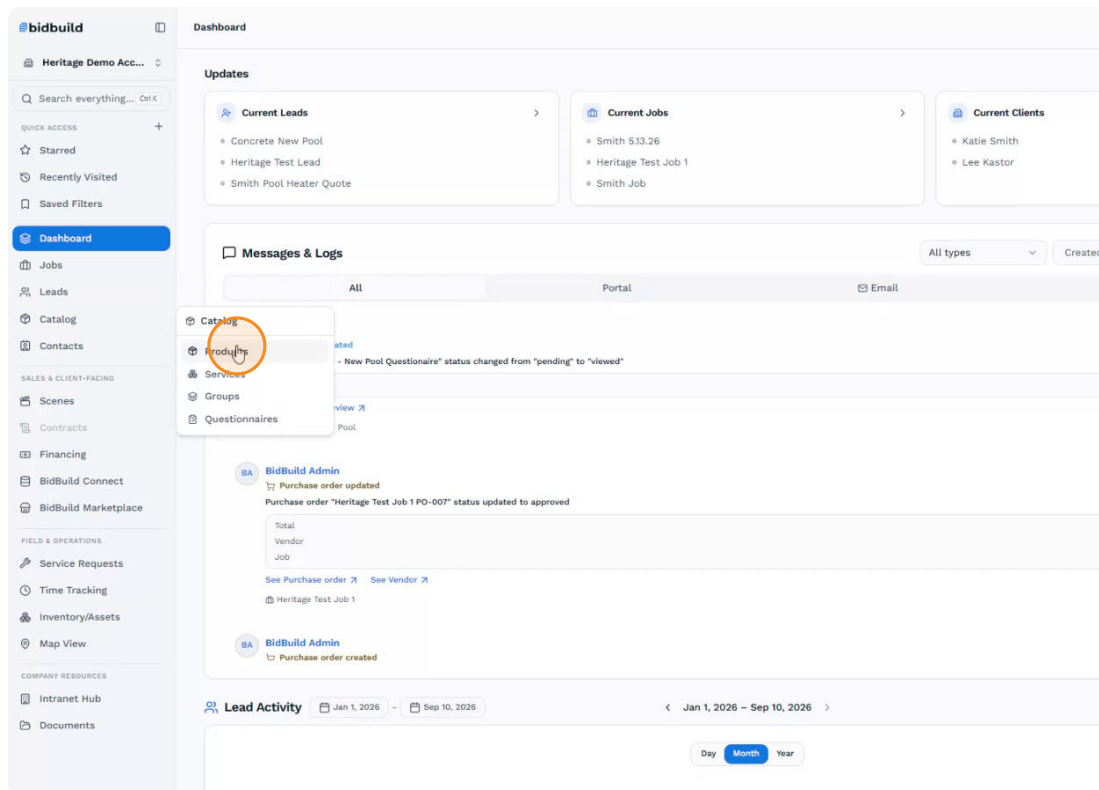


Managing Products in BidBuild

This document explains how to view, filter, integrate, purchase, and create products within the BidBuild Catalog, including use of integrations like Heritage, cost checks, and detailed product configuration.

Step 1: Open the Products Catalog

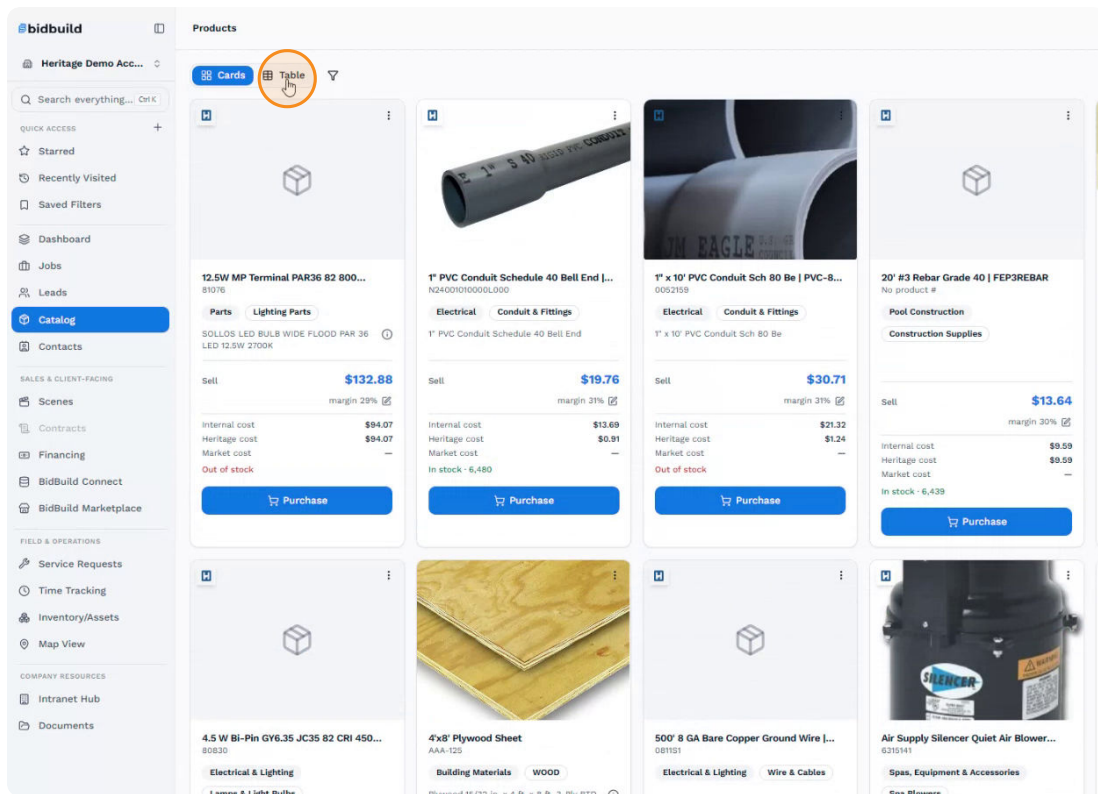
From the left-hand menu, go to **Catalog** and select **Products**.



Inside this area, you will see a **card view** of all products currently installed in BidBuild.

Step 2: Switch Between Card and Table Views

To change how products are displayed, select the **Table View** option to see your products in a table format instead of cards.

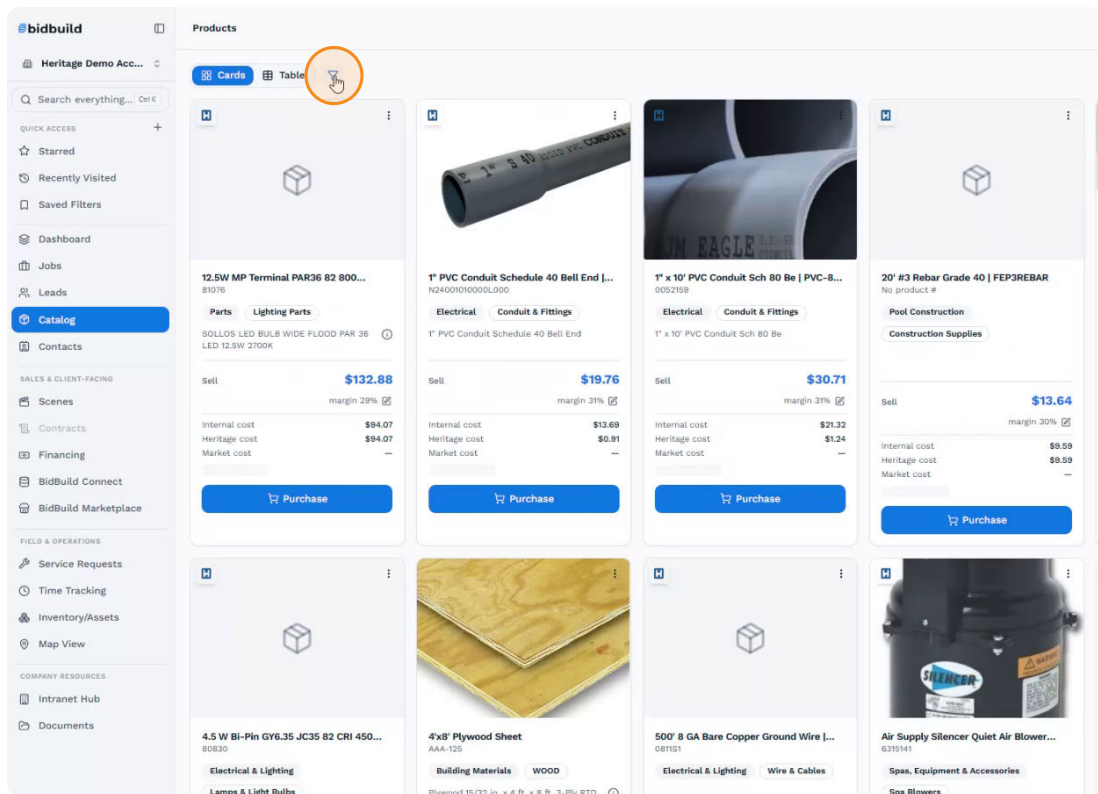


Step 3: Filter Products

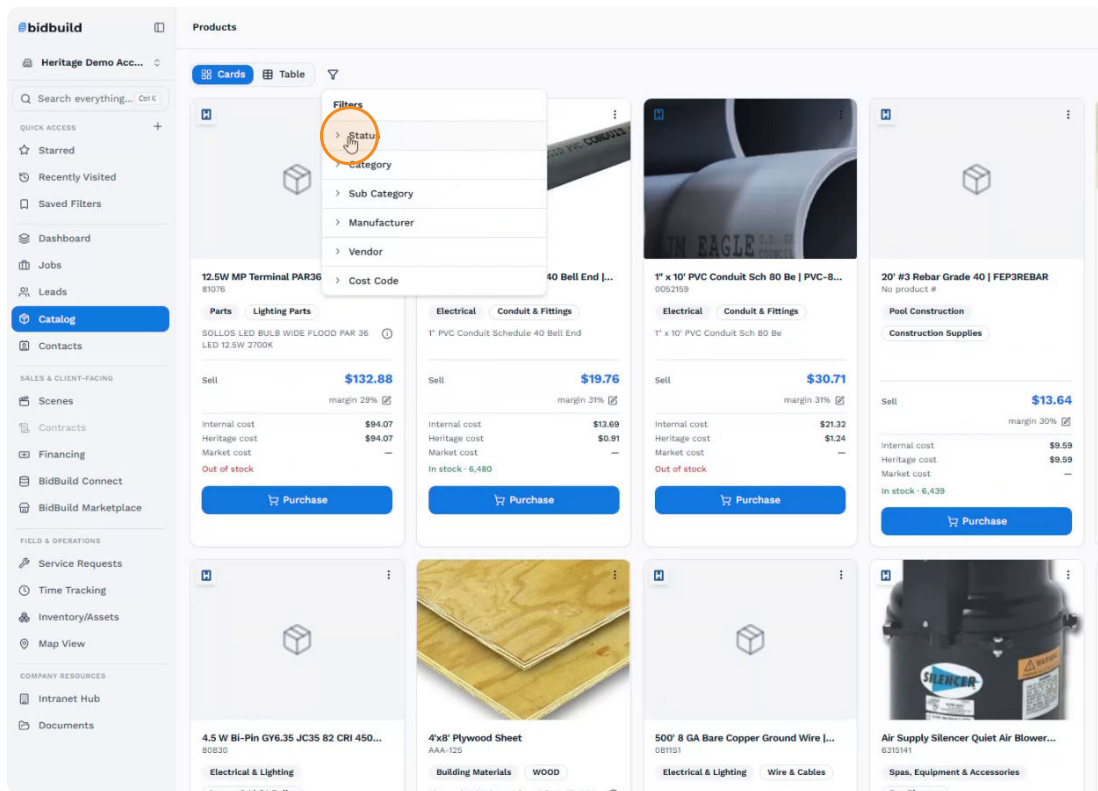
Use the **Filter** option to narrow down the list of products.

