

BMD Q

EMPLOYEE OWNED. BUILDING PARTNERS.

MANUFACTURING

USER MANUAL



BMDMFG.COM/RESOURCES

- **Getting Started: Set Up and Overview**

- Overview of Main Tabs
- Clients & Pricing Metrics
- Settings [Admin]

- **Starting a Project and Quoting**

- Details Tab and Required Fields
- Add a Quote
- Defaults Tab
- Quote Items
 - + Add Frame
 - + Add Freehand Item
 - + Margin & Price Adjustment

- **Asking for Help**

- Request Support
- Request Custom Item

- **Reports**

- Overview of Report Types
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- **Creating a Proposal for the Customer**

- Issue

- **Placing an Order**

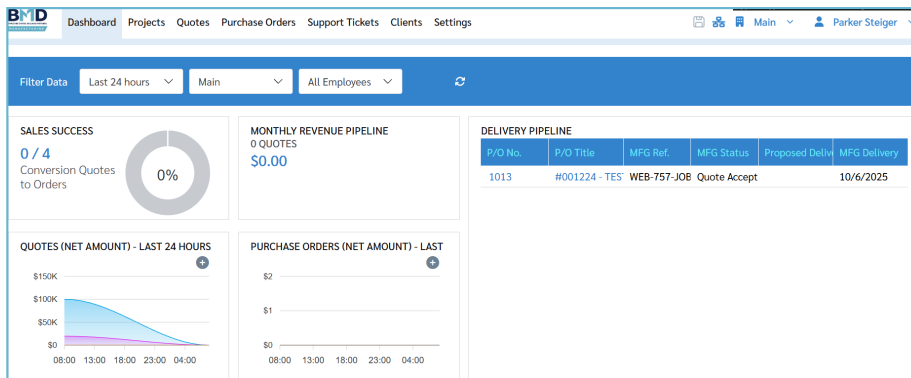
- Accept

- **Additional Notes**

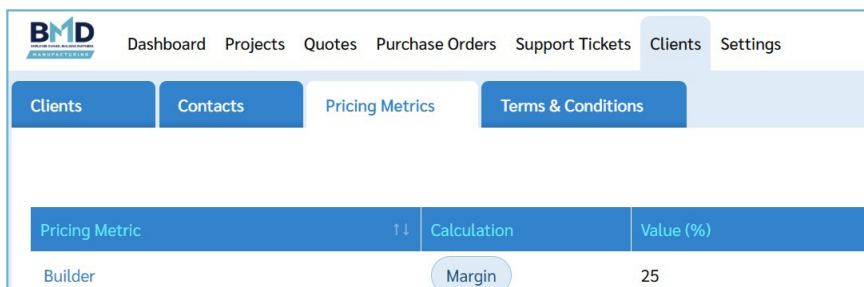
- Rejecting Quotes
- Rejected Orders
- Making Copies

Getting Started

When you log into BMD-Q you will land on your **Dashboard** Tab
 Your company logo will be on the top left corner, your Company Name, and Username will be on the top right corner.



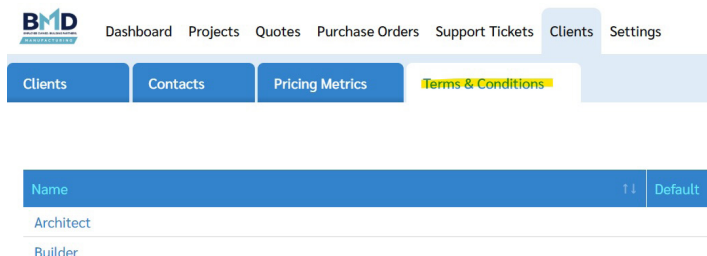
The Dashboard contains an overview of your **Issued Quotes** and **Accepted Orders**. Before you begin to build Projects and Quotes, go to the **Clients Tab** and click on the **Pricing Metrics** subtab.



The screenshot shows the 'Pricing Metrics' subtab with the following table:

Pricing Metric	Calculation	Value (%)
Builder	Margin	25

The **Pricing Metrics** defines the Margin that will be applied to any project with the client type you define. You can set up as many Pricing Metrics as needed and can edit at any time.



The screenshot shows the 'Terms & Conditions' subtab with the following table:

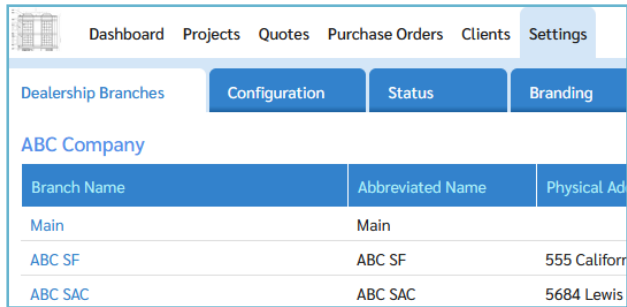
Name	Default
Architect	
Builder	

Each Pricing Metric can have its own **Terms & Conditions** if desired.

