



Educational Course Catalog



11305 Rancho Bernardo Road, Suite 116, San Diego, CA 92127
800.400.4927 - www.Pacific-Solutions.com

Welcome

Welcome to Pacific Solutions' department of education! We believe every Pacific Solutions client should have the best training available. We combine several methods and approaches to learning to accommodate all learning styles. We take pride in offering hands on training directly with the software.

One of your greatest assets is your employees. The knowledge they carry should be up to date providing them fluid and effective system usage. Whether it's starting a new hire off on the right path, or keeping your staff informed about system enhancements giving your team certified training is sure to reveal the full power of your management and estimating tools.

We offer creative ways to participate in ongoing education. Join us in a training session today!

eLearning

eLearning (electronic learning) is conducted via the Internet. This is an excellent way to get up to speed on new system enhancements, expand your knowledge base and learn best system practices. eLearning is offered through several means; one-on-one online education, online lecture education with multiple attendees; and video tutorials available throughout the management system. eLearning is a wonderful resource for ongoing education. Users can schedule eLearning in blocks of time; move themselves toward practice with new knowledge; further their internal education; and participate in follow up eLearning education. The sessions are topic specific which means users do not have to sit through procedures that are already familiar. eLearning eliminates travel expenses normally associated with traditional educational environments.

Lecture Presentation

This learning style utilizes a lecture format with type-in interaction with the instructor. This eLearning is topic specific allowing instruction for larger groups and lowering instructional costs through sharing. The topic specific session demonstrates procedure and moves through the subject material in the proper sequence. Attendees submit subject related question throughout the session by typing into the appropriate communication area on the screen. Questions pertaining to the subject matter are answered within the remaining minutes of the session.

1 to 1 Consulting

When users have individual needs that surpass the collective environment; One to one consulting gives users personalized attention on the things that matter most. Our trainer will conduct an online session on a pre-determined agenda for discussion. This allows more time for questions, detailed answers and scenario driven resolutions. The benefits to this type of education is the ability to tailor it to each company's specific needs and participants are not sharing time with other attendees in large group.

Video Tutorials

Topic specific videos are available as a direct link throughout multiple areas of the software. This allows the user to have 24/7 access for system help. Simply click the **Web Help** button located in most areas of the software to see the available videos for that section. Since videos frequently change to remain compliant with the software, access is granted only to those users current with the system updates and maintenance contracts.

We appreciate your questions and comments. Please contact me directly at bonni@pacific-solutions.com .

Thank you,

Bonni Georgi

Director of Education

Pacific Solutions

To schedule training, please submit the training request form at

http://www.pacific-solutions.com/downloads/pdf/Course_Registration_Form.pdf

Please note: Current course offerings are on our website at www.pacific-solutions.com/education. This publication may be modified or discontinued without notice.

© Copyright Pacific Solutions, 1997-2008. All rights reserved

Course Information

Courses are offered in the following skill levels:

100 Levels

Basic skills understood in MS Windows and common computer operation. These classes are excellent refresher courses for your staff as they will include new basic features upon release. These classes are a benefit to anyone just beginning the learning process.

200 Levels

Intermediate skills in our offered programs are understood and currently practiced in a live environment. These classes are designed to broaden your understanding of program capabilities and processes.

300 Levels

Advanced skills in our offered programs are understood and currently practiced in a live environment. These classes are designed to open your knowledge to the powerful tools and flexibility of our programs and processes.

400 Levels

Expert skills in our offered programs are required. These classes are highly recommended for your internal corporate training personnel.

Course Suffix Legend

The following is a chart of the course prefix. For example: **FM** 100

| | | | | | |
|-------------------------------|--------------------------|-----------------------|----------------------------------|-------------------|-----------------------------|
| FM & JR General courses | FloorManager Specific | JobRunner Specific | FloorRight General courses | FR Pro Courses | FR Commercial courses |
| PS | FM | JR | FR | FP | FC |

WFCA Credits

All Pacific Solutions' courses are approved by the World Floor Covering Association for credit. Individuals are responsible for attaining credit with the WFCA in line with their requirements. Visit www.wfca.org for more details.