Product Name ^	Product Number ^	SKU ^	Material Vendor ^	Cost Code ^	Category ^
12.5W MP Terminal PAR36 82 800 ...	81076	—	Hayward Pool Products	Default Cost Code	Parts
1" PVC Conduit Schedule 40 Bell E...	N24001010000L000	—	Heritage Supply Group	Default Cost Code	Electrical
1" x 10' PVC Conduit Sch 80 Be P...	0052159	—	Heritage Supply Group	Default Cost Code	Electrical
20' #3 Rebar Grade 40 FEP3REBAR	—	—	—	NOT USED	Pool Construction
2"x4"x8' Lumber Wood	AAA-5022	—	SUPERIOR POOL PRODU...	NOT USED	Building Materials
4.5 W Bi-Pin GY6.35 JC35 82 CRI ...	80830	—	Hayward Pool Products	Default Cost Code	Electrical & Lighting
4x8' Plywood Sheet	AAA-125	—	SUPERIOR POOL PRODU...	NOT USED	Building Materials
500' 8 GA Bare Copper Ground Wi...	081151	—	Heritage Supply Group	NOT USED	Electrical & Lighting
Air Supply Silencer Quiet Air Blow...	6315141	—	—	Default Cost Code	Spas, Equipment &...
Aladdin Carded Pump Seal AS-201	AS201	—	—	Default Cost Code	Uncategorized
Aladdin GO-KITS for Pentair Chall...	GOKIT5	—	—	Default Cost Code	Uncategorized
Aquastar Perfect Circle 20"- Whit...	PC101	—	Heritage Supply Group	NOT USED	Parts
Backwash Valve 8034J	8034J	—	Jandy Water Products	Default Cost Code	Filters
Basecrete Compound, Gray, 50 lb	BCG0250	—	Heritage Supply Group	NOT USED	Pool Construction

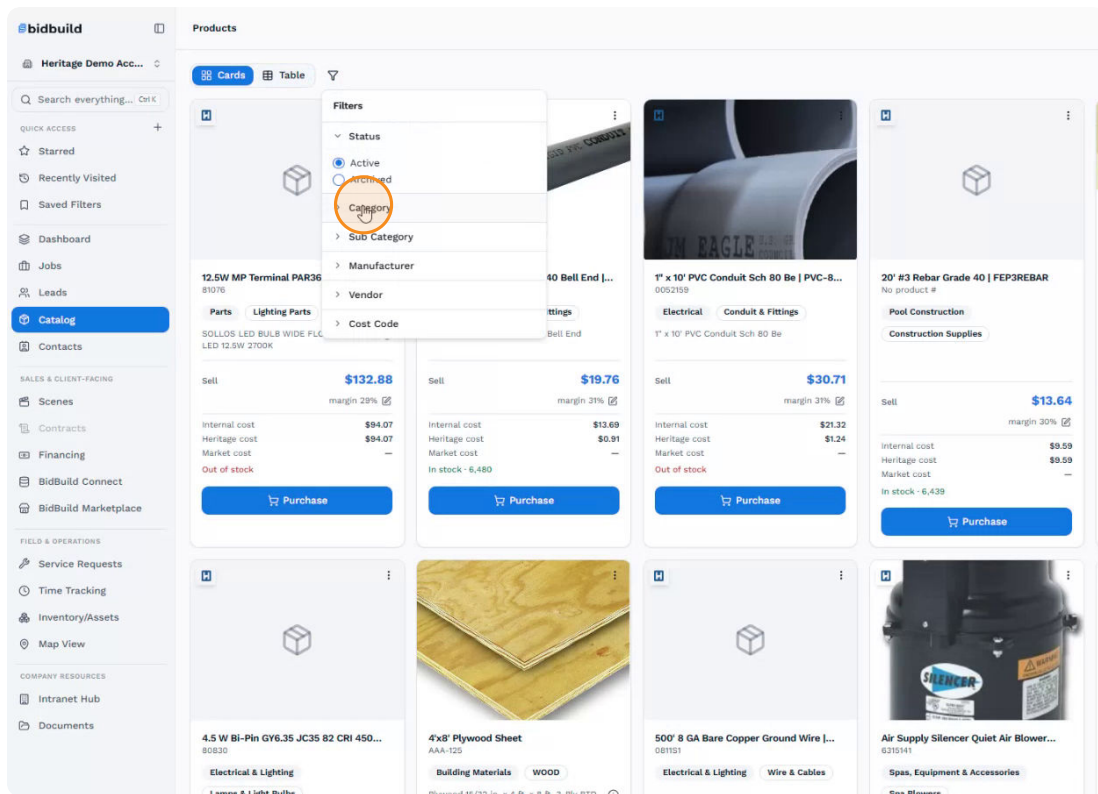
You can filter your options by:



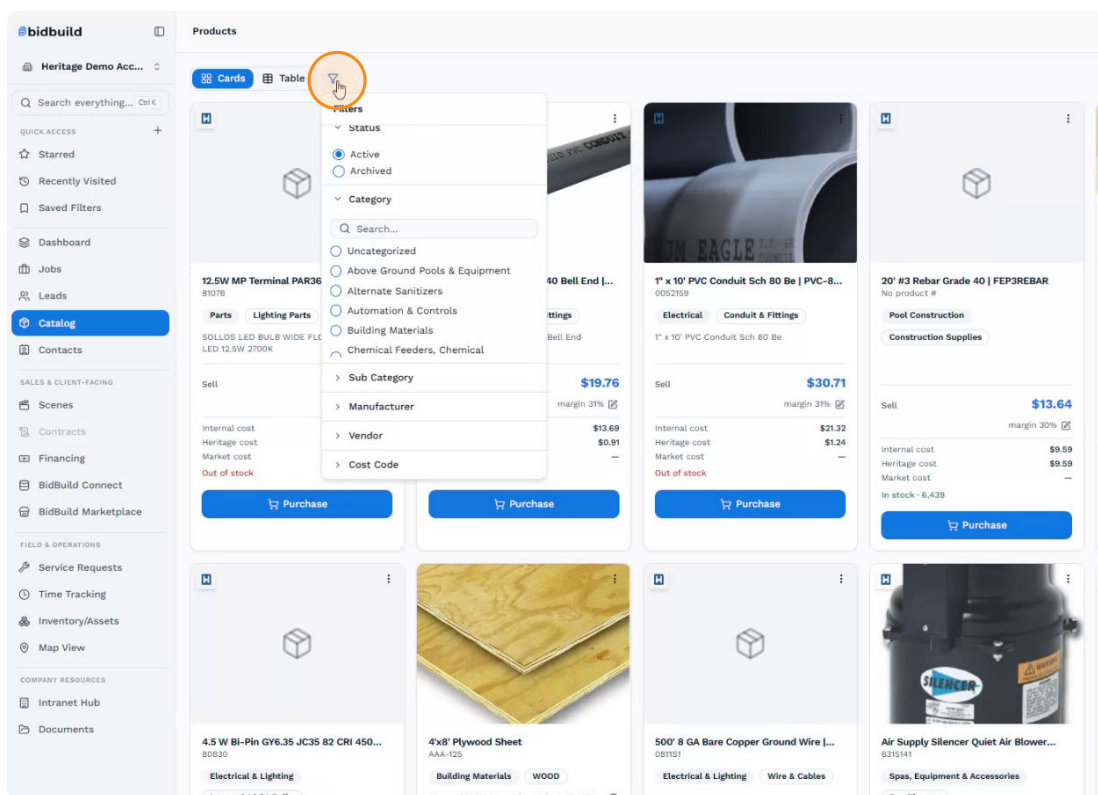
- Statuses



- Categories

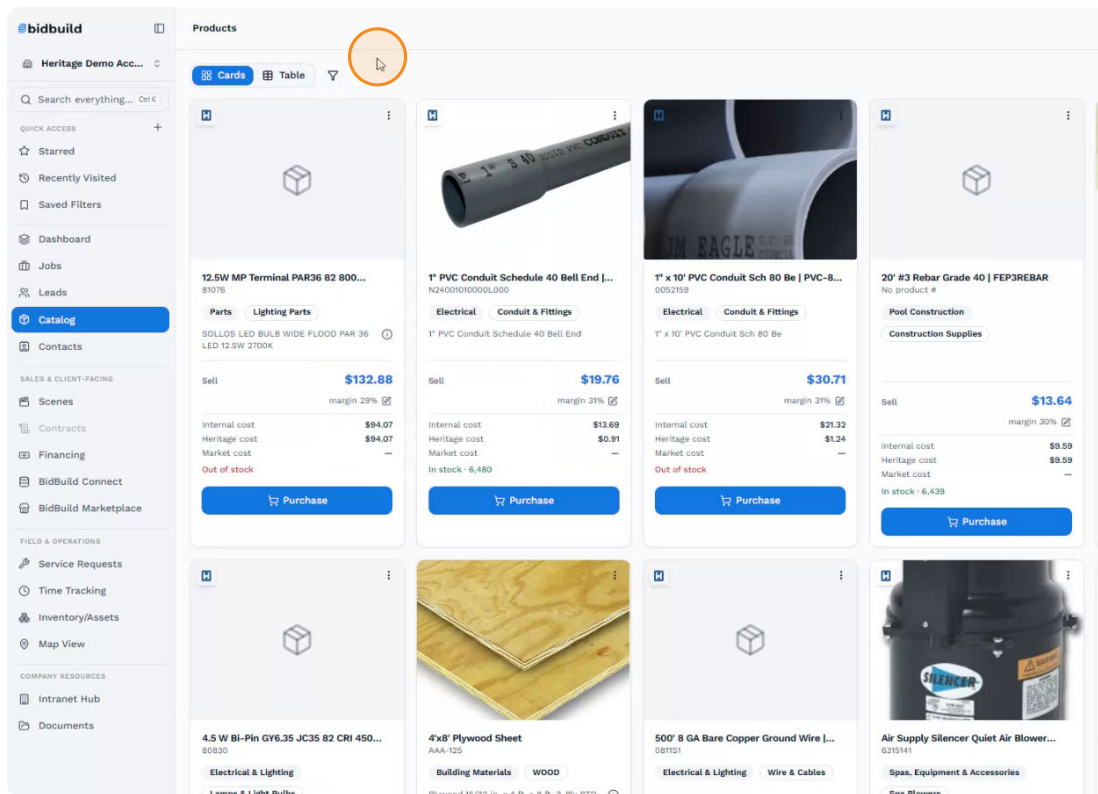


- Subcategories
- Manufacturers
- Vendors
- Cost codes



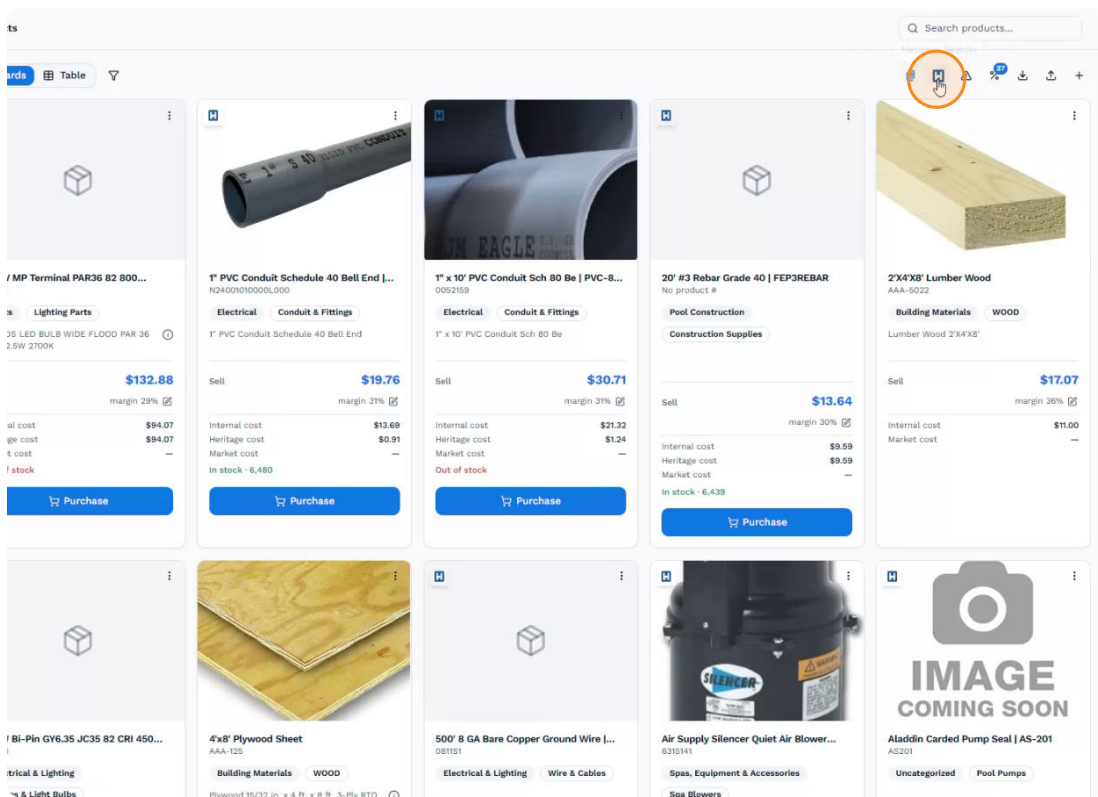
Step 4: Use Product Integrations

On the right side of the screen, you will see your available **integrations**.