Settings Tab: Admin

The **Settings Tab** contains 5 Subtabs.

Dealership Branches set up multiple locations as needed.



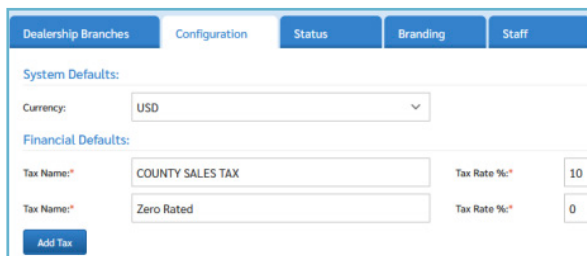
Dashboard Projects Quotes Purchase Orders Clients **Settings**

Dealership Branches Configuration Status Branding

ABC Company

Branch Name	Abbreviated Name	Physical Ad
Main	Main	
ABC SF	ABC SF	555 Califor
ABC SAC	ABC SAC	5684 Lewis

The **Configuration Tab** is where you set any Tax Rates for your area.



Dealership Branches Configuration Status Branding Staff

System Defaults:

Currency: USD

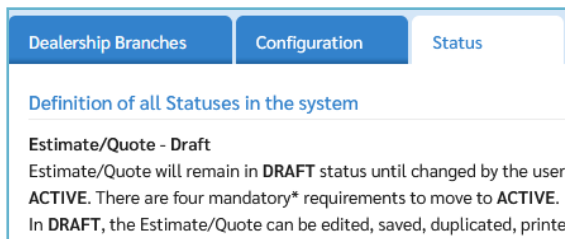
Financial Defaults:

Tax Name*	Tax Rate %*
COUNTY SALES TAX	10
Zero Rated	0

Add Tax

Status is where you can review BMD-Q Status definitions.

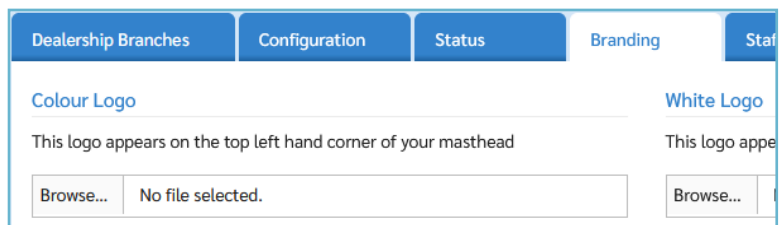
Branding is where you upload your company logo.



Dealership Branches Configuration **Status**

Definition of all Statuses in the system

Estimate/Quote - Draft
 Estimate/Quote will remain in **DRAFT** status until changed by the user **ACTIVE**. There are four mandatory* requirements to move to **ACTIVE**. In **DRAFT**, the Estimate/Quote can be edited, saved, duplicated, printed



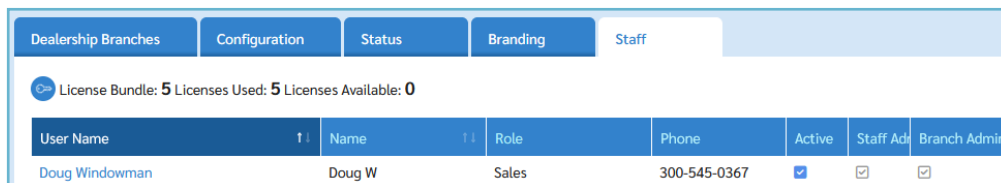
Dealership Branches Configuration Status **Branding** Staff

Colour Logo White Logo

This logo appears on the top left hand corner of your masthead This logo appears on the top right hand corner of your masthead

Browse... No file selected. Browse...

The **Staff Tab** is where you add or edit permissions for your staff.



