVR507				10	100		1.0		13	13	08/3
AXS							1.5	10	10	1.	08/2
BKT700								- 13 -	10	13	08/2
Cabling				and the second				0	8	0	08/7
CAT5e								13	10	0	06/3
CSNR			1	ALC: NO.		100		100	23		06/1
CT1000				1.10				10	10	1	06/1
DAR112							E Dest	137	10		06/1
DAW742					STATE OF STREET, STATE			10	823	10	06/1
EM36							100	17	13	101	06/1
HRMP				States of Concession, Name	100	1 C 1	10.00	13	10	0	06/1

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.

Job Number	300 Mam			Start Date	67/01/2010			
Userum	(adı	<u>.</u>	0.00	End Date	01/12/2011	•		
Apply Filter	Reput	Esport to S	sat.) [Jose	12 necord(a) filliored.		
DATE		JOBISTATUS	JOB NAME	PRODUCT MODEL	ACTION	QTY	USERNAME	
01/12/2011	1-12-56 FM	2	SOO MIANI	a		00	Lich	
01/12/2011	1.12:57 PM	1.	300 Miami	G	insertion of	0.0	, rich	-
01/12/2011	1 12:57 PM	G	300 Miemi	TR800	IsOrdered	2.0	rich.	
81/12/2011	1 12:57 PM	4	300 Miami	G		0.0	rich	
10/08/2010	0 02:30 PM	p	300 Miami			0.0	rich	
09/01/2010	0 10 35 AM	E	300 Miama	CT1000	IsShipped	1.0) rich	
09/01/2010	0.10:33 AM	E	300 Miemi	CT1000	IsShipped	5.0	eich .	
06/01/2010	MA 00.01 0	E	300 Miemi	lentel	IsShipped	10	rich	
09/01/2010	0 10 05 AM	E	300 Miemi	Intel	isReceived	1.0	rich	
09/01/2010	0 10 05 AM	E	300 Mierrs	intel	IsOrdered	10	rich.	
08/01/2010	0 10:05 AM	E	300 Miemi	HIS	IsReceived	1.0	nch.	
I DOWN DON	MA 60 01 0	E	500 Miami	HTS	IsReceived	10	rich	

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 the same version of BidMagic on the new PC. Support can supply you with a link to different versions.

If possible, install the same version of BidMagic as you were using previously, by using original disc, running automatic updates or by contacting BidMagic .

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.

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.

🔗 Region and Language 🧮	
Formats Location Keyboards and Languages Administrative	
Format:	
English (United States)	
English (Canada)	
English (Caribbean)	
English (India)	
English (Ireland)	
English (Jamaica)	
English (Malaysia)	
English (New Zealand)	
English (Republic of the Philippines)	
English (Singapore)	
English (South Africa)	
English (Trinidad and Tobago)	
English (United Kingdom)	
English (United States)	
English (Zimbabwe)	
Estonian (Estonia)	
Faroese (Faroe Islands)	

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 Tab

Opens the Calendar View.

Timeline Tab

Opens the Timeline View. Tabs include Gantt Charts, Graphs of Task Completion and graphs of hours assigned vs. actual hours used. The Progress Monitor graph is found here which looks at the big picture of each labor phase of a project and graphs the hours sold vs task hours completed vs the man hours used to complete the tasks.

Work Orders Tab

The Work Order page show all individual work orders that have been scheduled. You can view all hours scheduled and completed per work order. Use the power search filters to display results for a particular client, job, tech, etc. This provides helpful totals at the bottom. You can output the results to Excel. Right click on a work order to open it and edit it.

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.

Project 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. Choose to automatically clock techs out at midnight to avoid multi-day results if they forget.

Project Calendar Settings BidMagic Clou	- □ ×	
Unassigned Tasks		
Start Date Filter:	14 Days Ago \sim	
End Date Filter:	All Time \sim	
Reschedule Tasks Daily:	5:00:00 PM 🚖	
Clock Techs out at midnight:	Daylight Saving Time	
CRM: Pacific Standard Time	,	
Local PC Time Zone: Pacif	fic Standard Time	
Upd	ate	
ОК	Cancel	

Portal Settings

Here is where your connection to the Portal is configured. The URL is automatically set for your company. Open this window, then click Update and Save.

BidMagic Clo	•
Blan	Magic Cloud
URL:	http://demo.bidmagic.biz/ Update Save Cancel

Mobile Users

This form manages the mobile techs who appear on the Calendar to connect to mobile devices. Just create a name for new users and mark them as active. Add or change user names as needed up to the number of active tech calendar subscriptions you have. Administrators can reset the password to the current password in Default Settings. (default is BidMagic – case sensitive).

Mobile devices require a cellular data or wifi connection to the app. Contact BidMagic if you need to add additional mobile users. **Note:** BidMagic admin users can adjust these settings.

User Name	Is Manager	Is Active	Mobile No.	^
Jason Witte			8433002831	
Julia Corrodi			8433779886	
Keith				
Kurt Melo			5702289972	
Lee Judy			8433773562	
Mathew				
Nate				
rich			3106149064	
Troy				
				v

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.

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.

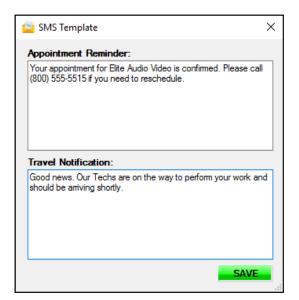
Timesheet

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 Messages

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.)

From Elite AV Systems: Your appointment for service/installation is coming soon. Please call <u>800-598-5860</u> if you need to reschedule. Your appointment is: August 15, 2016 02:00 PM



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.