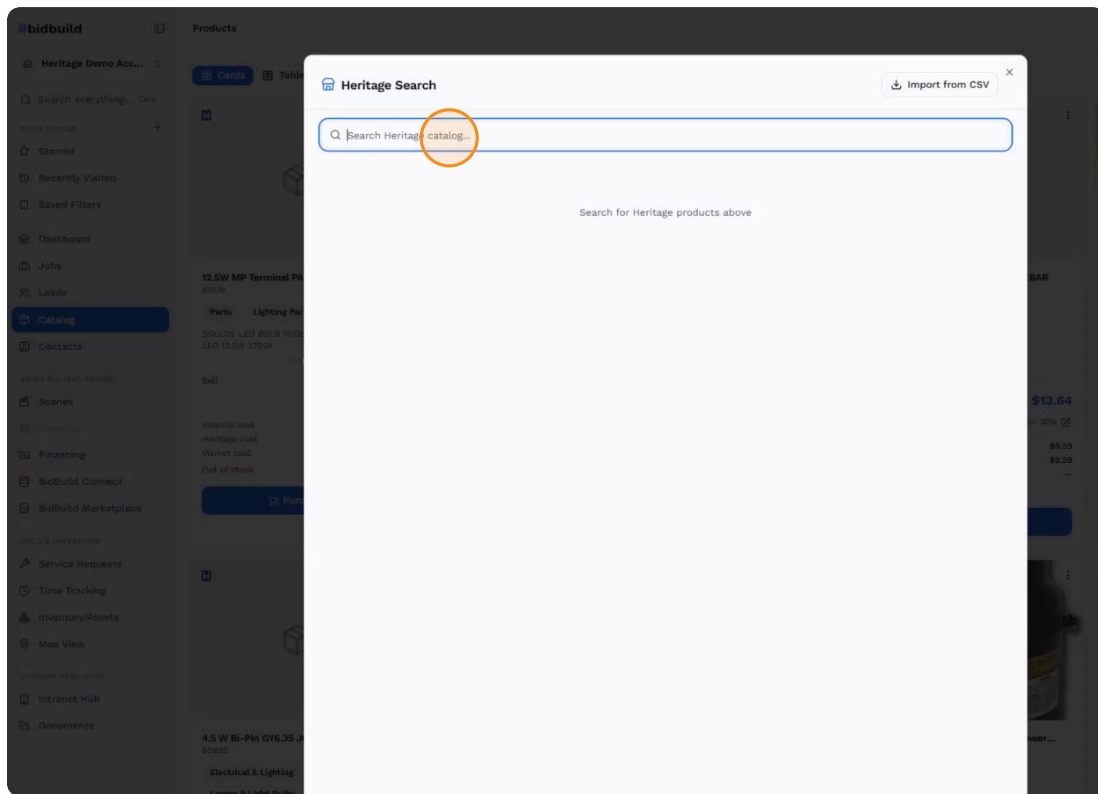


If these integrations are installed, their icons will appear:

- **Marketplace Search:** Allows you to purchase products directly from the **bidbuild.shop** store.
- **Heritage Integration:**



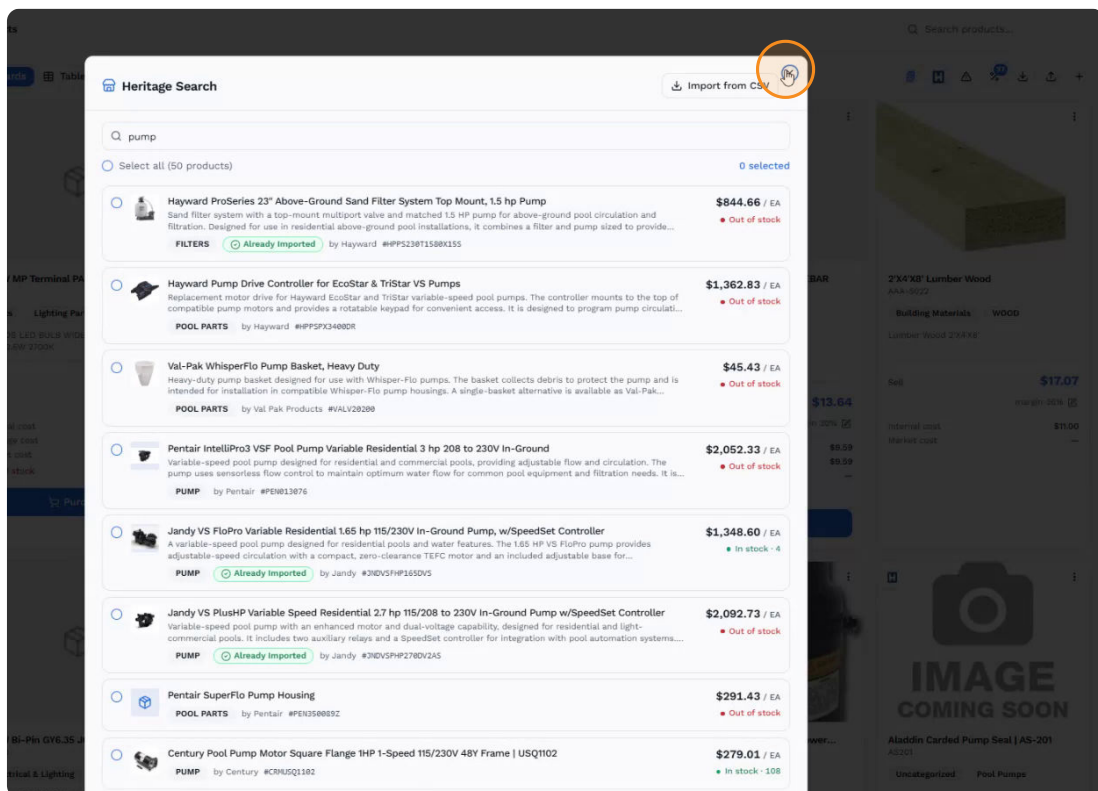
Allows you to search for products that Heritage has live.



Within the Heritage search, you will see products by category, current cost, and current available stock inventory. If you already purchase products from Heritage, you can import them using a **CSV** file.

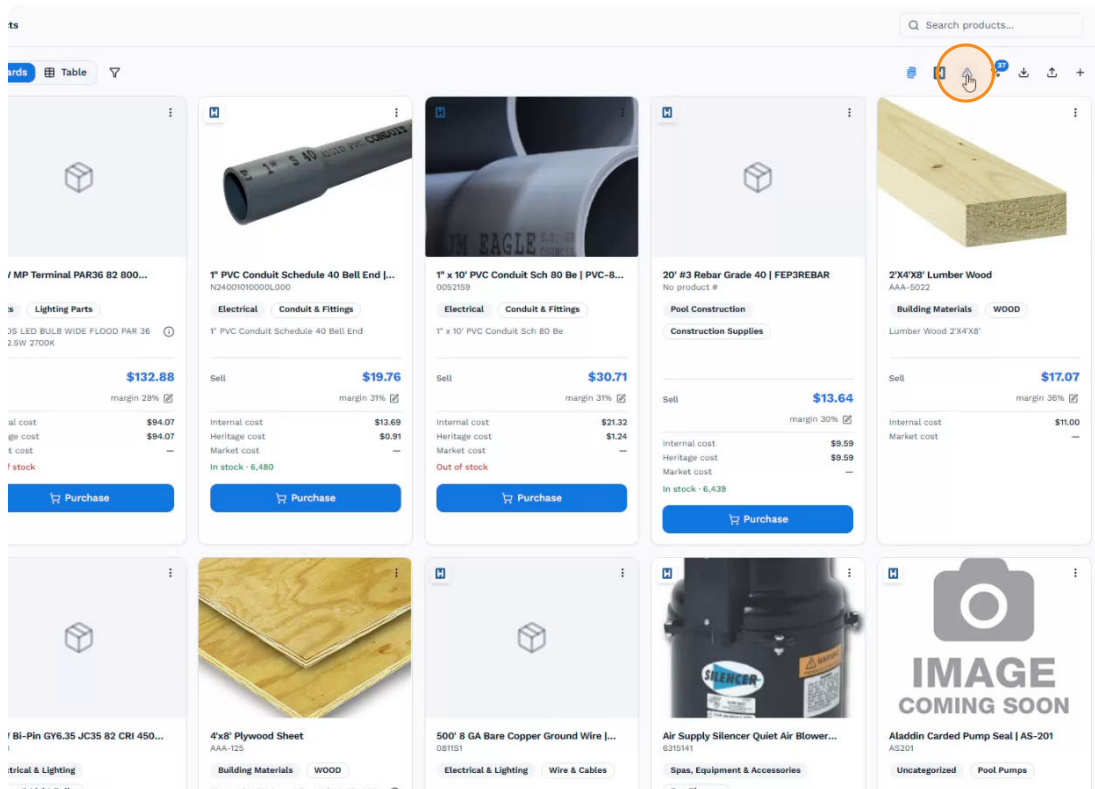
Step 5: Monitor and Adjust Product Costs with Cost Check

Next, use the **Cost Check** tool.

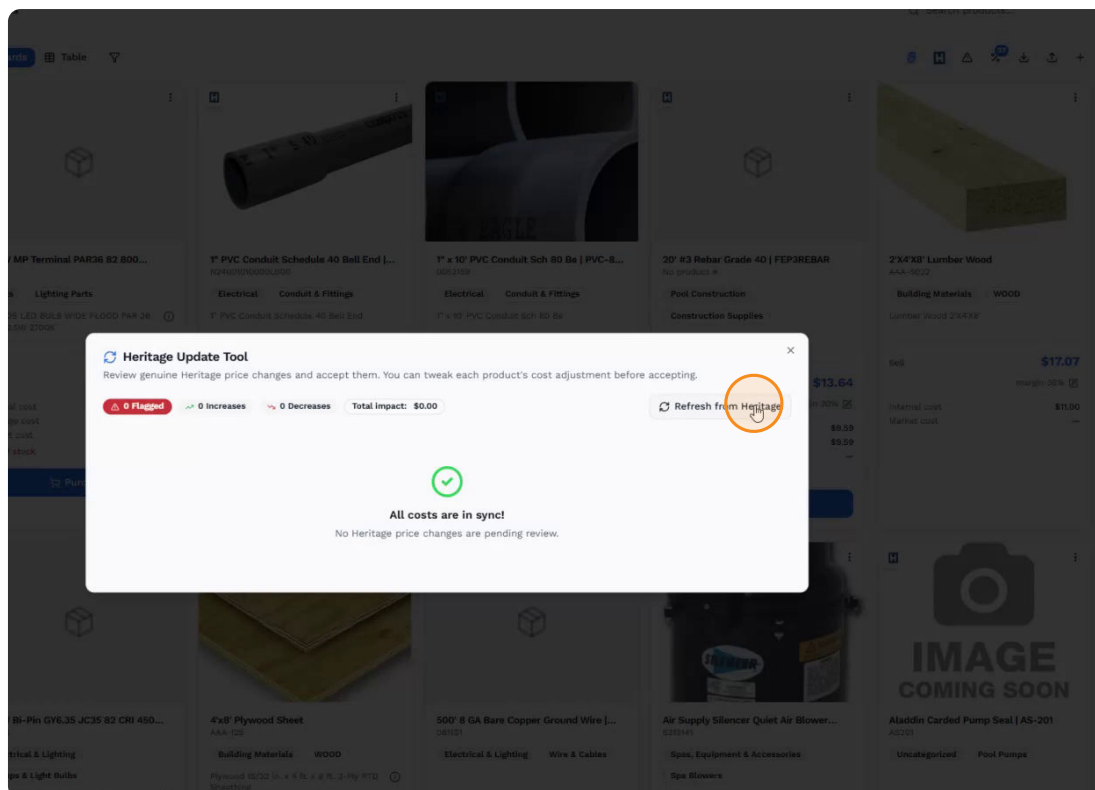


- A **red icon** on the cost check indicates you have **mismatched prices**.
- This means that, within the two-way connection with Heritage, Heritage's prices have changed and no longer match your BidBuild catalog.