Dealership Branches Configuration Status Branding **Staff**

License Bundle: 5 Licenses Used: 5 Licenses Available: 0

User Name	Name	Role	Phone	Active	Staff Ad	Branch Admin
Doug Windowman	Doug W	Sales	300-545-0367	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

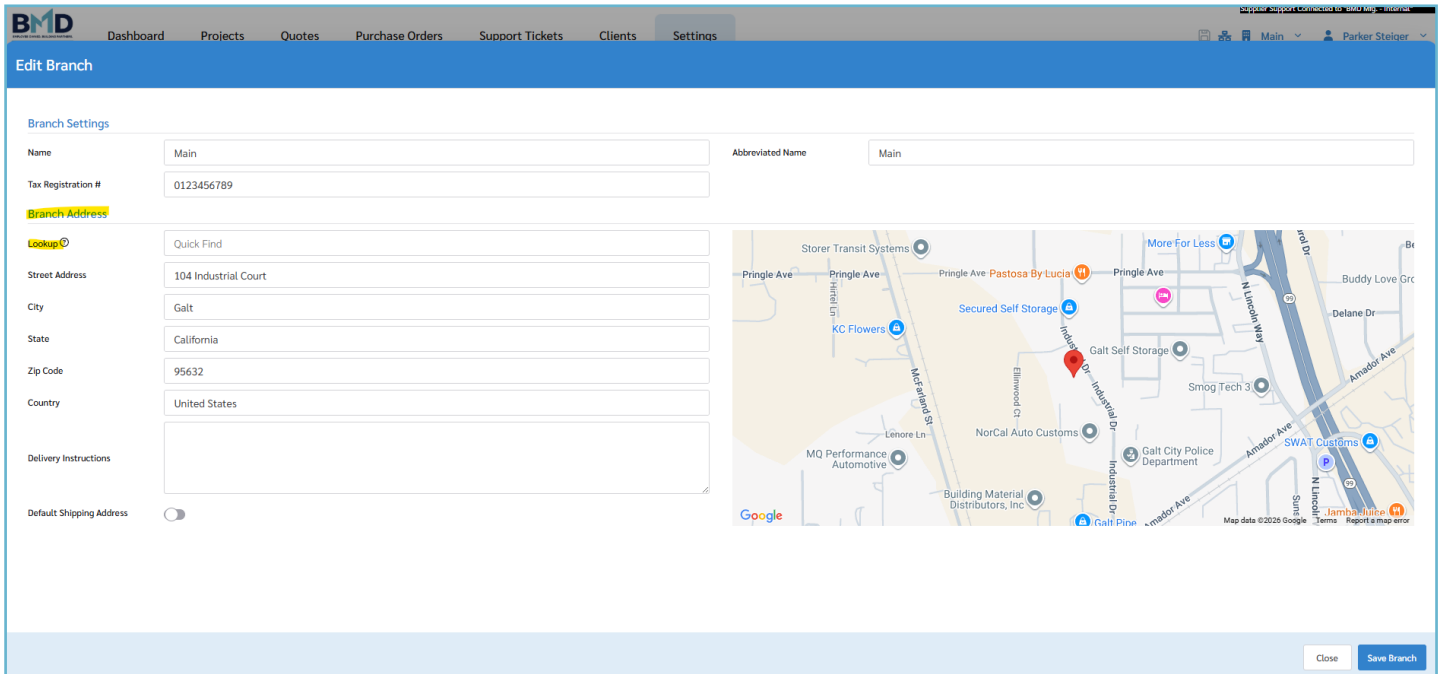
* If more User Licenses are required, contact your BMD Mfg. representative

Settings Tab: Admin

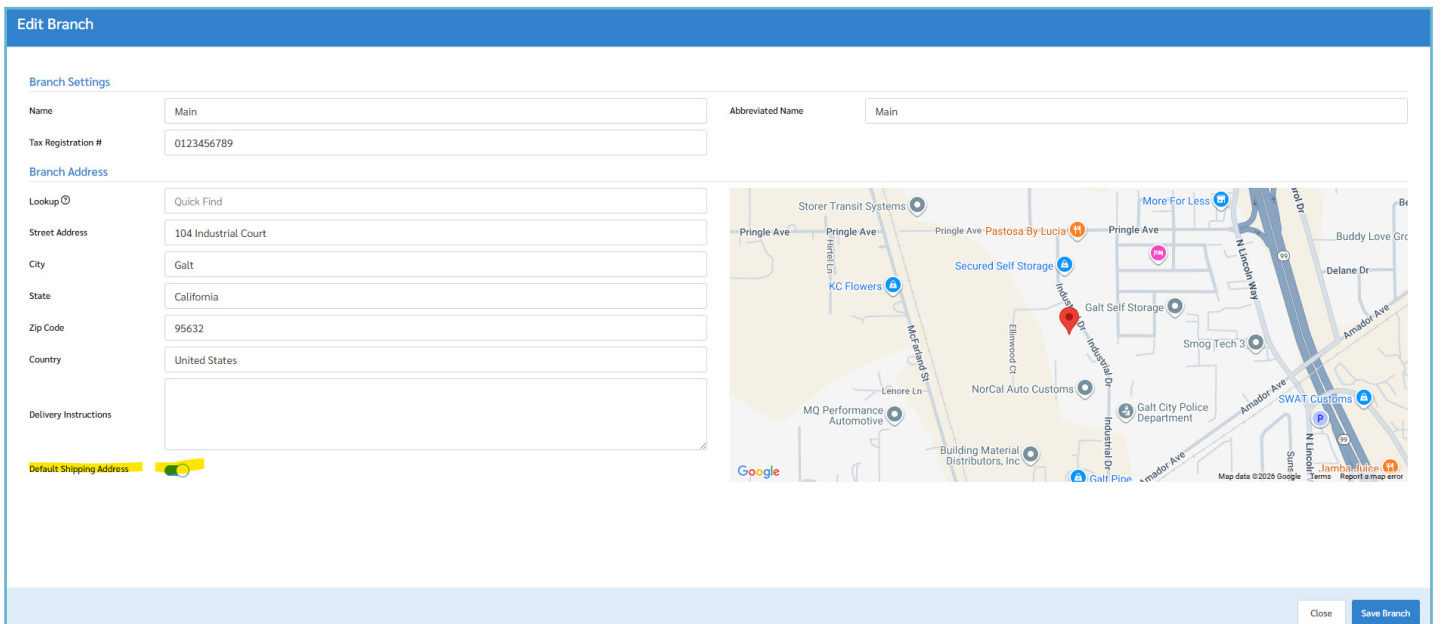
To add a default delivery location, **Branch Address** (Delivery location) must be set up.