Please contact our education department for scheduling online, on-site and classroom training events.

General

FM 100 Introduction to FloorManager

Refresh your memory or introduce new employees to the flow of FloorManager! This class is designed to illustrate the flow and general concepts in our FloorManager system.

By the end of this class you will have learned the following:

- General overview of operating FloorManager
- General overview of information flow in FloorManager

JR 100 Introduction to JobRunner

Refresh your memory or introduce new employees to the flow of JobRunner! This class is designed to illustrate the flow and general concepts in our JobRunner system.

By the end of this class you will have learned the following:

- General overview of operating JobRunner
- General overview of information flow in JobRunner

PS 218 Navigation & Keystroke Tricks

Make your navigational experience one to remember! This class is designed to give you tricks and tips into the world of shortcuts and navigational hints.

By the end of this class you will have learned the following:

- General navigational tips
- Inventory search short cuts
- Performing wild card searches
- Extra finds & requests

PS 219 Supported Transitional Posting Routines

Learn the properly supported procedure to transitioning your old system information! This class is designed to teach you the proper method to posting your transitional data from your old system into your new Pacific Solutions management system.

By the end of this class you will have learned the following:

- Which g/l accounts to create for transitional data
- How to bring over a trial balance
- How to determine what information need to transition
- The procedures for posting transitional activity during cross over

PS 220 Transitional Bank Reconciliation

Learn the process behind reconciling the bank statement during cross over! This class is designed to give you the background processes to reconciling the bank statement across your old system and your new Pacific Solutions system.

By the end of this class you will have learned the following:

- Bank reconciliation theory
- Bank reconciliation process
- Determining the ending balance per system

FM 300 New Features FloorManager

New FloorManager release update! This class is designed to educate you on the brand new features available in FloorManager.

By the end of this class you will have learned the following:

- Familiarized yourself with the newly released key features in FloorManager

JR 300 New Features JobRunner

New JobRunner release update! This class is designed to educate you on the brand new features available in JobRunner.

By the end of this class you will have learned the following:

- Familiarized yourself with the newly released key features in JobRunner

Measuring / FloorRight

FR 100 Basics of FloorRight

Become familiar with the basics of FloorRight! This class is designed to introduce you to the capabilities of FloorRight and covers why FloorRight is a good fit for your company.

By the end of this class you will have learned the following:

- Overview of FloorRight Commercial & Professional
- Review examples of key features
- Why FloorRight is a good fit for your company

FR 102 Basics of SiteDraw Pocket PC

Learn the basics of SiteDraw using the Hewlett Packard Pocket PC! This class is designed as a beginner's instruction to the operation of SiteDraw.

By the end of this class you will have learned the following:

- Drawing rectangular, curved and angled rooms
- Placement of doors
- Color coding, naming and voice annotation of rooms
- Saving and exporting files

FR 104 Job Estimate Building

Make estimating blue prints easier or train new employees in FloorRight! This class is designed to pave the way for a proper understanding of job estimating with FloorRight.

By the end of this class you will have learned the following:

- Building a material catalog
- Assigning product to job estimate items
- Assigning tags to products
- Creating multiple products in the same room
- Printing formats and set up

FR 103 Basics of 3D

Create visuals for 3D spaces including shower areas! This class is designed to introduce you to the basic function of the 3D feature in FloorRight.

By the end of this class you will have learned the following:

- The functions of the toolbars
- How to create tags
- Importing and modifying basic rooms
- The 3D library

FR 200 Electronic Files

Use FloorRight without paper prints! This class is designed to make estimating even easier by scaling electronic files without paper prints.

By the end of this class you will have learned the following:

- How to import and export electronic files
- Scaling electronic files
- Working with PDF, Bitmap, Jpeg, Tiff images & more
- The relationship of files with SiteDraw

FR 201 Management Integration

The most powerful combination a business can have! This class is designed to unleash the power of FloorRight and Pacific Solutions' management systems by integrating the communication of product catalog and estimate quantities.