Details Work Order No. WO-465-MN-0046 Subject Audio Video Installation: Prewire [demo - 7 Start Date & Time 7/29/2016 T12:00:00 PM End Date & Time 7/29/2016 V 4:30:00 PM Description of Work]	Project Audio Video Project Ta Audio Video Assigned	rk Order P Installation Installation: Pre	Billable Flagged rint Work Order
Work Order No. WO-465-MN-0046 Subject Audio Video Installation: Prewire [demo - 7 Start Date & Time 7/29/2016 12:00:00 PM End Date & Time 7/29/2016 4:30:00 PM End Date & Time	7/29]	Project Audio Video Project Ta Audio Video Assigned) Installation isk) Installation: Pre	~
Subject Audio Video Installation: Prewire [demo - 7 Start Date & Time 7/29/2016 ▼ 12:00:00 PM ↓ End Date & Time ↓ 7/29/2016 ▼ 4:30:00 PM ↓	7/29]	Project Audio Video Project Ta Audio Video Assigned) Installation isk) Installation: Pre	~
Audio Video Installation: Prewire [demo - 7 Start Date & Time 7/29/2016 ▼ I2:00:00 PM € End Date & Time 7/29/2016 ▼ 4:30:00 PM €]	Audio Video Project Ta Audio Video Assigned	isk) Installation: Pre	wire $ imes$
Start Date & Time 7/29/2016 ▼ 12:00:00 PM ↓ End Date & Time ↓ 7/29/2016 ▼ 4:30:00 PM ↓]	Project Ta Audio Video Assigned	isk) Installation: Pre	wire V
7/29/2016 □▼ 12:00:00 PM ↓ End Date & Time 7/29/2016 □▼ 4:30:00 PM ↓]	Audio Video Assigned	Installation: Pre	wire \vee
End Date & Time 7/29/2016 ▼ 4:30:00 PM ◆]	Assigned		ewire \vee
7/29/2016 ■▼ 4:30:00 PM 🖨]		Hrs. Co	
]			mpleted Hrs.
		4.	50	0.03
	efaults Check or Service Ca			
Client Name				
Thaxton, Denny	 ✓ Client Info 	Job Settings	Send Tex	
			(Must be	Cell Phone)
Address				
Address 2910 W. Bay to Bay			Jobsite Ph	
2910 W. Bay to Bay	State Zip]	Jobsite Ph (012) 345-61	

Signature Terms

Input the terms you want to appear on the signature capture in mobile devices.

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.

D	efault Settings										
	Note: These set	ttings app	oly to all use	ers and to	all new Bids. 1	Fo view or ea	dit settings f	or individual B	ids, open the	Bid and click on Bid Setting	gs.
	Default Settings	Status	Systems	Rental	International	Enterprise	Updates	Job Phases	Pay Period	Automailer	
	Select a pay		low ay till last da	ay of the r	nonth)				7		
	⊖ Week	ly (Monda	ay till Sunda	ay)							
	Twice	a Month	(specify cu	it off date	s below)						
	1st C	utoff: 1	15 ~	2nd Ci	utoff: 31	~					

SENDING JOBS OR SERVICE TICKETS TO THE CALENDAR

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. Service Tickets do not need to be marked sold. Open the Bid (Job) and click on the Project 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.

Note: Bids have to be sent to Project C		, JODS IIISL DEI	ore mey can be	
Client Name:				
Thomas & Jennifer Dou	glas			~
Job Name:				
dupetest				~
Project and Related Ta				
Project	Due Date:	06/02/2016	\sim	
Allo	tted Hours	Due	Date	
Programming:	2.00	06/02/2016	\sim	
Prewire:	13.50	06/02/2016	\sim	
Trim:	4.00	06/02/2016	\sim	
Finish:	17.95	06/02/2016	\sim	
Service:	3.00	06/02/2016	\sim	
Warranty	4.00	06/02/2016	\sim	
Install:	0.00	06/02/2016	\sim	
	Install + Ad	justment:	\$5,200.00	
	Ins	tall Rate:	\$0.00	

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.

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 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. You can click on the column separators to store the column width you desire for the Day view or Work week view.

Find User

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

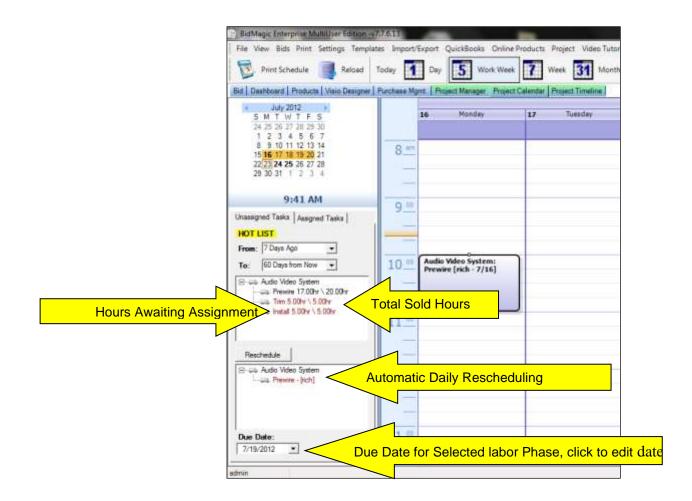
BidMagic Enterprise MultiUser Edition	-v7.7.6.13		and some CONCERNED	and the second se
File View Bids Print Settings Temp	1	10		
Print Schedule 📑 Reload	Today 1 Da	y 5 Work We	ek 🚺 Week 🚮 Month	Find User r
Bid Dashboard Products Visio Designe	r Purchase Mgmt.	Project Manager Proje	ct Calendar Project Timeline	
+ July 2012 >	1	1999 - 1995 ¹¹	1012 2 1	rict
S M T W T F S 24 25 26 27 28 29 30 1 2 3 4 5 6 7	16	Monday	17 Tuesday	18 Wedne
8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 1 2 3 4	8_***			
9:55 AM	9 00			
Unassigned Tasks Assigned Tasks				
From: 7 Days Ago				
To: 60 Days from Now -		io Video System: wire [rich - 7/16]		
Audio Video System	_			
Trim 5.00hr \ 5.00hr			Return to unassigned tablist	
	11_00		Copy Work Order	
1				
Reschedule				
🗈 🖙 Audio Video System	12 pm			
Due Date:	1_00			
7/19/2012 •			1	

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 Assign 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.



Type G Work Order C Sension C	ar i	Heenou		Completed
Detals				. cottor
Tracking No. TASK 02615				Install Copy Report
Subject			Project	Initial Copy neport
new bid990 Finah (Flich_Laptop-4/26)			menr badteti	-
Start Date & Time			Project Task	
4/26/2011 💌 11:00:00 AM 🛨			new bid990. Finish	
End Date & Time			Assigned Hrs.	Completed Hrs.
4/26/2011 💌 1.30:00 PM 🚖			2.50	0.00
「Aeston: [04/26/2011 Notes	Send Ne	n ridan.	View Work Order	Print Work Order
Accuurt Name		100000		1
Douglas Residence	•	Gent info	Job Settings	and the second se
Douglas Residence Address	×	Gent Info	Job Settings	
Douglas Residence	.▼ State	Cient info	Job Settings	The second secon

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.