You need to open the cost check tool



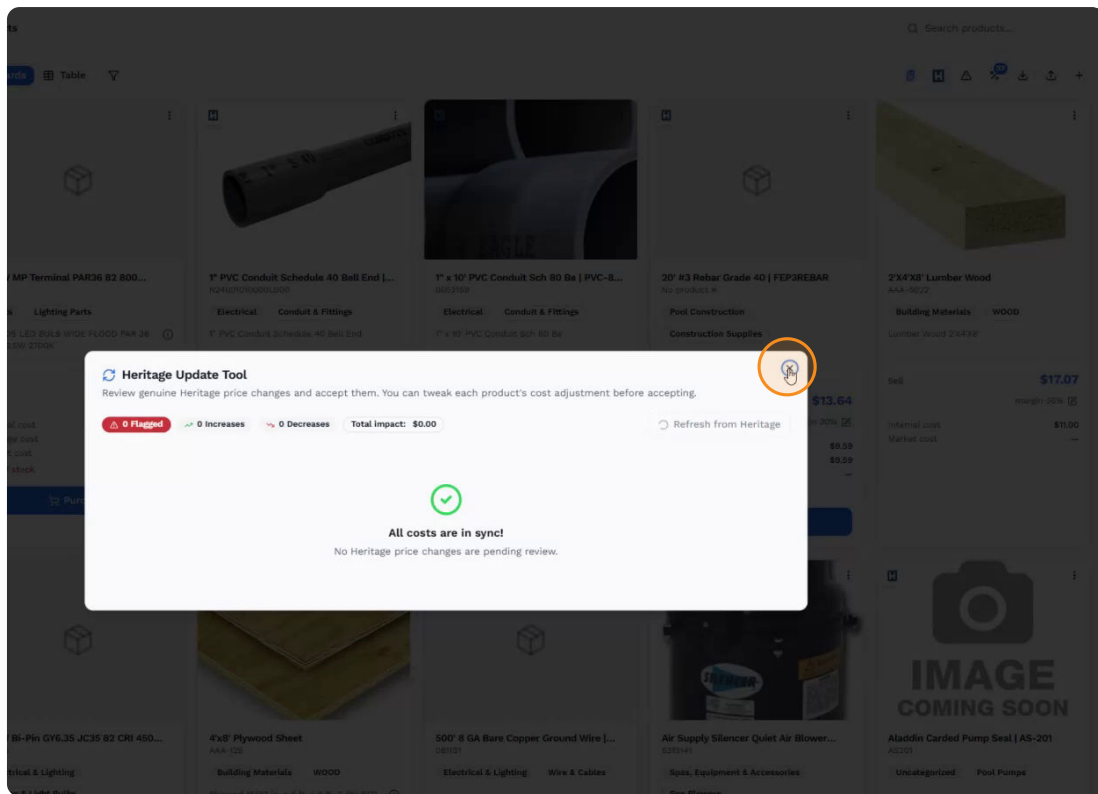
and readjust and reapply the updated prices to your current catalog settings.



You can also **refresh** at any time to check for new pricing.

Step 6: Import, Export, and Add Products from the Catalog

From this area, you can:



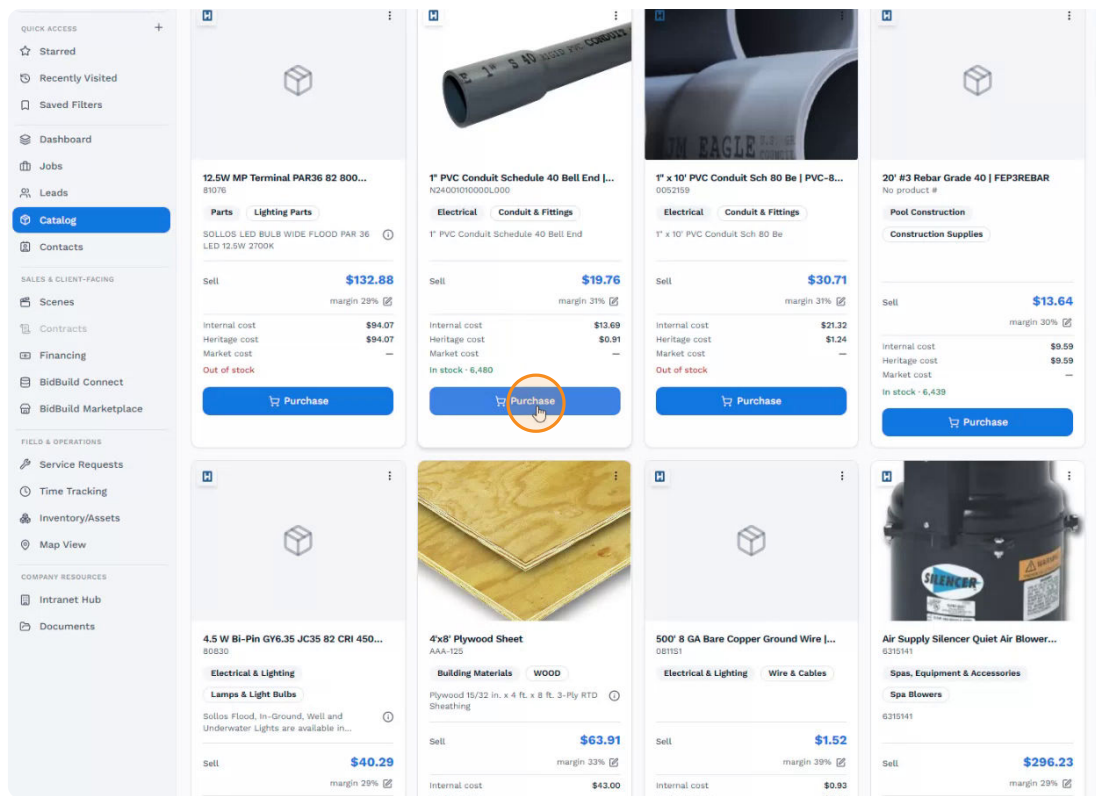
- **Import products** using a spreadsheet.
- **Export products** from the catalog.
- **Add new products** directly from here.

Some products display a **purchase icon**; others do not. Products with a purchase icon have a direct connection with one of BidBuild's partner integrations. In this example, the integration is Heritage, as indicated by the Heritage icon at the top.

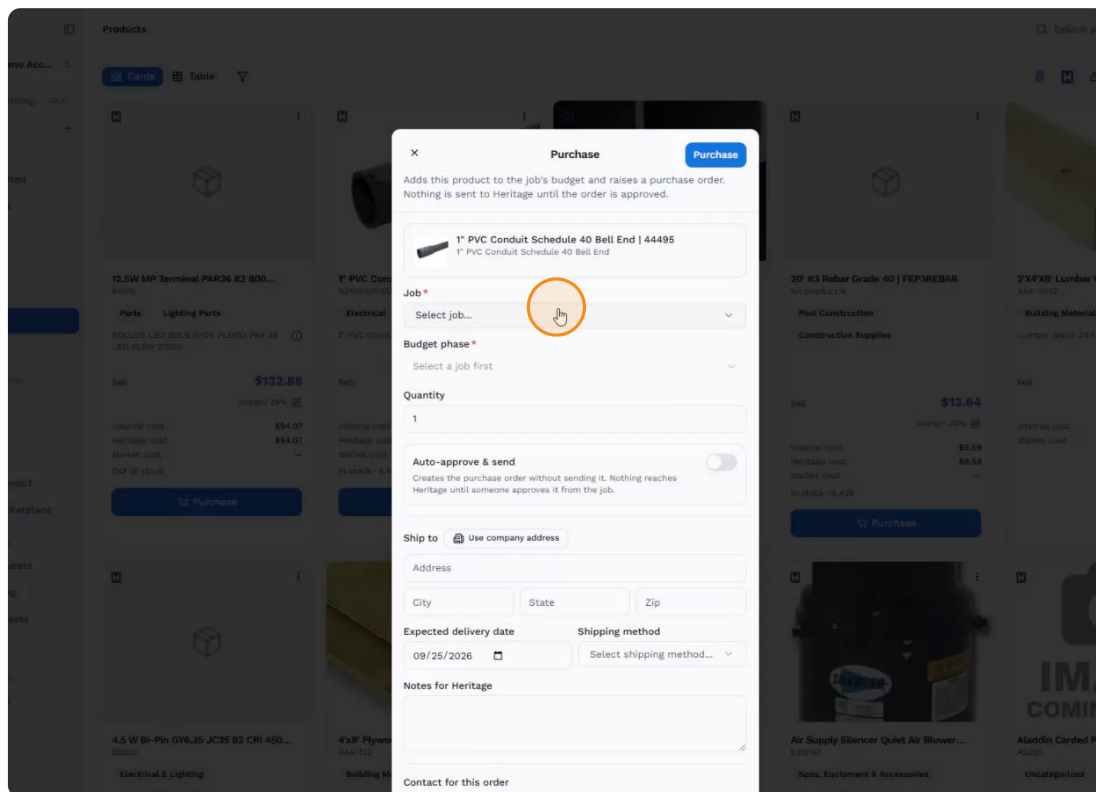
Step 7: Purchase Integrated Products Through a Job

For products with a purchase icon:

1. Select the **product item** you want to purchase.



2. Select the **job** you would like to purchase it through.



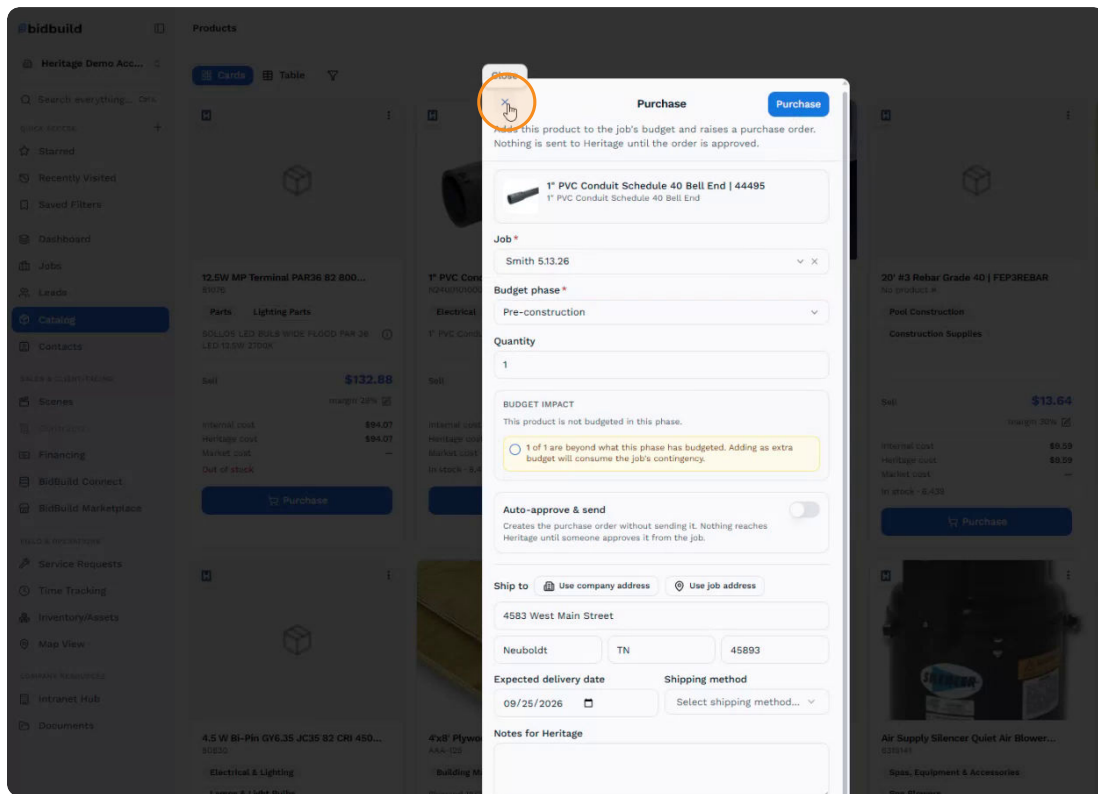
3. Choose which **budget** within that job you want to use.