By the end of this class you will have learned the following:

- Communicating FloorRight estimate information with JobRunner & FloorManager
- Communicating JobRunner & FloorManager product catalog with FloorRight
- Integrating FloorManager & JobRunner customer information with FloorRight job information
- Creating a Quote in FloorManager & JobRunner with job estimate information from FloorRight

FR 202 Roll Allocation

Easily manage material allocation and dye lot assignment! This class is designed to make assigning material information and viewing stock information easier.

By the end of this class you will have learned the following:

- Allocating roll material information to specific rooms
- Assigning dye lot information to specific rooms
- Analyze material information in the stock view

FR 203 Generating Reports

Get more out of FloorRight Commercial! This class is designed to maximize the power of FloorRight Commercial through report generation.

By the end of this class you will have learned the following:

- How to generate reports
- Accessing the proper report to get more information

FR 204 Digitizer Shortcuts & Setting Defaults

Control FloorRight to perform the way YOU want! This class is designed to minimize the learning curve and put you in control of how FloorRight performs.

By the end of this class you will have learned the following:

- Setting general defaults for drawing & layout creation
- Correlating points / fixed & manual scales / Digitizer shortcuts
- Features of the defaults/options box

FR 205 Tile Patterns In 2D

Visualize tile patterns in two dimensional views! This class is designed to differentiate tile product rooms from other product rooms.

By the end of this class you will have learned the following:

- How to access the tile pattern feature
- Create symmetrical tile patterns
- Create symmetrical tile patterns

FR 206 Tool Bar Features – Advanced

What are all these buttons for on the tool bar? This class is designed to dive deeper into FloorRight's tool bar button functions.

By the end of this class you will have learned the following:

- Explanations of multiple tool bar buttons
- Positioning patterned carpet relative to doors and/or walls
- Voice annotations
- Advanced tool bar button features

Order Creation

PS 105 Job Mail Message Center

Keep all your job correspondence in one place! This class is designed to give you easier access to job correspondence and manage job details all within job mail.

By the end of this class you will have learned the following:

- What is Job Mail?
- How to attach a correspondence to a job through job mail
- How to read and document a response to job mail
- How to document a general job mail message
- How to document and send a response through job mail
- Printing Job Mail : All vs. Specific categories

PS 107 Remote Bidding

Close jobs out in the field! This class is designed to give you an edge on winning jobs in the field.

By the end of this class you will have learned the following:

- Areas of the system usable remotely in the field
- Equipment requirements for remote bidding
- How to synchronize information remotely

FM 200 Forms FloorManager

Standardized forms are available in FloorManager! This class is designed to familiarize you with key auto created forms now available in FloorManager.

By the end of this class you will have learned the following:

- Locating & creating forms
- Filling in pertinent data within key forms
- How to utilize a form template
- Attaching forms to sales agreements

JR 200 Forms JobRunner

Standardized forms are available in JobRunner! This class is designed to familiarize you with key auto created forms now available in JobRunner.

By the end of this class you will have learned the following:

- Locating & creating forms
- Filling in pertinent data within key forms (AIA Documents)
- How to utilize a form template
- Attaching forms to an order

JR 201 Change Order Management

Manage your change orders more effectively and review whole project margins from one screen! This class is designed to explain the change order process and how to manage change orders and credits through the primary job and project number.

By the end of this class you will have learned the following:

- Creating a change order
- Creating a credit
- Pending vs. Accepted change orders
- Projects Tab to view overall GPM on entire project
- Project number vs. Job number
- Change orders in conjunction with work orders
- Viewing accepted change orders on the change order tab

PS 204 Introduction to Kit Building

Help your staff to remember the little things! This class is designed to make quote building a faster, more effective tool to remembering the peripheral materials and presenting subtotal descriptions to clients.