		Order								
Al Clea		Send to V	fork Ord	ior	Hours to	Assign	8			
ROCM	иштен	QTY	UNIT	MFG NAME	SUPPLIER	MODEL.	DESCRIPTION	Enge	лаценя	пан замт
Home Theatre	VID	1	66	Runca	Ranco	HTS	DLP Video Projector	۲	E 00	12
Home Theatre	VID	1	00	Panamax	Capitol	MAX500	Surge Protector	0	0.25	a T
Home Theatre	AUD	1	60	B&K	B&K	AVR507	7.1 Surround Processor	0	2.50	10
Home Theatre	ALIC	1	68	Middle Atlantic	Capitol	AXS	Equipment Rack System		2.00	
Home Theatre	CON	1	ea	Crestron	Crestron	CT1000	Color Wall Touchpanel		4.00	11
Home Theatre	CON	.1	68	Niles	Capitol	Intel	Intellicontrol System		4.00	
Master Bedroom	VID	1	ea	Panasonic	Electrograph	TH-42P	42" Plasma HDTV		3.00	E
Marter Redeam	AUD.	1.4	111	Decemen	Canital	MAYEOD	Curran Dratactor	ā	0.25	

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.

All Clear			Work Order Ho	ours will suggest 8 ma	X Hours to Assign	8.00	Send to Work	Order
ROOM	aty	UNIT	MFG NAME	MODEL	DESCRIPTION	PRENTE	PREARENT	59.0
Power Search					e			
Audio System	2	- pr	Speakercraft	TR200	Ceiling Speakers		2.00	12
Audia System	1	-	Nilus	Initial	Intellicentral System		0.50	U
Conference Room			Rutto	HTS	DLP Video Projector		2 00	
Conterence Room	1 4	pr	Speakercraft	TR700	Ceiling Speakers		4.00	2
Conference Room	1	en	Nies	Intel	Intellicontrol System	- Te	0.50	
Control Room			Inhouse	TVG	TV outlet white		2.00	12
Control Room	2	0	Audio Access	KPS101	Music System Keyped		2.00	13

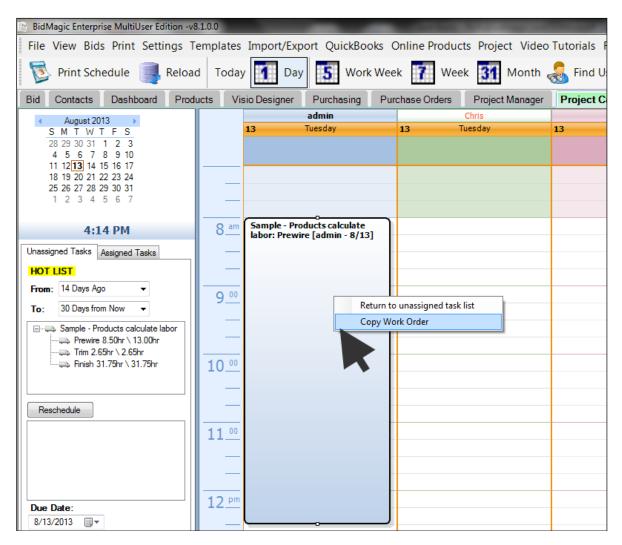
For multi-day tasks, click on the Calendar event and drag a copy a of this work order to additional days or techs and copy the work order. This creates new work orders and depletes the hours from remaining task hours. You can assign many hours to a work order. Repeat the process until all hours have 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.

USING COPY/PASTE FOR MULTIDAY OR MULTIUSER ASSIGNMENTS

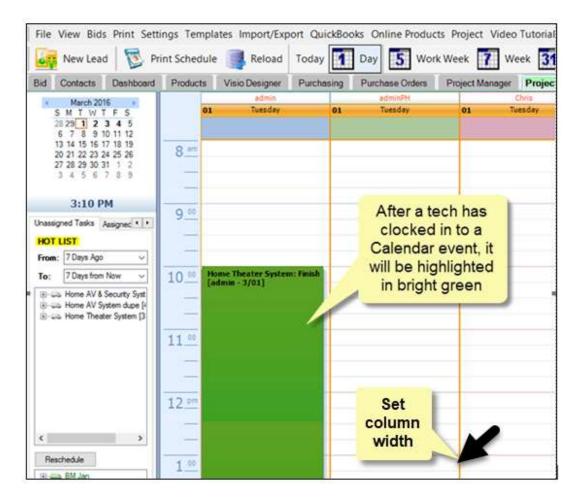
Every time you send a Work Order to the Calendar, BidMagic stores that in the clipboard. To duplicate that same Work Order for another day or user, simply right click on the Calendar and select Copy.



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.



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.

🖶 Quick Task QT-03	0116-1	_		×
Task Name:	Quick Task		🗹 Billab	le
Task ID:	QT-030116-1			
Client:	Thomas Newman	~		
Details	Client Addresses: Client Address	~		
Address Name:	Client Address			
Company Name:	Thomas Newman			
Address:	4230 Vista Way			
City:	Malibu State: CA			
Country:	Zip: 90265			
Phone:	(310) 555-1212 Fax: ()			
Contact Person:	Bill Norman			
Email:	rich@bidmagic.com			
Start Date & Time 3/ 1/2016				
	Sa	ve	Cancel	

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.

Print Schedule		rint V	Work Ord	ers for	Day or Wee	k Vie	W
July 2011	and setting	\sim	College Transferen	CONSTRUCTION OF	Rich	Laptop	(1995)
SMTWTFS		11	Monday	12	Tuesday	13	Wednesd
26 27 28 29 30 1 2						The second	
3 4 5 6 7 8 9 10 11 12 13 14 15 16		11		_			
17 18 19 20 21 22 23							
24 25 26 27 28 29 30 31 1 2 3 4 5 4	9 ==						
MIT STORED	-						
4:52 PM							
Unassigned Tasks Assgres	10.00						
HOT LIST	10_						
30 Days 🔹	-						
HE was AV & Security System Pro:							
32-334 Benedict Carlyon Home				-2000	ict Canyon Home: Trim	120000	t Canyon
H-un New Service Call	1100						

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.)