4. Enter the **quantity**.

You can also:

- Enable **auto-approve**.
- Specify **shipping details** (where to ship the order).
- Add **notes for Heritage**.
- Enter **contact information**.

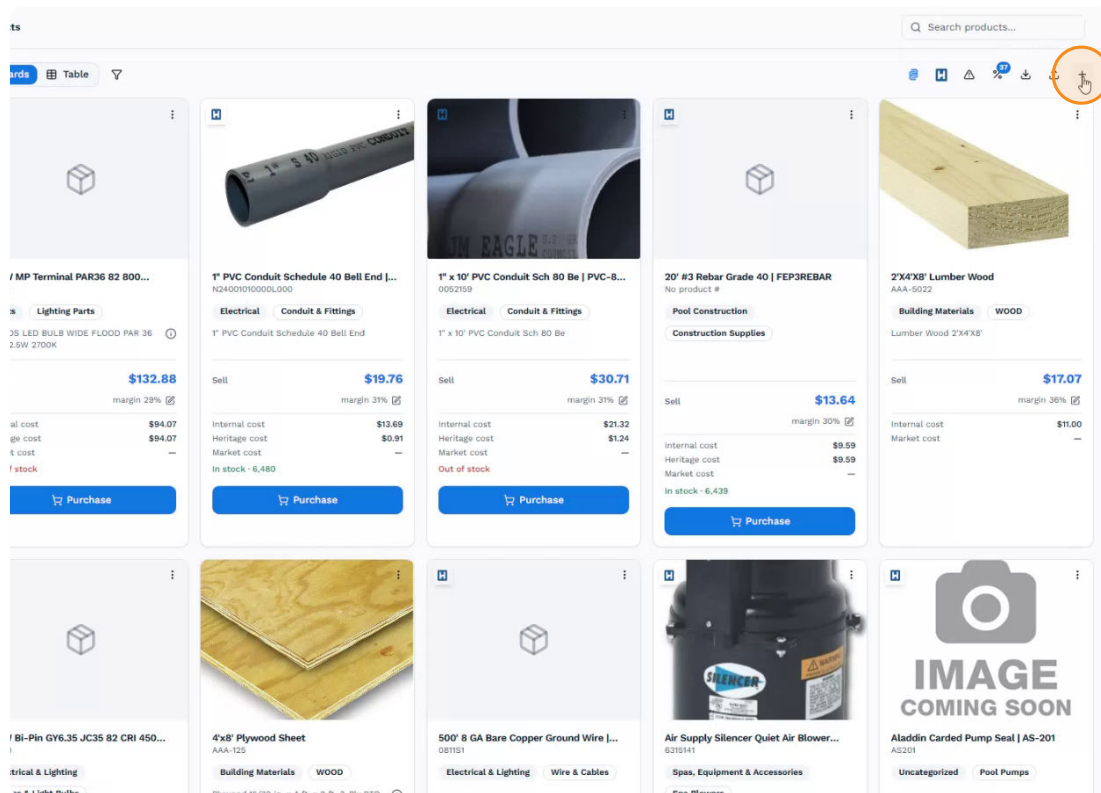
Finally, select **Purchase** to buy the product directly.



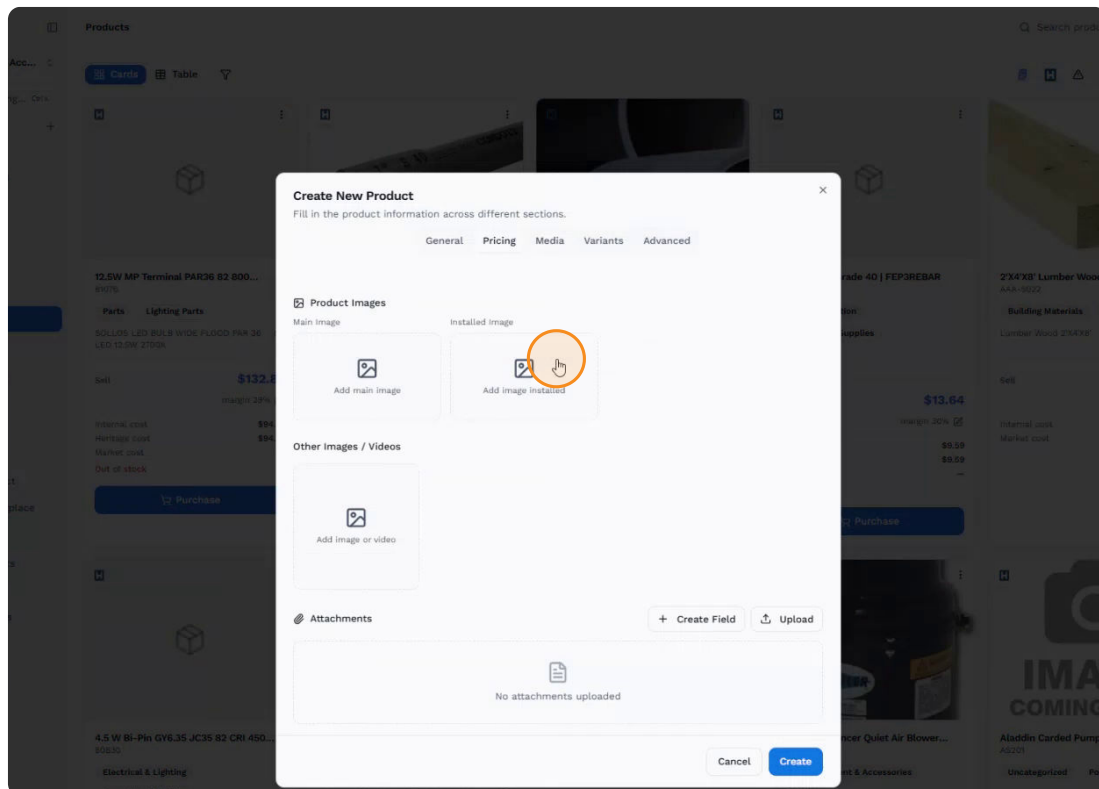
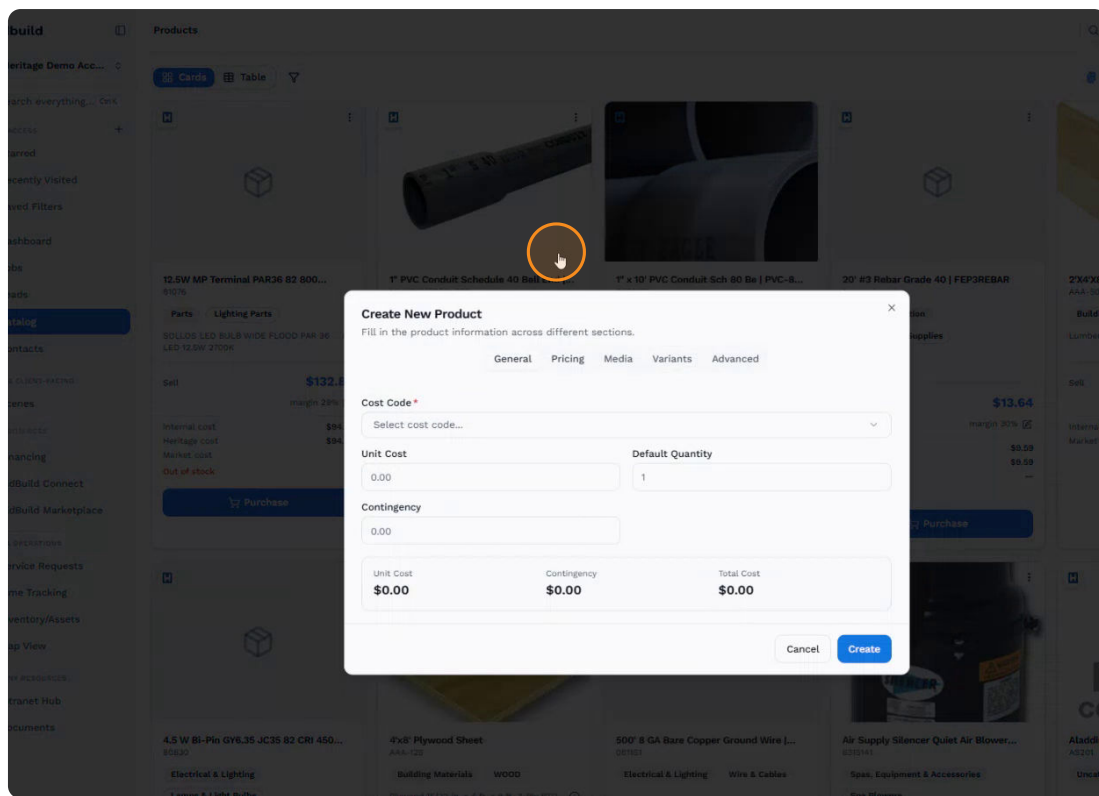
The order is then sent to Heritage. Heritage will accept and ship the order, bill it, and the bill will return to BidBuild, where it will appear ready to be placed into your **QuickBooks** account.

Step 8: Start Adding a New Product

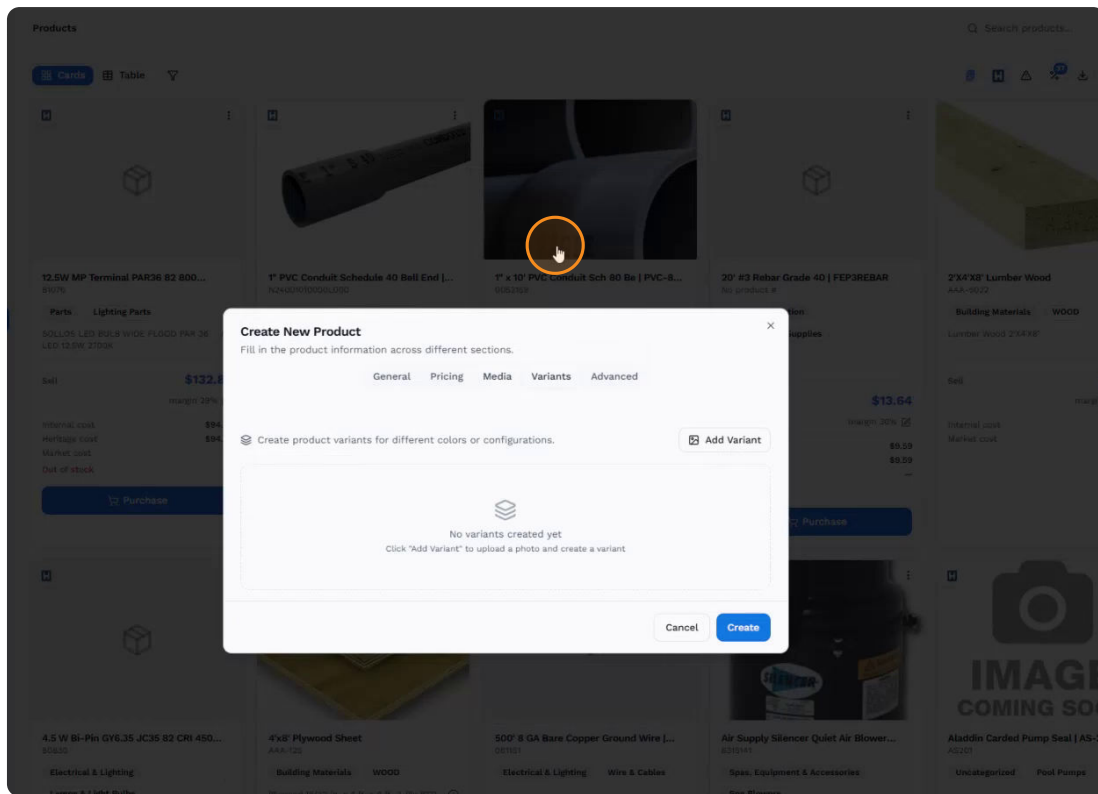
To add a new product, click the **New Product** icon.