Click **Branch Name**

Enter **Branch Address** using the Address Lookup input

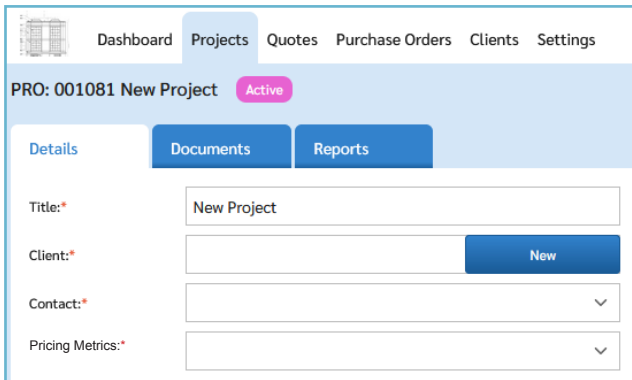


Click **Default Shipping Address:**



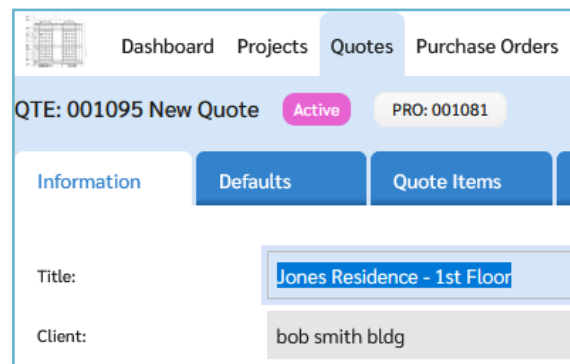
Starting a Project and Quoting

A **Project [PRO]** contains the 'Header' information such as the *Client, Client Type and Project Address*[^]. It is recommended to always begin with a **Project** then you can add multiple **Quotes [QTE]** within that Project.

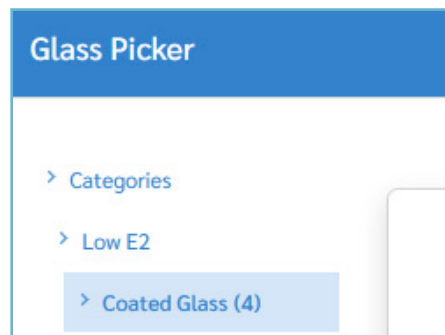
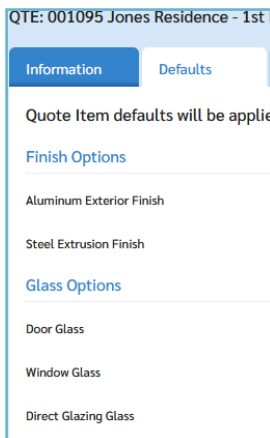


Items with a red * are required fields. Note: Client & Pricing Metrics should have already been established.

When you Add Quote, you will be asked for the Title again. This is to separate Quotes within a Project such as a phased Project.



The Defaults Tab will contain choices for the product line(s) that are available to you.



Some choices will be a list, and some will have a 'picker' with visual cues.