	Dr. Morris (636) 456- Ind Comme	ake PC		WORKORDEF	54-3210 ht up hill 1 mile on	Green Hi Assigr	107 ighlig	asks	
0:00 AM - :30 PM obsite Info a irections to ROOM onference	Dr. Morris (636) 456- and Comme Jobsite: T	ake PC	ee Caretaker Mr CH 1 N to Mornin	WO-0057-0067 s. Ferguson. 310-6 g View Dr. Turn rigt	ht up hill 1 mile on	Chesterfield, MO 63	ighlig	asks	
30 PM obsite Info a irections to ROOM onference	(636) 456- and Comme Jobsite: T	ake PC	ee Caretaker Mr CH 1 N to Mornin	WO-0057-0067 s. Ferguson. 310-6 g View Dr. Turn rigt	ht up hill 1 mile on	Chesterfield, MO 63	ighlig	asks	
irections to ROOM	Jobsite: T	ake PC	ee Caretaker Mr CH 1 N to Mornin	s. Ferguson. 310-6! g View Dr. Turn rigt	ht up hill 1 mile on	left Green Hi Assigr	ighlig	asks	
ROOM	Jobsite: T	ake PC	CH 1 N to Mornin	g View Dr. Turn rigt	ht up hill 1 mile on	Green Hi Assigr		asks	
ROOM	QTY	UNITS				Green Hi Assigr		asks	
onference			MFG NAME	MODEL	0.00				-
	2				DES	SCRIPTION	STA	HOURS	DON
ount		ea	Dakota	DAW742	Black & White Exten	mal Camera		1.4	
	INSTALL N	OTES:			_				
onference oom	200	t	Belden	CAT5e	Category 5e networ	k cable		2	
	INSTALL N	OTES:							
onference oom	1	ea	Runco	HTS	DLP Video Projector			2	
onference	1	ea	Stewart	Luxus165	165" Diagonal Scr			2	
	INSTALL N	OTES:				Additional Tas	SKS		
onference pom	2	pr	Speakercraft	TR700	Ceiling Speakers			2	
	INSTALL N	OTES:	1	1	-				
onference oom	1	t	Signature	16/4	Speaker cable 4 cor	nductor		0.01	
to stale mart	INSTALL N	OTES:			-				
	om nference om nference om	INSTALL N Inference 1 INSTALL N INSTALL N INSTALL N INSTALL N INSTALL N INSTALL N INSTALL N INSTALL N	INSTALL NOTES: Inference 1 ea INSTALL NOTES: inference 2 INSTALL NOTES: inference 2 INSTALL NOTES: inference 1 t INSTALL NOTES: inference 1 t INSTALL NOTES: inference 1 t INSTALL NOTES: inference 1 t	INSTALL NOTES: INSTALL NOTES: Inference 1 ea Stewart INSTALL NOTES: Inference 2 pr Speakercraft INSTALL NOTES: Install NOTES: Inference 1 INSTALL NOTES: Inference 1 R Signature INSTALL NOTES:	INSTALL NOTES: HTS INSTALL NOTES: Install NOTES: Inference 1 ea Stewart Luxus165 INSTALL NOTES: Install NOTES: Install NOTES: Install NOTES: Install NOTES: Install NOTES: Install NOTES: Install NOTES: Inference 1 t Signature 16/4 Install NOTES: Install NOTES: Install NOTES: Install NOTES:	Image: Second	Image: Second	Install Notes: No Highlights show Additional Tasks Install Notes: Install Notes: Install Notes: Install Notes:	Install Notes: Notes: Inference 1 ea Stewart Luxus165 Install Notes: Install Notes:

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.

AUTOMATIC CLOCKOUT

This option automatically clocks techs out at midnight. This is helpful if a tech forgets to clock out at the end of the day and the end of day cutoff avoids confusion that would be created by multi-day clockins.

TIMELINE (SCHEDULE OVERVIEW)

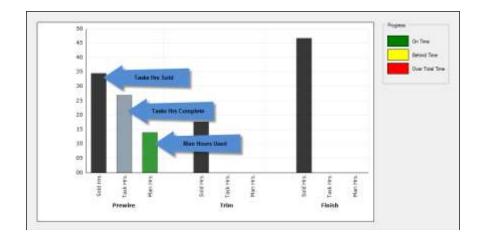
This Gantt Timeline View makes it easy to view the big picture of your project scheduling. The bars here indicate the scheduled task duration. Hover over a bar to view how the project is scheduled. Select the Start and End Dates to display a time frame. Select the Project Task or All Projects that you 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.

i inte	lings for Mahdden is	Han - d.R.J.275	un licitate la di	and to regree to \mathcal{D}	hori).												- 6	F K
Pile 1	Ware Babs Print	Settings Ter	replates bro	port/Esport Qu	ickBoicle	Cinkins Prok	dath Projec	t Vide	to Tatoriale Regi	Ave Sheet	ware Help							
-9	None Load	Dert 🕥	Bid Setting	p 🐨 Reems	Sal Pa	nave 🗿	Job Folds	1	Autom									
Dd.	Connecto Danks	and Pasts	tel Mater	Fundame Order	. Page	Manager	Determine	Tires	Wark Cicken									
	siect -	IMPA	in al	-1-	Star Action	1000	Property Maniles											
	Date: 12/ 1/2017			01003 0-	Add the set		ala : Door											
	Address of the second sec	911 1	and these of the	service He.		2004	100110-00400											
Road 1	and the second sec																	
and the				Deet Name		Test	Nete		544		3m2m	3474	0	intim.	Teach	Test range	Territor	1.72
2791	wer Sepret																	
11	tuik hat		-	rade file tare		i anti			Chinghile	- 0	ACCENTION INV	III IEVIIIBOUT	IT TEAM	1/2/28		1.0	1.0	
10 TQ	STUDIES LAS			with this one			10 C		Congletes	1	060013 08:35 PM	LANGERT/	II HAM	10/07/201	3 100	1.00		1/100
120	A first remains			nedo this new (pPrep:	10	Not Sharty		29/20170110/94	18292043	89.00 PM	12/01/201	d			
	that menu			rade the new		- Anto			Carquinter		14/0617.10:00 /**			1207080				
	Text 2			Sal Solutione		2 Biele			Not Sharts		36/2317/36/08/PM			12(03)281				
	www.bell (Jan Spinisters		line in			Not Share be		06/2017-09-05 FM			1001001				
	& Security System			Ronas Prestnery		field			In Property		28/2017-04 00 PM			FI(25,081				
Tei I	1501			Authen, Lany		Salt	-5.0		No Starte		22/26/01/26 56/24	12/22/2017	SA 30 PBK	LUCION	the cub	2.00	0.00	
100	Twittiane	Denter	Set .	Print	Pielec H	A Des Des	ti De 17 De	24.24	at last lasts :	n 21, Jan 3	PALL PARTS PA	the Freide Have	Her 11, 64	e th. Her JL. Jay 1." Jan 1	1 Jan 15 J	w M	Hart May 1	a Millio
10	trained.	7.04	1	Tanana 1	1.23	0		_										
1	TARK.	1.04	Concernent I	Transferring -		-												
3	Sig free	254	D			0												
3	Install	114	December 10			-0 =												
-	iteld!	2794	Departular I	Countries -	-	4121												
-	Facel	2.04	The second second	Carry State 1	-	- PLATE				6								
-	- and -				_													

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.