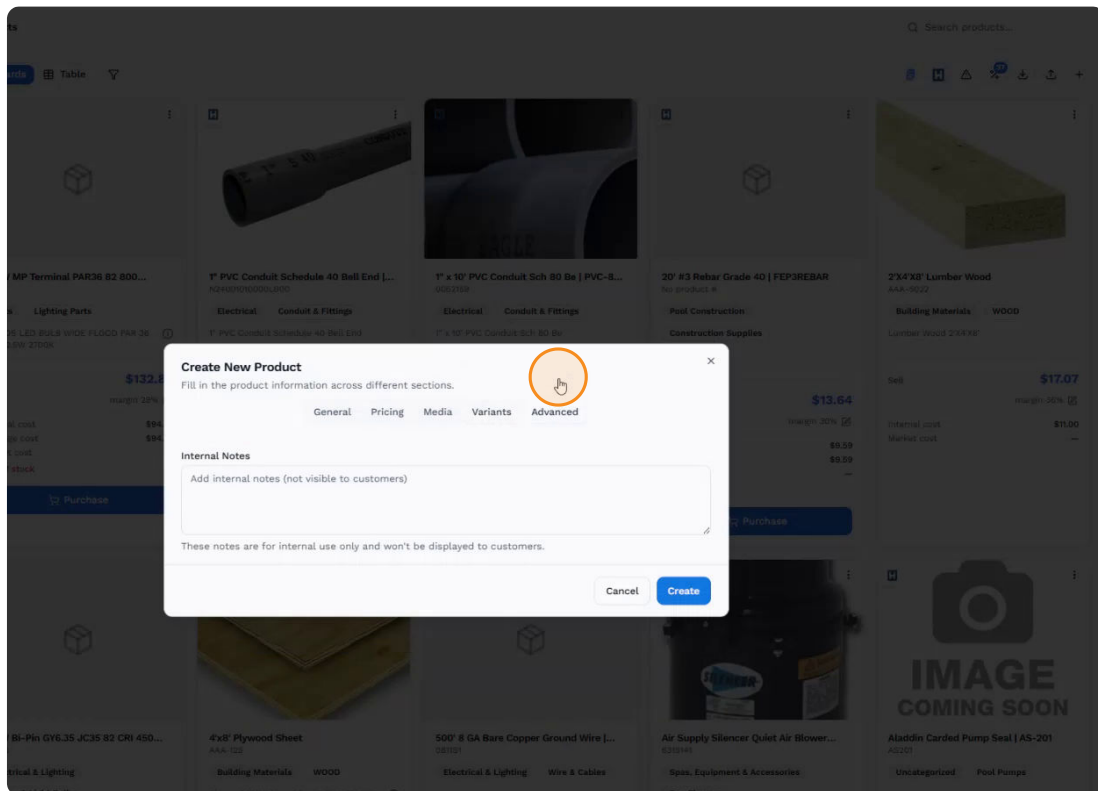
Inside the New Product screen, you will see multiple tabs:



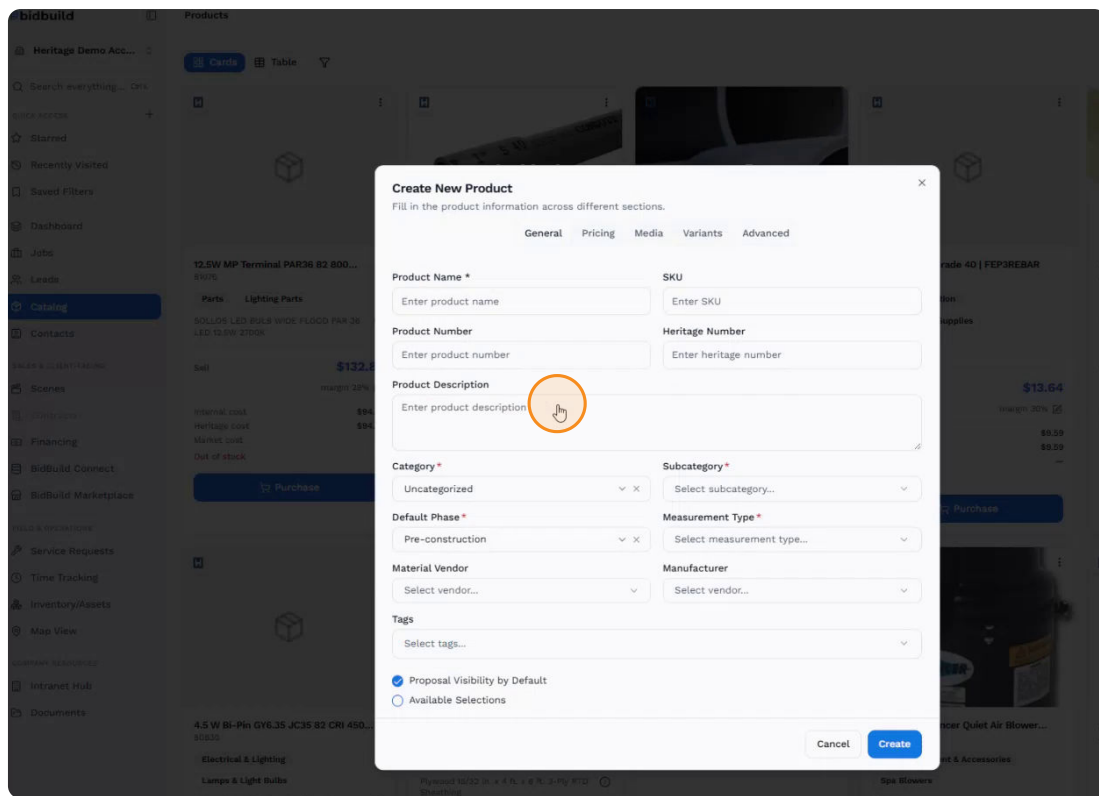
- General
- Pricing
- Media



- Variants



- Advanced



You will configure each of these sections to fully define the product.

Step 9: Configure General Product Information

In the **General** tab, enter:

- Product name
- SKU number
- Product number
- Specific Heritage number (if applicable)
- Product description

Then select:

- **Category**
- **Subcategory**
- **Phase of construction** the item is associated with
- **Measurement type**

Create New Product
Fill in the product information across different sections.

General Pricing Media Variants Advanced

Product Name * SKU
 Enter product name Enter SKU

Product Number Heritage Number
 Enter product number Enter heritage number

Product Description
 Enter product description

Category * Subcategory *
 Uncategorized Select subcategory...

Default Phase * Measurement Type *
 Pre-construction Select measurement type...

Material Vendor Manufacturer
 Select vendor... Select vendor...

Tags
 Select tags...

☒ Proposal Visibility by Default
☐ Available Selections

Cancel Create

- Material vendor

Create New Product
Fill in the product information across different sections.

General Pricing Media Variants Advanced

Product Name * SKU
 Enter product name Enter SKU

Product Number Heritage Number
 Enter product number Enter heritage number

Product Description
 Enter product description

Category * Subcategory *
 Uncategorized Select subcategory...

Default Phase * Measurement Type *
 Pre-construction Select measurement type...

Material Vendor Manufacturer
 Select vendor... Select vendor...

Tags
 Select tags...

☒ Proposal Visibility by Default
☐ Available Selections

Search measurement types...
 EACH (EA)
 BAG (BAG)
 BAND (BJ)
 BAND (BN)
 BIG BOX (BB)
 BOTTLE (BO)
 BOX (BX)

- Manufacturer

Create New Product

Fill in the product information across different sections.

General Pricing Media Variants Advanced

Product Name * SKU

Enter product name Enter SKU

Product Number Heritage Number

Enter product number Enter heritage number

Product Description

Enter product description

Category * Subcategory *

Uncategorized Select subcategory...

Default Phase * Measurement Type *

Pre-construction Select measurement type...

Material Vendor Manufacturer

Select vendor... Select vendor...

Tags

Select tags...

☒ Proposal Visibility by Default

☐ Available Selections

Cancel Create

- Any tags you use

Create New Product

Fill in the product information across different sections.

General Pricing Media Variants Advanced

Product Name * SKU

Enter product name Enter SKU

Product Number Heritage Number

Enter product number Enter heritage number

Product Description

Enter product description

Category * Subcategory *

Uncategorized Select subcategory...

Default Phase * Measurement Type *

Pre-construction Select measurement type...

Material Vendor Manufacturer

Select vendor... Select vendor...

Search vendors...

AQUASTAR POOL PRODUCTS

ARTISTIC PAVERS

BAYSIDE BUILDERS LLC

BELGARD PAVERS & HARDSCAPES

CMP

Default Manufacturer

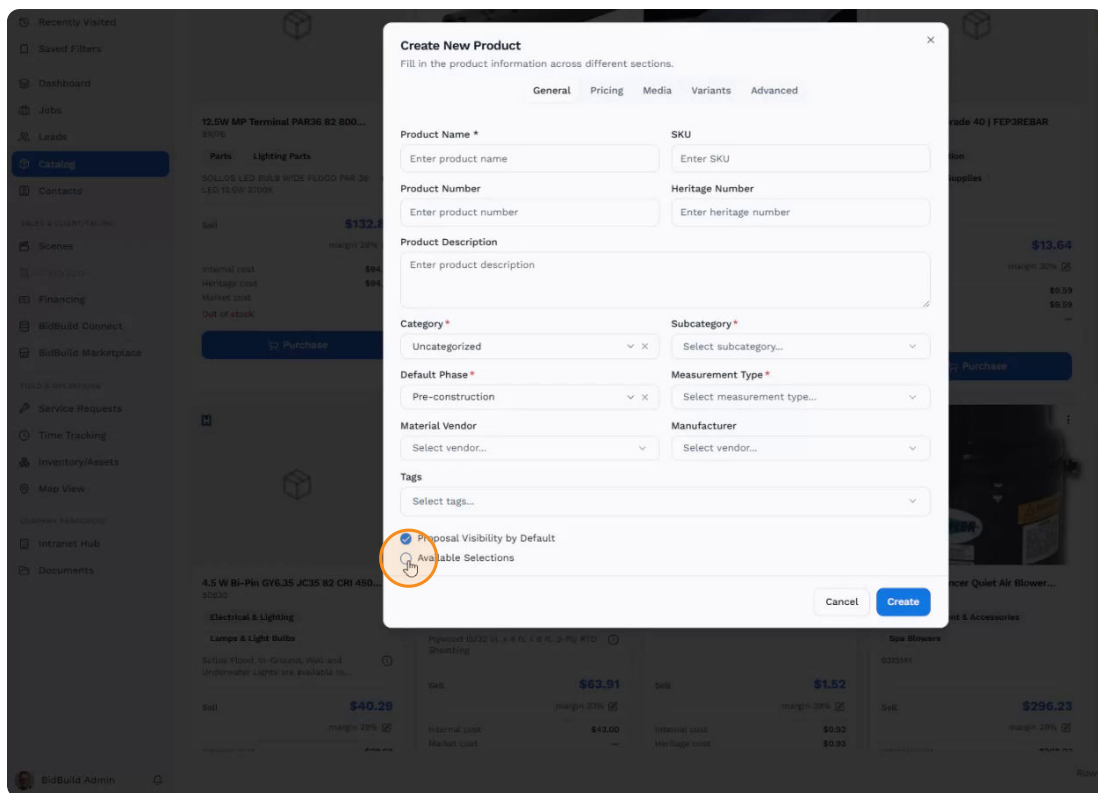
ENG PLANS LLC

Cancel Create

Set Proposal visibility:

- By default, the product is **shown** to the customer on proposals.
- You can choose to **hide** it if needed.