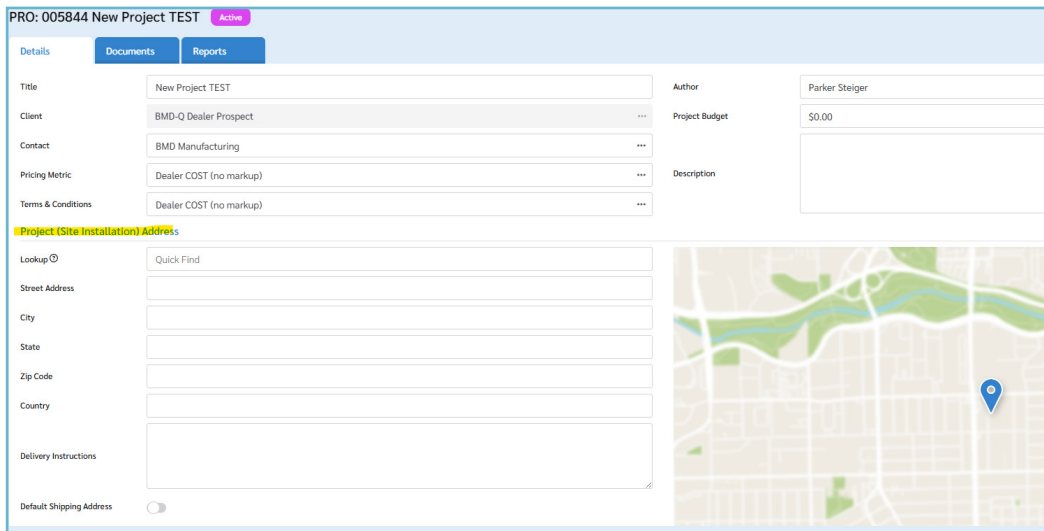
[^] Delivery to Project Address will incur an Additional fee.

Starting a Project and Quoting

If the **Project Address** is different than the **Delivery Address**, this information should be input.

Project Address:

Does not need to be filled out to Create a Project or Quote, however it does need to be filled out to Issue a Quote.



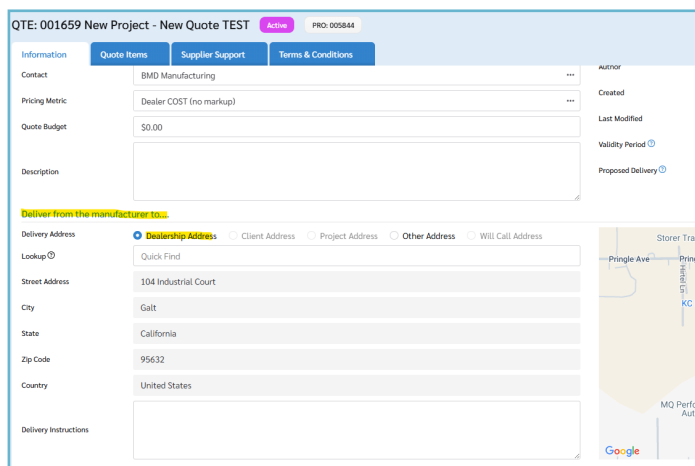
Delivery Address:

Default **Delivery Address** should always be **Dealership Address**.

Default **Delivery Address** is entered in the **Settings Tab** under **Dealership Branch**,

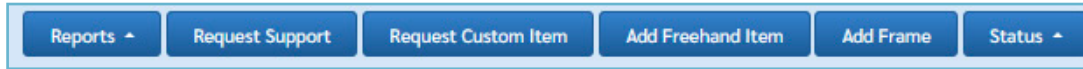
Physical Address.

If any other Address Types are selected a job-site delivery charge may apply.



Quote Items

On the **Quote Items** Tab, there are six buttons located at the bottom



Freehand Item

Include pricing for NON BMD Mfg. items in one proposal.
Adjust Margin if needed
<See Pricing>

Freehand Item

Title: *	<input type="text" value="New Freehand Item"/>
Description:	<input type="text" value="** any NON BMD Mfg item or Service **"/>
Quantity:	<input type="text" value="1"/>
Unit Cost:	<input type="text" value="\$0.00"/>
Total Cost:	<input type="text" value="\$0.00"/>
Notes:	Items added with this feature will be included on your Proposal to your customer.

Margin and Price Adjustments

Your Sell Margin is set by Client Type. Client Type may be changed at any time at the QTE or PRO level, but you may also override the Margin or adjust pricing per line item if needed.

To the right of any line item click the ellipsis ... and choose the abacus



Dealership

Margin (default 15%):	<input type="text" value="15"/>
Sub Total:	<input type="text" value="\$3,479.72"/>
Price Adjustment:	<input type="text" value="\$0.00"/>
Sell Price:	<input type="text" value="\$3,479.72"/>

Dealership

Margin (default 15%):	<input type="text" value="20"/>
Sub Total:	<input type="text" value="\$3,697.20"/>
Price Adjustment:	<input type="text" value="\$50.00"/>
Sell Price:	<input type="text" value="\$3,747.20"/>

* Delivery to Project Address will incur an Additional fee.