By the end of this class you will have learned the following:

- Building a Kit in the Product catalog
- Using the Product Kit in a quote
- Building a Generic Quote, Sales Agreement or Invoice using the Kit feature

PS 300 Templates Basics

Work with proposals and quotes quickly and efficiently for builders and insurance jobs! This class is designed to give you quick ways to work with the quoting and proposal process while maintaining standards for builders and insurance jobs.

By the end of this class you will have learned the following:

- The basics of the status “template”
- The template button & its functions
- Setting standards & using the upgrade tab
- Creating a range in standards

Copying a template for multiple bid procedures

PS 301 Templates Advanced

Advance your skills in templates! This class is designed to round out your skills in working with templates and the split billing process.

By the end of this class you will have learned the following:

- Switch allotment procedures in the standards area
- Using builder allowances
- Processing insurance deductibles

Split bill the invoice between primary & secondary customers

Scheduling

JR 102 Labor Matrix

Distribute multiple laborers' wages and burdens across installer work orders! This class is designed to cover job costing multiple laborers across single phase work orders.

By the end of this class you will have learned the following:

- How to set up the labor matrix wages and burden costs
- How to identify labor matrix categories to each laborer
- Adding labor matrix costs to an installer work order

Distributing labor matrix wages and burdens across work orders

PS 103 Scheduling

Gain more control over your installation and measurement schedules! This class is designed to maximize your navigation and use of the work order calendar and the request measurement calendar.

By the end of this class you will have learned the following:

- Scheduling work orders & measures on the calendars
- Modifying scheduled jobs & measures on the calendar
- Finding Scheduled installs or measures
- Arranging the columns in daily view & print view
- Printing the Schedules

PS 104 Multiple Installer Rates

Keep your multiple installer job costing accurate and more efficient through the labor catalog! This class is designed to give you easier access to your individual installers' pricing agreements and job cost them effectively on the work order.

By the end of this class you will have learned the following:

- How to set up multiple installer rates per labor type category
- The difference between house Rates & Installer Rates
- How to use them on Work Orders
- How this affects the Sales Agreement & job costing

Product & Labor Catalog

PS 104 Multiple Installer Rates

Keep your multiple installer job costing accurate and more efficient through the labor catalog! This class is designed to give you easier access to your individual installers' pricing agreements and job cost them effectively on the work order.

By the end of this class you will have learned the following:

- How to set up multiple installer rates per labor type category
- The difference between house Rates & Installer Rates
- How to use them on Work Orders
- How this affects the Sales Agreement & job costing

PS 106 Labels and Scanners

Create quick sales quicker and manage your sample checkouts with barcode scanning! This class is designed around showroom management for quickly checking out and in samples as well as creating cash sales through quick sale.

By the end of this class you will have learned the following:

- Trigger Scanner set up (USB)
- Marrying UPC barcodes to product ID numbers in product catalog
- Using the trigger scanner for quick sales
- Printing barcode product labels from the product catalog
- Using the trigger scanner for sample check out/check in
- Printing barcode inventory labels
- Using the trigger scanner with inventory barcode label for quick sales

PS 200 Revising Product Catalog

Let the product catalog work for you and make large category revisions with ease! This class is designed to maximize your product catalog experience with large data revisions and stock inventory communication.

By the end of this class you will have learned the following:

- Using & modifying cut & roll prices
- Putting products on sale
- Setting peak & reorder levels
- Disabling PO creation for stock items (stock Pos can still be created)
- Inventory to order report
- Making changes

PS 204 Introduction to Kit Building

Help your staff to remember the little things! This class is designed to make quote building a faster, more effective tool to remembering the peripheral materials and presenting subtotal descriptions to clients.

By the end of this class you will have learned the following:

- Building a Kit in the Product catalog
- Using the Product Kit in a quote
- Building a Generic Quote, Sales Agreement or Invoice using the Kit feature

eCommerce

PS 202 Spreadsheet Imports

Electronically import your non-B2B vendor pricing into the product catalog! This class is designed to help you understand the spreadsheet import/export process and give you helpful tools to manipulate the data before bringing it into the product catalog.