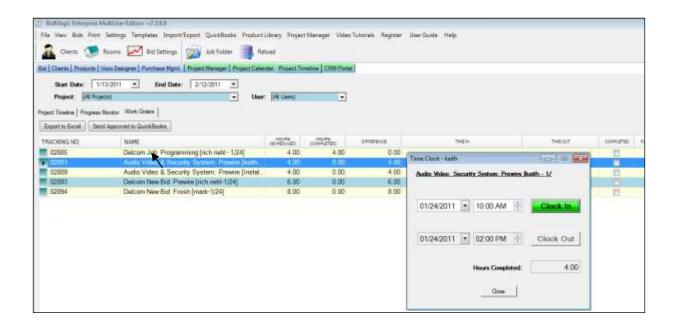
WORK ORDER SCREEN TRACKS INDIVIDUAL WORK BY JOB AND TECH

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.

New Level 🔒 C	ient 🔞 Bid Settings 🥌 B	ooms 💷 Preview 🐲	Job Folder	📕 Refrecti 🍟 Oear Filters								
ful Contacts Destatos	the second s	Orders Propert Manager										
Propert United State Dates United States Dates United States Regions Notice Expert in Stool United States	Rot Date: \$14200 B	Columns Colum	Uners) Test	Feinaes			Hou	10.0	Tax tur	Adaptionents/Terms	Page 1	Camples
tho	er sudio room tracy pice 209 b	WD:399-WW 7593	163		8.00.	8.00	10.75		5 0 00			
	the steppo tober mark fields 700.8		803	Here are my noted from the pib arts.	1.90	1.00	1.03		7.0.00		0	0
Thomas Johnston Thomas Johnston TOTAL	av suffic room tracy pros. 309-0	an and an and a second										

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. Please note the important difference between Task hours scheduled and completed vs Man hours clocked to complete them. In the top work order the tech completed all tasks scheduled for 8 hours. However, his actual time to complete these tasks was 10.73 hours. This is a great way to track results. Paper clips in the Attachments column let you open signature and photo capture images. This screen can be exported to Excel (with active filter results) for printing or distribution to others.



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.

🥻 Cierta 🚿	2011/2	S			A	Rebail	Project Manager - Video Tutoriale - Bagieler	UNF UPDE	146							
And						Nor ProstCale	nter [Prunt Tenton CRItfyind]									
Greate Purchase Orders/Track Inventory and Installation					PO #	Job i	1308 -: Parloway North High School									
Freves		Fruit	16	Dear	105											
Room: Al Room		-			•	Revision	Send POIts GBloka	• Ga								
ROOM	1970-	gtir	98	MEG NAME	SUPPLIER.	HODE.	DESCRIPTION	08089.101	0.009	101210	HINE	ang-mg	-164	Hear.	19794	1004525
Cassroom 102	Asc	1.0		GE	Tritti	11000514	Concard 4 Security Panel	1.1				2	0			0
Classroom 102	ACC	2.0	- 11	GE	Tri-En	1706001020	Concord 4 Digital Keyped	10	- 13	1		99999	16			
Classroom 102	ACC	6.0		GE	Cepitol	46132	Motion Sensor, Wireless		- 21		13	2				
Clessroom 102	SUR	2.0	- 10	Dakote	THED	DAR112	Alart Hidden Black & White Comore		1		0	-	1			
Classroom 102	SUR	2.0	88	Dekota	Triffid	DAW742	Black & White Esternal Camera		- 23 -	11	1	2	8			
Classicom 102	SUR	1.0	. 99	Dekote	TeiEd	DAR112	Alert Holden Black & White Carriers	10	23	21	10	2				
Classicom 102	CTL	200.0	t	Seide=	Cepitol	CAT5e	Calegory 5e network cable		0		5	888				2 6 1
										21						

TRACKING COMPLETED HOURS IN PROFIT REPORTS

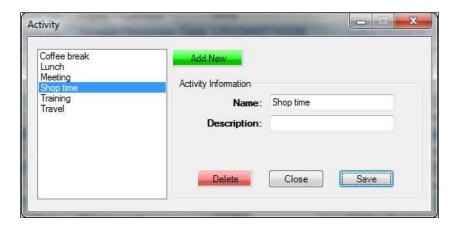
Connected techs can Clock In and Out of the Jobs, their reported hours are also sent to the Profit Report. This report utilizes this current information as to the hours logged to update the actual labor calculations and compare them to the labor cost and sell prices. Calendar users can compare hours 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. You can adjust existing clocked times directly from timesheets. 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 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. To add new clocked times, open the work order from the Work Order tab or from the Calendar.

Select employee Upername:	nama and pay period lens	w.	< Pag Period	1 Tot	of Hours:	39.05				
Send 1	e QuickBooke		From: 07/01/2017							
Export to Excel Onne			Te: 0015/2017	fron	r Total n first		WO= Work Order TO= Travel for Work Order			
DATE	04Y	044.5701	AL TIME N	110 - 12 - 2	kin to lockout	1/2017 to 7/15/20 HOUR	QT= C	uickTask	A REAL PROPERTY AND A REAL	
07/02/2017	Sunday	00.00		/				Mobile QuickT	ask	
87/03/2017	Monday	00.00	/				ACT=	Daily Activity		
07/04/2017	Tuesday	00:00				/		11		
07/05/2017	Wednesday	00 00	1							
87/06/2017	Thursday	01:00	MA, GO 60	MA 00 80	Work- Mad		1.00	i and the second se		
07/07/2017	Friday	11:15	10.14 AM	11:14 AM	QTM-0707	17-1	1.00	Kelvin Rocks	Servicki	
			11:14 AM	05;44 FM	QTM-0707	17-1	6.50	Kelvin Rocks	Servicio	
			05:00 PM	06:00 PM	Lunch		1.00			
			08:00 PM	09:29 PM	QTM-0787	17-1	1:38	Kelvin Rocks	Servicio	
07/08/2017	Saturday	02-00	08.14 AM	07 14 AM	GTM-0707	17-1	1.00	Kelvin Rocks	Servicia	
and the second			07.14 AM	08 14 AM	QTM-0787	17-1	25-00	Kelvin Rocks	Servicio.	
07/06/2017	Sunday	.02.00	D8:14 AM	09.14 AM	QTM-0787	17-1	1.00	Kelvin Rocks	Servicio	
			09.14 AM	10:14 AM	QTM-0787	17-1	1.00	Kalvin Rocks	Servicio.	
07/10/2017	Monday	00:00								
07/11/2017	Tuesday	00.00								
07/12/2017	Wedneedey	00:00								
07/13/2017	Thursday	90,09	02-38 AM	02.39 AM	ACT-0713	7-1	0.02	Gulf Coast Sound	Lunch	
			02:38 AM	02:47 AM	ACT-0713	7-2	0:15	Gulf Coest Sound	Lunch	
07/14/2017	Friday	00.00								
07/15/2017	Saturday	00:00								
						Te	nai = 39.05	E.		