Quote Items - Continued

The Customer will see only The Sell price. Any adjustments are only visible on the Internal View Report* **<See Reports section>**

INTERNAL VIEW ONLY INTERNAL VIEW ONLY INTERNAL VIEW ONLY

Extended List Price	Buying Multiplier	Supplier Price Adj	Dealer Cost	Margin	Price Adj	Selling Price
\$4,182.61	0.39	\$0.00	\$1,631.22	15.00%	\$0.00	\$1,919.08
\$0.00	0.00	\$0.00	\$0.00	15.00%	\$0.00	\$0.00
\$9,930.48	0.39	\$0.00	\$3,872.89	20.00%	\$50.00	\$4,891.11

Asking For Help

There are two options for asking for help in BMD-Q.






Request Support applies if you need a minor adjustment to items that you have already built. Such as Custom Color or approval for oversized etc.

Request Custom Item is used when the item you want is something you can Not build yourself. Such as 90 Degree Corner Unit, Rake or custom shapes.

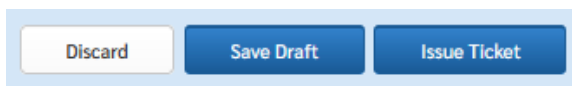
Support Request Draft

Title:

Brief

H B I   66 

Brief Explanation of your request goes here.
 you can also add an attachment below.
 click the ISSUE TICKET button to send into Customer Service



Custom Item Draft

Title:


Quantity:

Supplier Reference:

Supplier Unit Price:


Notes:

Thumbnail



Supplier to upload


Shop Drawing




Choose Files

Add Comments

brief description of your custom item goes here.
 Be sure to add an attachment below for reference.
 click the Post Comment button, then click the Issue Ticket Button to send.

Attachments 

x  BMD-Q RAKE_Example.pdf

Reports

There are 6 pre-set Reports available. You can print before the Quote is Final, or when you are ready to “Issue” the proposal to the customer. The system will automatically save a copy attached to the Project PRO and will email you a link to the Report so you can file where you prefer.

Found under the **Reports** tab:

Full Detail

No Line Item Price

With Item Price, No Dimensions

No Price

Dealer Internal View, Multiplier

Shop Drawings

PRO: 001011 The Cool House Active

Details Documents Reports

Generated Documents

Creation Date	File Name
Quotes	
QTE: 001013 - Nice Windows (Author: Daniel Hobbs)	
4/17/2024 2:16:23 PM	#001013 - Dealer Internal View, Multiplier.pdf
4/17/2024 2:16:23 PM	#001013 - With Item Price, No Dimensions.pdf

Reports

Information ✕

You will be emailed a link to the document when it is ready

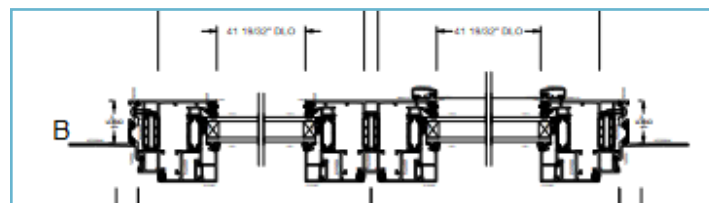
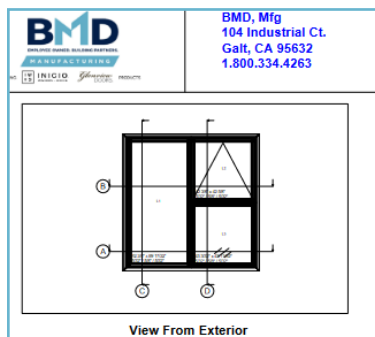
Email link:

The following reports were requested on [Quote #001088-001](#) and are ready for viewing.

- [Draft #001088-001 - Full Detail Quote.pdf](#)

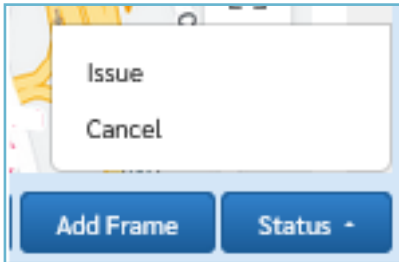
BMD Manufacturing Team
quotes@bmdmfg.com
 Phone: (800) 334-4263

The Shop Drawing Report will draw any window or door built in BMD-Q. The drawings include measurements and section details.