By the end of this class you will have learned the following:

- The import spreadsheet templates
- Using the spreadsheet import templates
- Importing the spreadsheet data into the bridge file
- Using the spreadsheet import routine to substitute information on the spreadsheet
- Correcting/deleting information on the import spreadsheet
- Exporting the spreadsheet data from the bridge file into the product catalog

PS 203 Basics of B2B

Accurate pricing instantly with Business to Business technology! This class is designed to introduce you to the basics of B2B technology within the system.

By the end of this class you will have learned the following:

- How to initiate the B2B download
- How to work with the bridge file & review the download information
- How to match downloaded products with existing product catalog data
- How to import the B2B download into the product catalog

Inventory

PS 209 Using Pocket PC & Socket Scanner

Cycle count and adjust inventory with ease! This class is designed to maximize your time in the warehouse by scanning inventory and electronically making cycle count adjustments.

By the end of this class you will have learned the following:

- Docking the pocket pc & Exporting inventory
- Scanning inventory tags and adjusting inventory counts
- Importing inventory & reviewing the adjustments

Processing the inventory adjustments

PS 217 Adjusting Inventory

Keep your inventory clear of fractional units of measure! This class is designed to save time in the warehouse during cycle counts by clearing overages and backorder quantities to the appropriate jobs and/or purging.

By the end of this class you will have learned the following:

- Clearing a backorder & an overage to jobs
- Adjusting inventory costs & quantities
- Purging inventory quantities
- Modifying the inventory record information

Showroom Management

PS 105 Job Mail Message Center

Keep all your job correspondence in one place! This class is designed to give you easier access to job correspondence and manage job details all within job mail.

By the end of this class you will have learned the following:

- What is Job Mail?
- How to attach a correspondence to a job through job mail
- How to read and document a response to job mail
- How to document a general job mail message
- How to document and send a response through job mail
- Printing Job Mail : All vs. Specific categories

PS 106 Labels and Scanners

Create quick sales quicker and manage your sample checkouts with barcode scanning! This class is designed around showroom management for quickly checking out and in samples as well as creating cash sales through quick sale.

By the end of this class you will have learned the following:

- Trigger Scanner set up (USB)
- Marrying UPC barcodes to product ID numbers in product catalog
- Using the trigger scanner for quick sales
- Printing barcode product labels from the product catalog
- Using the trigger scanner for sample check out/check in
- Printing barcode inventory labels
- Using the trigger scanner with inventory barcode label for quick sales

PS 214 Showroom Management

Reduce the costs spent on samples! This class is designed to give you the tools to manage your showroom samples and showroom inventory to reduce the costs of replacements.

By the end of this class you will have learned the following:

- Tracking the timely return of samples & inventory with sample checkout features
- How to run the sample & inventory late report
- Managing cash & carry sales
- Identifying sample location in the product catalog

Accounting

PS 205 Installer Holdbacks

Discover how to accrue labor wages to cover unforeseen labor losses! This class is designed to teach you the procedures involved in accruing labor wages to be paid out in the future beyond the installation pay period.

By the end of this class you will have learned the following:

- How to set up laborers' ledger holdback accounts to accrue wages
- Paying the labor percentage amount to the holdback accounts
- Setting up the payable to pay accrued wages
- Paying the accrued wages to laborers

PS 206 Vendor Deposits

Make a pre-payment deposit to a material vendor and still cost verify! This class is designed to explain the procedure involved in paying a vendor a deposit for materials before cost verification.

By the end of this class you will have learned the following:

- How to set up a suspense vendor deposit ledger account
- Creating a payable to pay the vendor deposit
- Cost verifying the actual purchase order to the vendor bill
- Paying the pre-paid deposit amount against the vendor bill

PS 207 Tracking Material Claims

Track a claim to a vendor! This class is designed to offer a tracking procedure for vendor claims and allow you to see which claims are still outstanding.