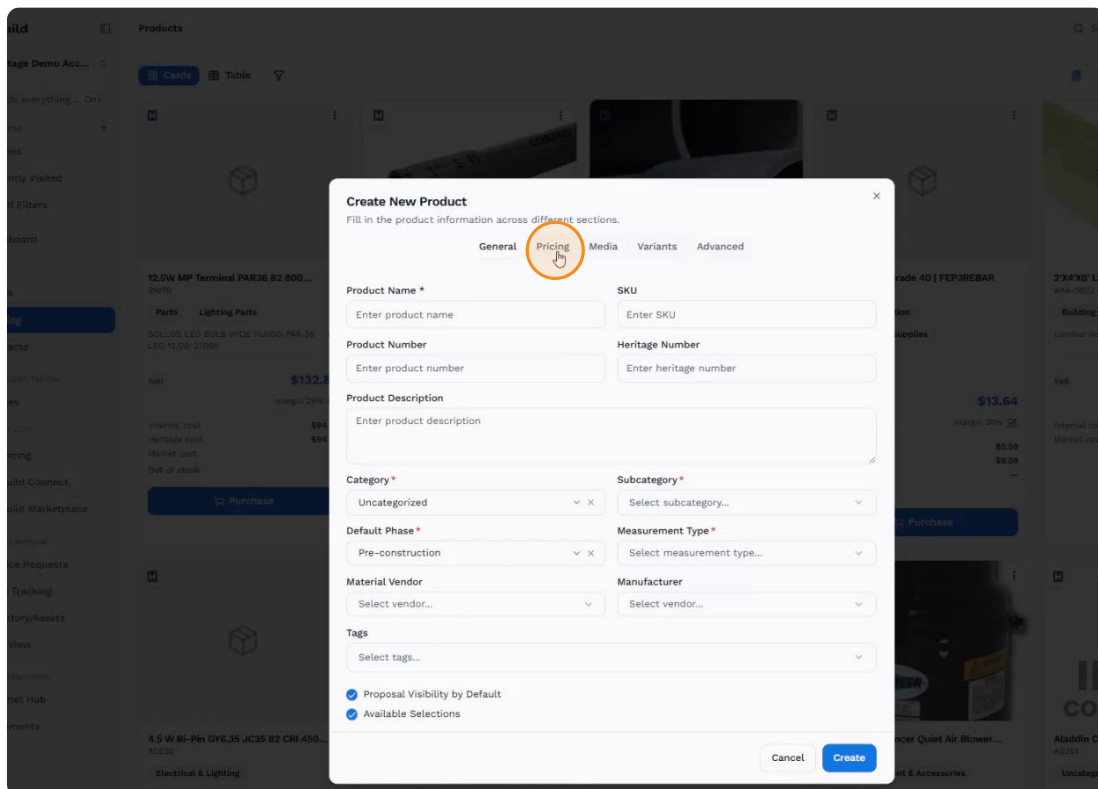
If there are **available selections** for this product,



select the option to indicate that selections are available.

Step 10: Define Pricing and Cost Codes

Go to the **Pricing** section.



- If you use **cost codes**, select the appropriate **cost code**.

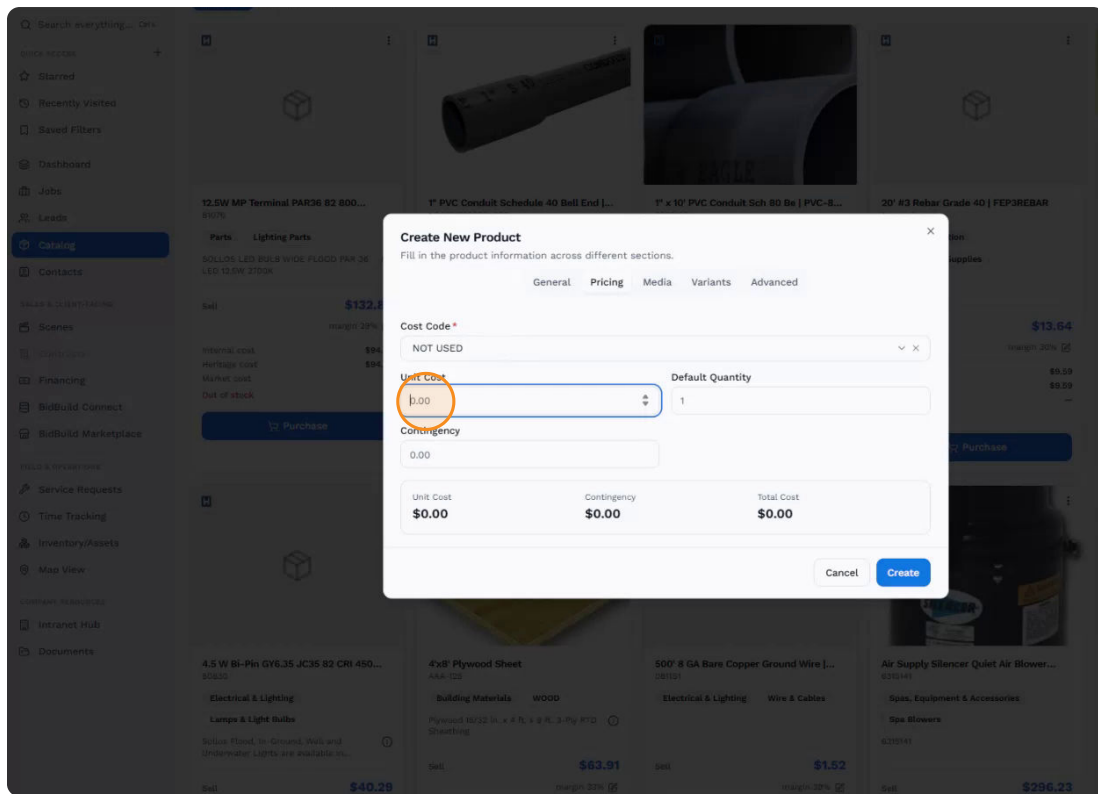
The screenshot shows the 'Create New Product' dialog box in a software application. The dialog has tabs for 'General', 'Pricing', 'Media', 'Variants', and 'Advanced'. The 'General' tab is active. In the 'Cost Code*' section, a dropdown menu is open, showing 'Select cost code...'. A hand cursor is pointing at the dropdown. Below this, there are input fields for 'Unit Cost' (0.00), 'Contingency' (0.00), and 'Default Quantity' (1). At the bottom, a summary table shows 'Unit Cost' as \$0.00, 'Contingency' as \$0.00, and 'Total Cost' as \$0.00. The background shows a grid of product cards with various items like '12.5W MP Terminal PAR36 82 500...', '1" PVC Conduit Schedule 40 Bell End...', and '4x8' Plywood Sheet'.

- If you do **not** use cost codes, select **Not Used**.

This screenshot shows the same 'Create New Product' dialog box, but the dropdown menu for 'Cost Code*' is expanded further. It now shows a search bar 'Search cost codes...' and a list of options. The option 'NOT USED' is highlighted with a hand cursor. The rest of the dialog, including the 'Unit Cost', 'Contingency', and 'Default Quantity' fields, and the summary table at the bottom, remains the same as in the previous image. The background product grid is also visible.

Cost codes are mappings to QuickBooks accounts that control where your **cost of goods** are posted.

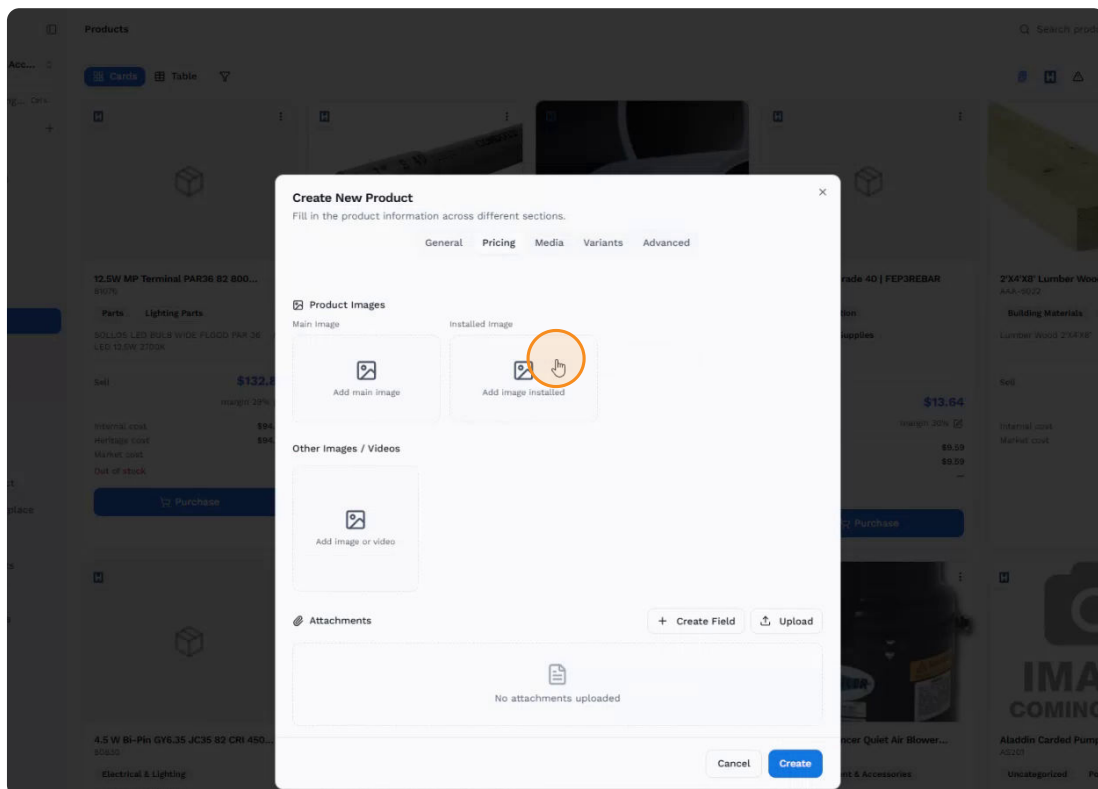
In this section, enter:



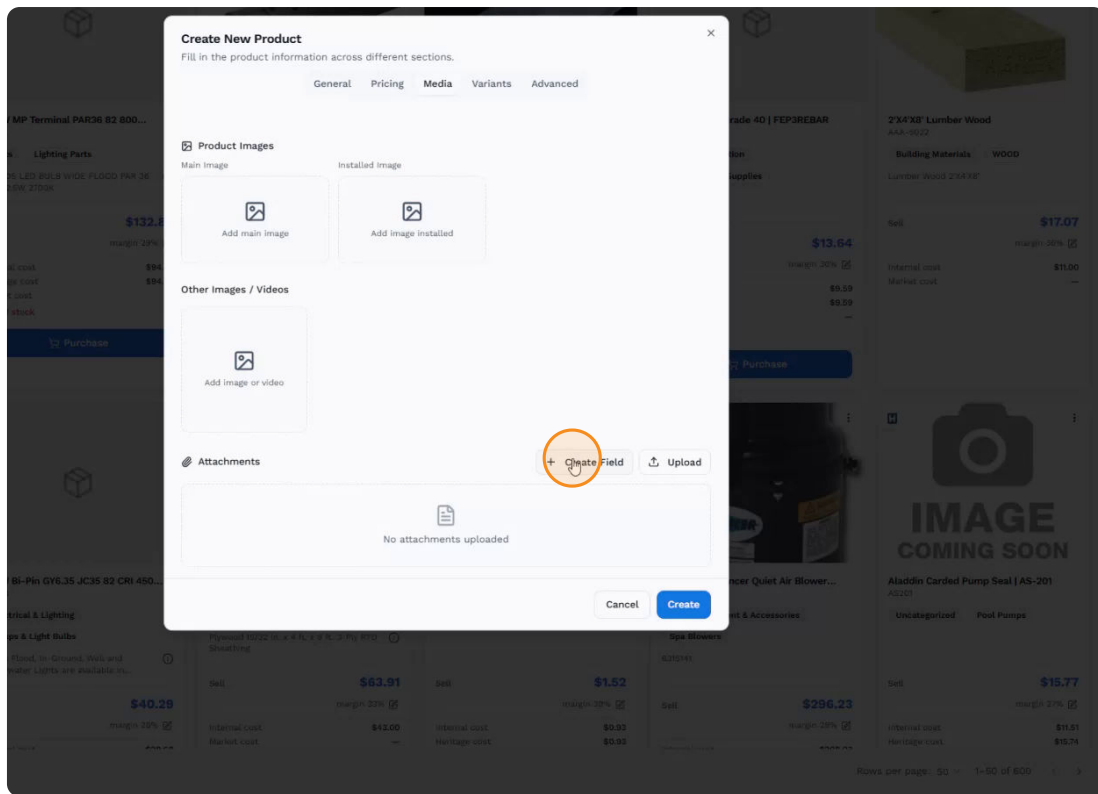
- Your **cost**
- The **default quantity** for that cost
- Any **overages or contingency** you want to add for the item

Step 11: Add Media and Attachments

In the **Media** section, add any relevant media or attachments for the product.