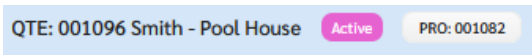


Issue a Formal Proposal

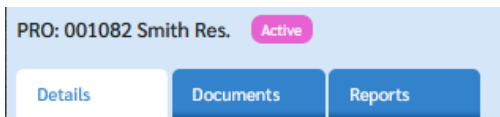
Once you have created a QTE and you are ready to Print a formal Proposal to your customer, click the Status button and choose **ISSUE**. This will automatically generate a copy of each of the types of Reports. Customer should review and sign the Full Detail Report.



You will automatically be emailed links to all Reports, but you can also find them in BMD-Q. Click the link to go back to the PRO view.



Once you are on this view, you will see 2 tabs Reports and Document.



*The Document tab will take you back to a listing of any QTE that are associated with this PRO. '-001' is a copy/alternate of the original, and the different QTE # is a separate quote that can be ordered separately.

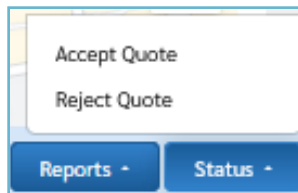
Details			Documents	Reports
Quotes				
Date	Quote No.	Quote Title		
4/18/2024	QTE: 001096	Smith - Pool House		
4/18/2024	QTE: 001096-001	Smith - Pool House- alternate		
4/18/2024	QTE: 001097	ADU		

Accept the QTE for Order

To place a QTE as an Order, first your QTE must have been officially ISSUED.

QTE: 001094-001 2nd floor alternate Issued PRO: 001080

Once your QTE is in ISSUED status, the option under Status will change to ACCEPT Quote, Reject Quote.



The last step is to add your Purchase Order Number. Once you enter your PO and send, your Order will go into our Technical Review process. Your order will be manually reviewed for any inconsistencies or red flags.

Technical Review

This Quote will now be submitted to **BMD Mfg.** for a Technical Review.
*If approved without changes, the P/O will be dispatched to **BMD Mfg.***

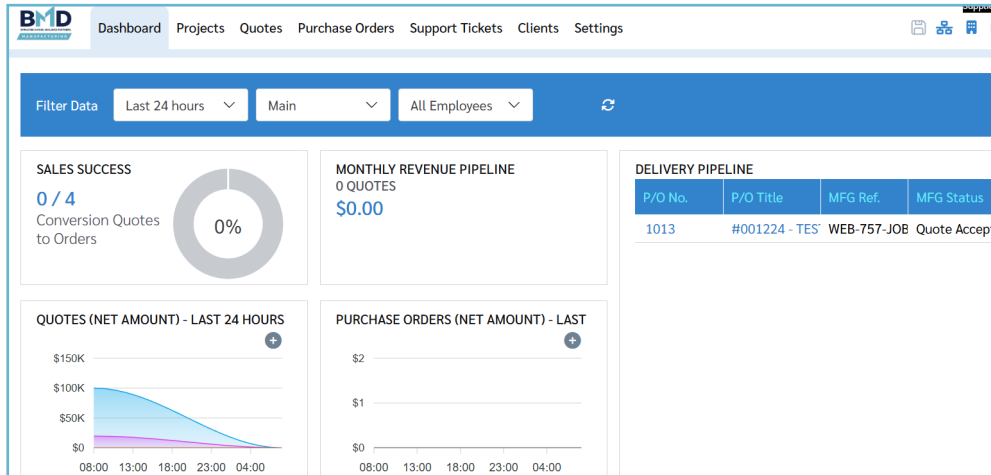
ABC Company Order No: *

Your status now shows **Accepted.**

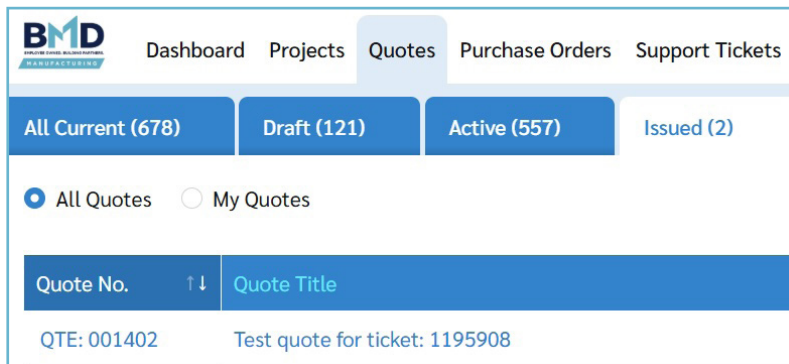
QTE: 001094-001 2nd floor alternate Accepted PRO: 001080

Accept the QTE for Order - Continued

Once the order has been reviewed and approved you will see it listed on your Dashboard.



To Look at all Issued QTE – waiting for Approval, go to the Quotes tab, and use the Issued Sub-tab.