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



CONNECTING MOBILE TECHS TO THE CALENDAR:

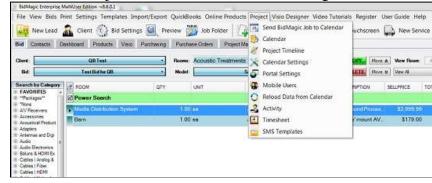


IPHONE & ANDROID APPS:

Pro/Enterprise users have 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

Inside BidMagic Click on the Project Menu and select Portal Settings.



To Establish your connection, verify that the URL name is show. Then click Update, save.

BidMagic Clo	ud Settings
Bidl	Magic Cloud
URL:	http://CTP.bidmagic.biz/

Next, Click on Project Menu/Mobile Users. Add the names of techs and check. Check the Box "is Active" to make the mobile user active on the Calendar and provide the Mobile User Login to connect to their smartphone. Mobile users can download BidMagic Tech Calendar from the Apple store or Google Play store. The screenshot below is a sample. The initial password for mobile users is BidMagic (capital B and M).

Mobile User URL Log I	In: 📥 ht	tp://usertec	h.bidmagic.biz/	March Margare W
User Name:		ADD		LOG IN
User Name	Is Manager	Is Active	Mobile No.	BIDMAGIC
Alvin				entegrane tritter Basteren Westfilmer
Chris				Tech Calendar
Christy				(1) Username
Rich				B BidMagic
Rich2				
Spike				http://usertech.bidmagic.biz/
				LOG 14
				Ration by Ma
RESET PASSWORD			Close	
'ou can activate up to	10 mobile users. Cont	act		

Open the Calendar tab to verify that your techs are now shown there. Be sure to watch the Calendar video tutorial to get started. Your techs should also view the video How to user BidMagic on their phones. Swipe to the right to open the menu.

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.



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

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.



Sending an Image from Mobile User to BidMagic Work Order Page

Click on the camera icon to upload a new or stored photo to BidMagic. Click the pen to record a client signature. The Images and Signature captures sent from mobile devices will appear as attachments on the BidMagic Calendar Work Order page. Click on a thumbnail to open the image. The terms tab stores any uploaded signatures with the Work Order info and signature terms.



Start and Stop Button

The start and stop buttons 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 or activity. 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 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.



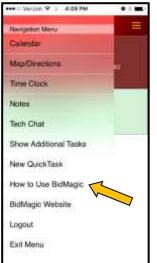
New Mobile QuickTask

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

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.



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.

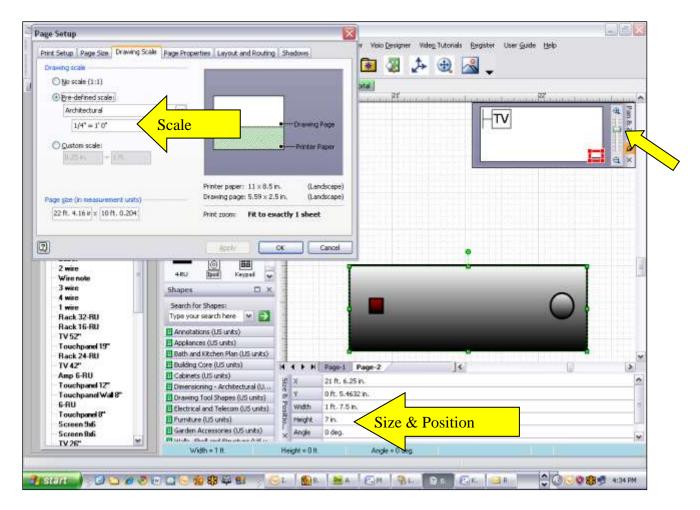


Visio Tools Menu and Icons:

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:

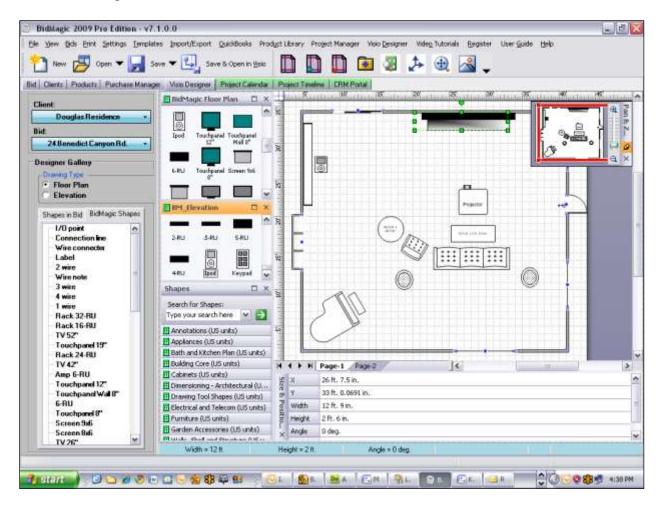
If you want BidMagic to automatically assemble your drawings, use Page Settings of 8.5" by 11" – portrait or landscape. (Larger page sizes will cause automatic scaling) If you plan to print these drawings separately, you can choose any size or orientation that your printer supports. Click on the Page 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 $\frac{1}{4}" = 1"$ 0". Another common scale is $\frac{1}{8}" = 1"$ 0".



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.

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.



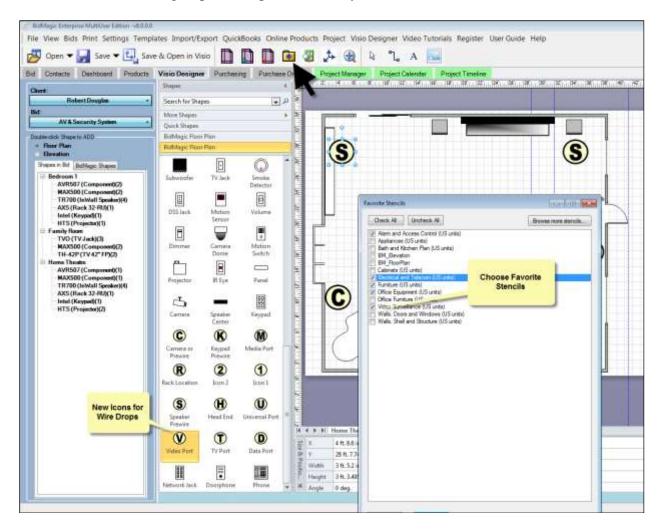
Tracking Shapes in a Bid: Click on Shapes in Bid to view a list of Rooms found in that Bid with Visio Shapes listed in each room. If a bid contains 6 speakers in a room, this window will contain 6 speaker shapes (one for every product that has a shape assigned). Double click a Product to add it to the 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.