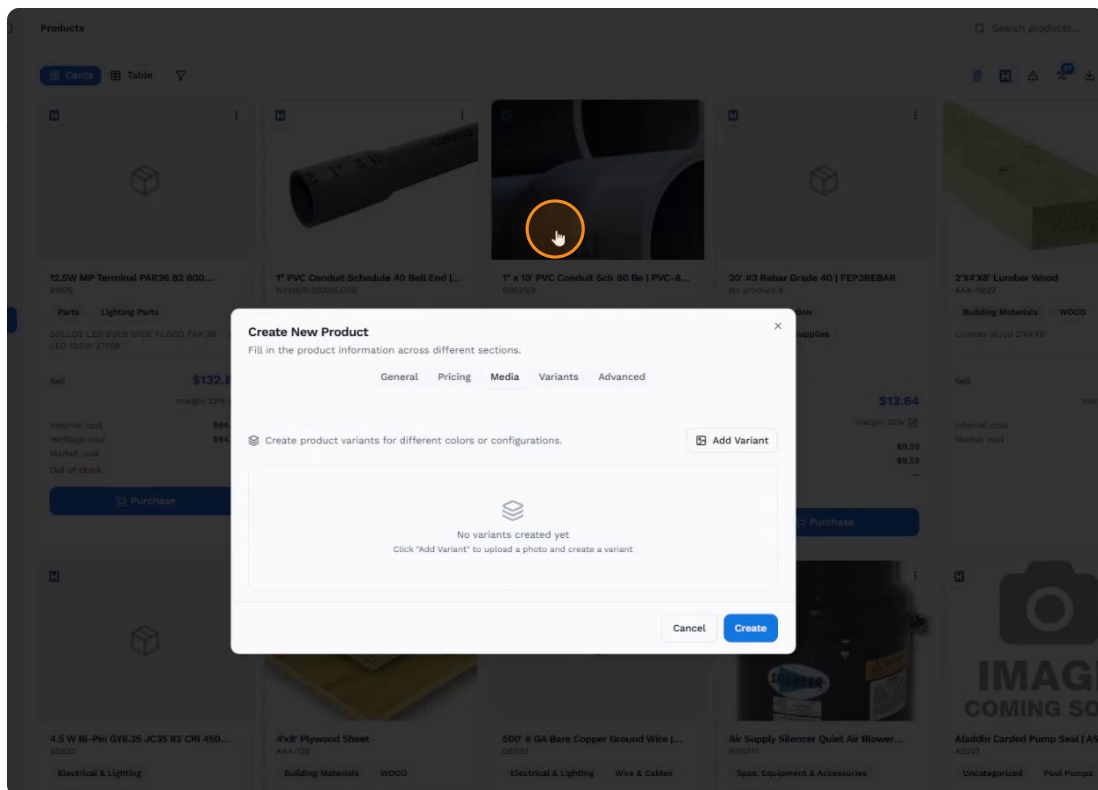


You can also **create fields** and name your **attachment types** to organize your files.

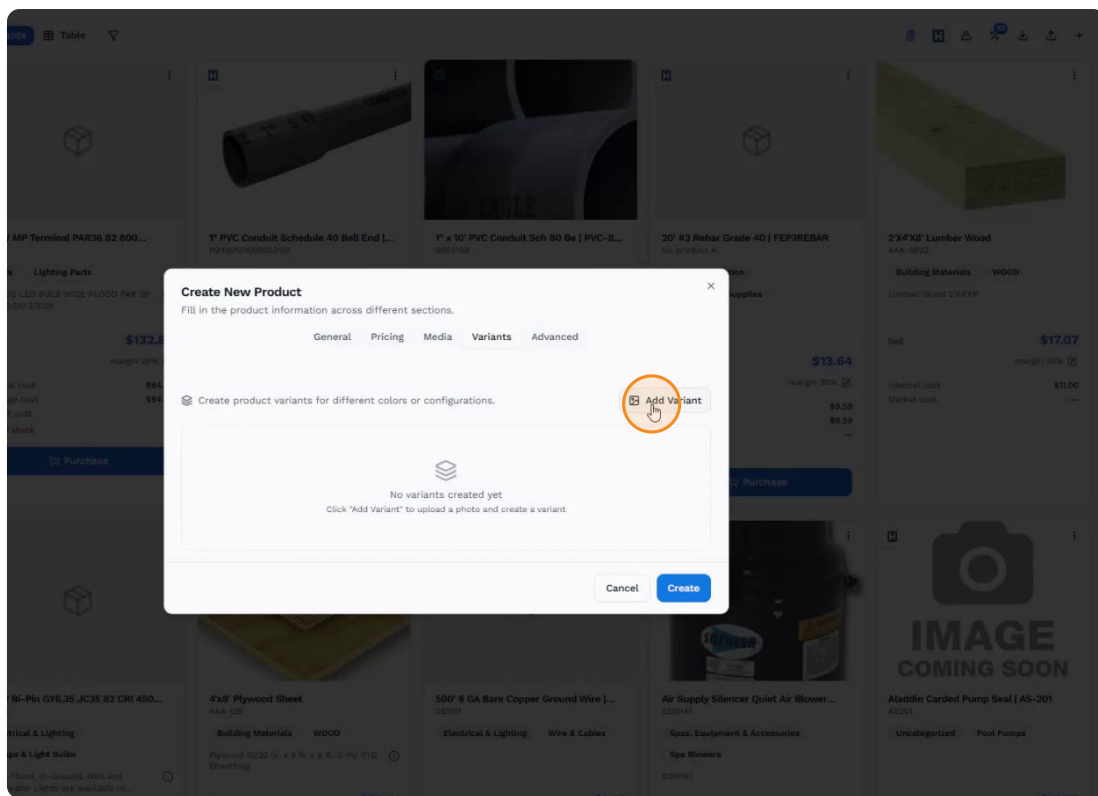


Step 12: Configure Product Variants

If the product has **selections** (such as different sizes, colors, or options), configure them in the **Variants** section.



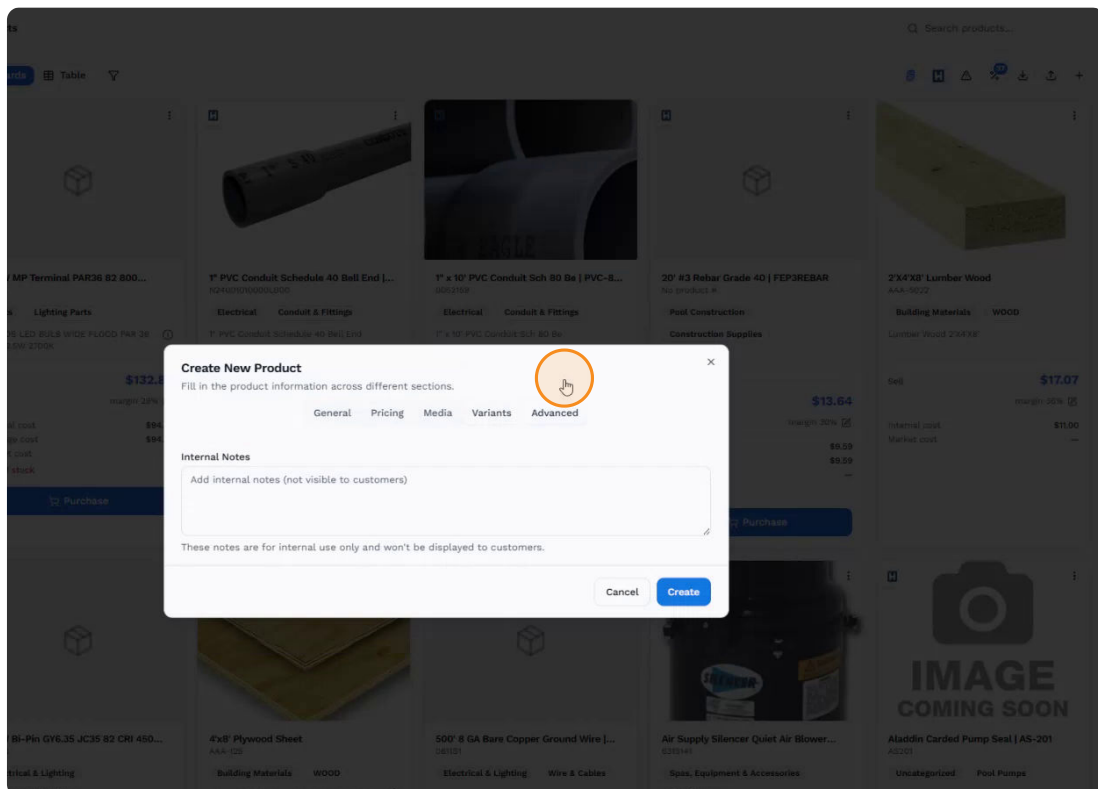
Click **Add a Variant**



and then upload or define those variants in the system.

Step 13: Add Internal Notes in Advanced

In the **Advanced** section, you can add **internal notes** on the product.



These notes are visible to users when they are quoting products; they can hover over the internal notes area to see any special requirements for the product.

Once you have completed all sections, your product setup in the catalog is complete.

Create New Product ✕

Fill in the product information across different sections.

General Pricing Media Variants **Advanced**

Internal Notes

Add internal notes (not visible to customers)

These notes are for internal use only and won't be displayed to customers.

Cancel Create

Background Product Listings:

- MP Terminal PAR36 82 800...**
 - Lighting Parts
 - LED BULK WIDE FLOOD PAR 36
 - Price: \$132.1
 - Margin: 23%
- 1" PVC Conduit Schedule 40 Ball End [...]**
 - Electrical Conduit & Fittings
 - Price: \$13.64
 - Margin: 20%
- 20' #3 Rebar Grade 40 | FEP3REBAR**
 - Pool Construction
 - Construction Supplies
 - Price: \$9.59
 - Margin: 20%
- 2"x4"x8' Lumber Wood**
 - Building Materials
 - WOOD
 - Price: \$17.07
 - Margin: 20%
- 8-Pin GY6.35 JC35 82 CRI 450...**
 - Light & Lighting
 - LED, in Ground, Wet and
 - Water Lights are available too
 - Price: \$40.29
 - Margin: 20%
- 4"x8' Plywood Sheet**
 - Building Materials
 - WOOD
 - Price: \$63.91
 - Margin: 20%
- 500' 8 GA Bare Copper Ground Wire [...]**
 - Electrical & Lighting
 - Wire & Cables
 - Price: \$1.52
 - Margin: 20%
- Air Supply Silencer Quiet Air Blower...**
 - Spas, Equipment & Accessories
 - Spa Blowers
 - Price: \$296.23
 - Margin: 20%
- Aladdin Carded Pump Seal | AS-201**
 - Uncategorized
 - Pool Pumps
 - Price: \$15.77
 - Margin: 20%

Rows per page: 30 1-50 of 800