By the end of this class you will have learned the following:

- How to set up a suspense vendor claim ledger account
- Creating the claim to the vendor
- Utilizing the suspense account
- Processing the credit for the claim

PS 208 Replacement Materials

Track material replacements accurately! This class is designed to explain the correct procedure when ordering material replacements for jobs.

By the end of this class you will have learned the following:

- How to return and track material for new product & same product
- How to return materials to attic stock when needed
- How to make sure costs are accurate on the job
- How to create vendor credits for returned material when needed

PS 212 Pricing Credits

Cost a pricing credit directly back to the job and inventory! This class is designed to take you through the process of crediting inventory and jobs for a vendor issued pricing credit on incorrect billing.

By the end of this class you will have learned the following:

- Creating a payable credit for the existing purchase order
- Entering the pricing credit information & distributing taxes
- Reviewing the changes on jobs and the inventory record

PS 213 Installer Supplies

Accurately track sales to installers for supplies used in installation! This class is designed to sell, track and deduct supplies to installers.

By the end of this class you will have learned the following:

- Setting up installers as customers & setting up installer suspense accounts
- Sell installers supplies from inventory
- Creating payables to deduct from installer check print runs

System Administration

PS 101 Account Management

Take an active roll in the management of your account at Pacific Solutions! This class is designed to inform you about the how-to of our support desk and what a current account means to you.

By the end of this class you will have learned the following:

- How to identify yourself to Pacific Solutions
- Calling the support desk
- Your account number
- Your log in user name and password for pacific-solutions.com
- How to keep your support account current
- What to do if your maintenance is past due

PS 102 System Maintenance

A clean system is a system with years of return! This class is designed to guide you in the proper use of maintenance routines and the maintenance of jobs in your management system.

By the end of this class you will have learned the following:

- Confirming a/r, a/p, customer payments
- Closing jobs
- Marking commissionable jobs paid
- Checking customer account status routine
- Clearing blank customer/quote/payable records
- Job Progress reports
- Locking sales

PS 202 Spreadsheet Imports

Electronically import your non-B2B vendor pricing into the product catalog! This class is designed to help you understand the spreadsheet import/export process and give you helpful tools to manipulate the data before brining it into the product catalog.

By the end of this class you will have learned the following:

- The import spreadsheet templates
- Using the spreadsheet import templates
- Importing the spreadsheet data into the bridge file
- Using the spreadsheet import routine to substitute information on the spreadsheet
- Correcting/deleting information on the import spreadsheet
- Exporting the spreadsheet data from the bridge file into the product catalog

PS 215 Reports

Understand your business activity and manage your jobs in progress more efficiently! This class is designed to expose the power of our management reports and give you valuable information regarding the progress of your business.

By the end of this class you will have learned the following:

- Products sold by type and custom reports
- Job progress status custom reports
- Inventory to order and on hand inventory reports
- Contract detail reports

FM 310 System Posting Routines: FloorManager

Gain more understanding into your balance sheet and income statement! This class is designed to offer insight into how and when specific numbers are generated on the balance sheet and income statement.

By the end of this class you will have learned the following:

- When sales revenue posts to revenue g/l account and the income statement
- When inventory asset value posts to the g/l inventory account
- Affect of delivering materials from inventory vs. invoicing inventory
- Difference between an unverified inventory entry and a verified inventory entry
- How payables for inventory posts to the g/l
- Where to find detailed debits and credits posting in specific g/l accounts
- How to post transitional entries during the crossover periods

JR 310 System Posting Routines: JobRunner

Gain more understanding into your balance sheet and income statement! This class is designed to offer insight into how and when specific numbers are generated on the balance sheet and income statement.

By the end of this class you will have learned the following:

- When sales revenue posts to revenue g/l account and the income statement
- When inventory asset value posts to the g/l inventory account
- Affect of delivering materials from inventory
- How payables for inventory posts to the g/l
- Where to find detailed debits and credits posting in specific g/l accounts
- How to post transitional entries during the crossover periods
- Difference between stock inventory and special order inventory and how it affects the inventory asset value