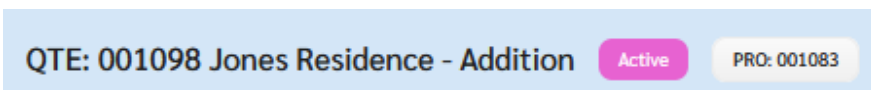


Additional Notes

When Quoting individual Items, you can **copy a line** by clicking on the ellipses ... to the right of the line. You can also Edit the item, or adjust the pricing here.



If you want to **Copy a QTE**, click the PRO to go to the Project View.



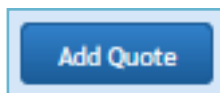
On the Documents tab, locate the QTE, and click on the ellipses ...

Quote No.	Quote Title	Type	Status	Amount	...
QTE: 001098	Jones Residence - Addition	Quote	Active	\$30,231.23	...

A copy/ alternate will have a dash + additional numbers to indicate that it is a copy.

Details			Documents	Reports
Quotes				
Date	Quote No.	Quote Title		
4/19/2024	QTE: 001098	Jones Residence - Addition		
4/19/2024	QTE: 001098-001	Jones Residence - Addition		

If you want to create a new QTE in the same project, use the Add Quote button instead. This QTE will have a new number.



Date	Quote No.	Quote Title
4/19/2024	QTE: 001098	Jones Residence - Addition
4/19/2024	QTE: 001098-001	Jones Residence - Addition
4/19/2024	QTE: 001099	Jones Res - Pool House

Additional Notes - Continued

Cancel / Delete

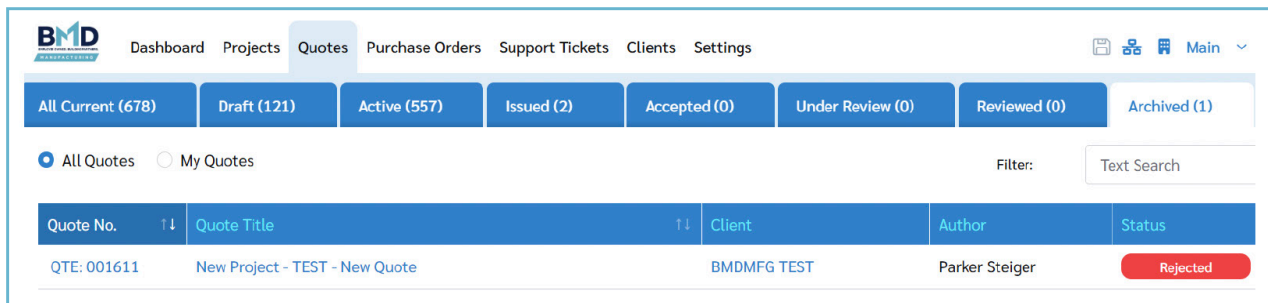
A Customer may cancel a QTE, and you can change the status to Cancel. If they change their mind, you can copy a cancelled QTE, and the copy will be Active.

Date	QTE No.	QTE Title	Type	Status
4/19/2024	QTE: 001098	Jones Residence - Addition	Quote	Cancelled

Once you ISSUE a QTE, you cannot make a change <edit>. You would need to Cancel the issued QTE and make a new, active copy.

If you ISSUE a QTE, and Customer ACCEPTS <order is placed>. This puts the order in Technical Review. At this point, the review team may choose to Approve the order and send to production, Edit Revise the Order or Reject the Order.

To Find QTE that have been cancelled or rejected, use the Sub-tab for Archived Projects.



The screenshot shows the BMD Manufacturing software interface. The top navigation bar includes 'Dashboard', 'Projects', 'Quotes', 'Purchase Orders', 'Support Tickets', 'Clients', and 'Settings'. Below the navigation bar, there are several filter buttons: 'All Current (678)', 'Draft (121)', 'Active (557)', 'Issued (2)', 'Accepted (0)', 'Under Review (0)', 'Reviewed (0)', and 'Archived (1)'. There are also radio buttons for 'All Quotes' and 'My Quotes', and a 'Filter:' dropdown menu with a 'Text Search' input field. Below the filters is a table with the following columns: 'Quote No.', 'Quote Title', 'Client', 'Author', and 'Status'. The table contains one entry: 'QTE: 001611', 'New Project - TEST - New Quote', 'BMDMFG TEST', 'Parker Steiger', and 'Rejected'.

*Technical Review will NOT Cancel or Revise your Order without first contacting you. Note the QTE number on the Revised version has an 'R'.

If you or the Customer changes their mind, you can ISSUE a Revised QTE,

For a Cancelled or Rejected QTE, you can make a new Copy that is Active, and go through the process of ISSUE and ACCEPT again.