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.



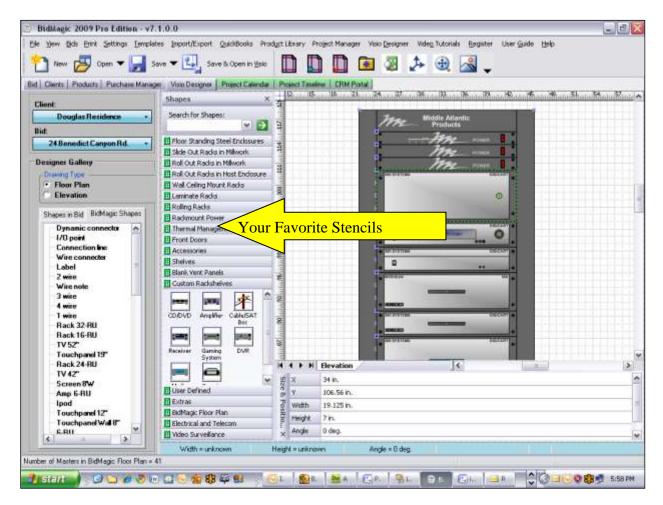
Zooming, Scrolling and Panning in Visio Drawings:

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

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.

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.

Buildings: 2009 Pr	n Táttisin - v7. T.O.O			
	Settings Templetes Import/Export Qualdbooks Product L	Jorary Project Manager Visio Designer	Videg Tutorials Begister User Guide Help	
🚹 New 🛃 Os	ien 🔻 🛃 Save 🔻 🛄 Save & Open in <u>V</u> alo	🗋 🛄 🛄 💽 🖉 .	🔑 🌐 🎗 🔪 A 🔜 .	-
Bid Clientz Productz	Puechane Manager Visio Designer Presect Calendar Pre	sect Tendine CRM Portal		
Client	EndMagic Floor Plan ×	nd Santan Manthur Santan I	Carrie Carrie Martin Ratin R.	• الشيبينية المستق
Douglas Resider				47
Bid	Dynamik, UO perr Convection			o a x
24 Benedict Canyo	nBd - with with a			
Page Setup				
Print Setup Page Size	Drawing Scale Page Properties Law Routing Shac	dows		
Page properties				
Type:	C Eareground @ Background			
Mame:	Page-2			
Bagliground:	None	L.	\bigcirc $$	1
Measurement units:	Feet and Inches			
				I
		4	Letter Let	-
			(11)	
			The	
(77)				
	duitr OK	Cancel	· · · · · · · · · · · · · · · · · · ·	
		H Living Room Page-3 Page-	-2 4 3	3
	TV Wall S2"TV Wall 42" TV Wall 48"		No Selection	
and the second s				
-	<u></u>			
stent 🥼 🥝	🗀 🖉 🔍 🛄 🔂 😵 🕼 🖉 😸 🔄 😒 🖛		1 😫 8: 🍘 6: 🕲 6: 🗘 📿 🖯	🔜 💱 🛃 🚮 12:20 PM

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.

Assigning Visio Shapes to Products in BidMagic Products Manager:

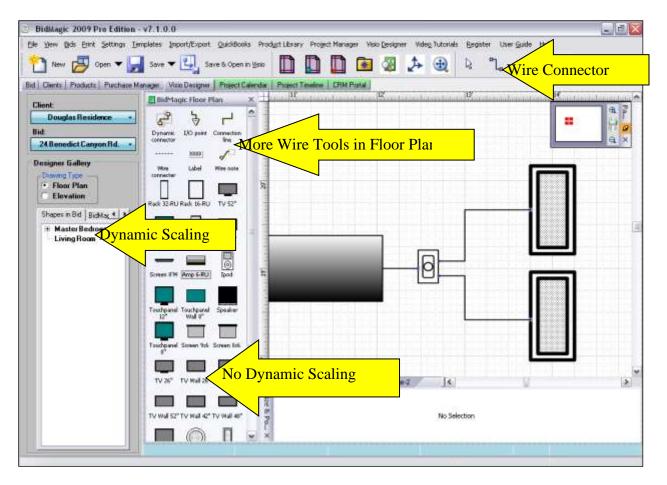
You can assign 2 Visio shapes to each Product in BidMagic. Open a Product in BidMagic's Product Manager page. Then select the Visio shape (VSD) you want to assign for Floor Plans and Elevations. These will automatically be added to the shapes in Bid Folder for Floor Plan and Elevation drawings. If the Product contains dimensions they will be applied to the shape so that it is precisely scaled in Visio.

oduct kris Aodel (required):		Favorite Discontinued		Add New	Image		Veio Roor Plan	and the second se	Bevation
14422		1				3			
Supplier:			Mg Number:	MERIASTISCS	_	100		X	× .
WAD			TH-42PX75U	1		- 1			
ategory:			Mg Name:			1			
deo			Panasonic		Height	Wid		Weight	
			UPC:		34.6	57.9	6.2	32	
				1	Aduluk F	ackage Build	er .		
escription (nequ	and to					ink Packag		Save i	Product before adding Link
Carpelion (requi								del	
adures:									
	nanna is a bashi, mari	Eastern TV Energy	HD formats 1060/12	In Patie card teats	Quant	ey: 1.00	100 - 100	Deleta	Move & Move a
		and a subs	The second reader the	a construction of the second se	10000	Posts.	1		and the second second second
					QTY	UNIT		MFG NAME	DESCRIPTION
					Id Pow	rer Search			
Contraction of the Party of the						1.00 es	MIRUB	Chief Mig.	
Equipment Lab	ar User Que	ckBooks				1.00 ea	TVO	Inhouse	TV outlet whi.
			[2] Ta	z Equip		1.00 ea	MAX500	Panamax	Surge Protec.
	Unit Cost:	%Margin	Sell Price:	0149604					
	\$1,295.00	28.02	\$1,799.00						
MSRP:	\$1,295.00 MAP/Web:		Cont	24					
MSRP: \$1,759.00	\$1,295.00		<u>Cont</u> \$50.00	\$100.00					
	\$1,295.00 MAP/Web:		<u>Cont</u> \$50.00	s100.00 Rack Units:					
\$1,799.00	\$1,295.00 MAP/Web: \$1,545.00	Cable/Hard Unit	<u>Cont</u> \$50.00	\$100.00					
\$1,799.00 Phase:	\$1.295.00 MAP/Web: \$1.549.00 Buy Gty:	Cable/Hard Unit	<u>Cont</u> \$50.00	s100.00 Rack Units:					
\$1,799.00 Phase: Reath •	\$1,295.00 MAP/Web: \$1,545.00 Buy Qiy: 1	Cable/Hard Unit: In • Price:	Cont 550.00	s100.00 Rack Units:					
\$1,759.00 Phase: Reath • Shipping: \$49.00	\$1,295.00 MAP/Web: \$1,549.00 Buy Gry: 1 Total Installed \$2,203.00	Cable/Hard Unit: In • Price:	Çati \$50.00 Hide Option	s100.00 Rack Units:					
\$1,759.00 Phase: Freath • Shipping: \$49.00	\$1,295.00 MAP/Web: \$1,549.00 Buy Gry: 1 Total Installed \$2,203.00	Cable/Hard Unit: In • Price:	Cott \$50.00 Hide Option System:	s100.00 Rack Units:					
\$1,799.00 Phase: Feath • Shipping: \$49.00 reduct UM: Que	\$1,295.00 MAP/Web: \$1,549.00 Buy Gry: 1 Total Installed \$2,203.00	Cable/Hard Unit: In • Price:	Çati \$50.00 Hide Option	3100.00 Rack Units: 0 ⊕					
s1,759.00 Phase: Reat: Shipping: \$45.00 Induct Uit: Que Kemo:	\$1,295.00 MAP/Web: \$1,549.00 Buy Gry: 1 Total Installed \$2,203.00	Cable/Hard Unit: In • Price:	Cott \$50.00 Hide Option System:	5100.00 Sack Units: 0)⊕ Last Updated					
\$1,798.00 Phase: Reath • Shipping:	\$1,295.00 MAP/Web: \$1,549.00 Buy Gry: 1 Total Installed \$2,203.00	Cable/Hard Unit: In • Price:	Cott \$50.00 Hide Option System:	3100.00 Rack Units: 0 ⊕					

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.

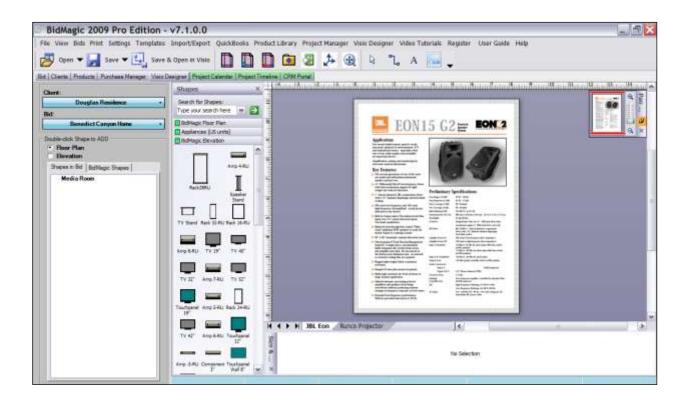


Adding Wiring Connections:

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.

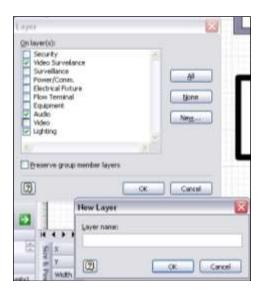
Adding Product Brochures, Cutsheets and Graphics:

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.



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

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 (1).	CTRL+SHIFT+3
Select the Rectangle Tool (□).	CTRL+8
Select the Ellipse Tool (\bigcirc).	CTRL+9
Select the Line Tool (2).	CTRL+6
Select the Arc Tool (CTRL+7
Select the Freeform Tool (CTRL+5
Select the Pencil Tool (2).	CTRL+4
Select the Crop Tool (4).	CTRL+SHIFT+2

Consult Visio Documentation and Help for additional shortcuts.

BIDMAGIC KEYBOARD SHORTCUTS

Use these handy keyboard shortcuts to speed up your work:

F12 Enter/Enter Shift/Enter Shift/Click CTL/Click CTL/Rt Click CTL/A CTL/F CTL/F CTL/G CTL/P CTL/H CTL/R Double Click E5	Open User Registration Info (Help/About) Find Product in Asset Manager Open User Guide Open Print Preferences for Client Copy Open Help/About Refresh Cached Data 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.

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.

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 2013 or newer and Excel 2013 or newer 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 try to add a product to a bid, no window opens for me to select a product. (This can be the result of adding a second monitor and then removing it.).

Solution: Click on the Help Menu/Reset Monitor. This will reset your PC for your current monitor.

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: Default Settings allow you to choose a path where all BidMagic Word and Excel 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 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: Microsoft updates can cause SQL to stop. Right click on Task Manager, Click Services, Click Open Services and locate SQLExpress. Right click to restart SQL. Then restart BidMagic.

🆏 Spatial Data Service	This service	Manual	Local Service
🥋 Spot Verifier	Verifies pote	Manual (Trig	Local Syste
🖏 SQL Server (SQLEXPRESS)	Provides sto Running	Automatic	NT Service
Q SQL Server Agent (SQLEXPRESS)	Executes jo	Disabled	Network S
🥋 SQL Server Browser	Provides SQ	Disabled	Local Service
in could weak to	D 11 11 D 1	A	1 10 1

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: 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. You cannot change the name of Cover pages and Client Templates or they will not print. You can change the names of any opening and closing documents and freely save copies as needed for various jobs.

FAQ'S

Q. Does BidMagic require any other software?

A. To print reports and edit templates Word 2013 or newer is required. Excel 2013 or newer is needed for Excel reports. Office 365 also works. MS SQL Server Express is included and can facilitate up to about 8 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 items in the bid (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 2013 or newer 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. We recommend Cloud hosting for Mac users, but you have the choice. 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?

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 the Tech Calendar mobile apps in the app stores.

Q. Can I host BidMagic is the Cloud to access from any PC or Mac??

A. Yes, we now have a very robust cloud hosting option. This is much better than a remote desktop connection and requires zero installation for users and the full power of BidMagic can be accessed via a simple web page.

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

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 include their total price in Cable/Hardware or in Total Equipment. 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 feature requests.

Q. When does the software assurance need to be renewed?

A. The software assurance plan requires renewal by January 31 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.