

Integrating FloorRight with Management Software

Regardless of which management system you are using the steps stay the same.

If you consider your jobs one off materials, meaning that the materials wouldn't be in your product catalog, please following these instructions. You can also do this method if you would rather wait to associate your materials once the information has been exported into your management system. This is the easiest way to do the integration and it's the recommended method.

Note: If you are using a FloorRight template that has a fair amount of job estimate items self-populating, please consider removing those items and saving your file as a new template. If you decide to keep them you may delete the unnecessary job estimate items from the job estimate screen. You don't want unneeded line items exporting to your management systems. This creates clutter and requires too much clean up once the FloorRight file exports into the management system.

For users not using the Kit feature in your management system please do the following. If you plan on using the Kit feature perform steps 1-8a but then skip step 8b and proceed with the remaining steps.

- 1) Open the management software and log in.
 - a. The integration will send the quantities to a new proposal regardless of the area you are in in the management system.
- 2) In the Client section of your management software, please make sure that the GC, Client, Builder, Designer, etc. information is already in the database.
- 3) Save your FloorRight file.
- 4) When prompted for the customer information do the following:
 - a. In the lower left hand corner of the Customer Information field there is a button that says "Import". Please click that.
 - b. Your management software will be brought to the foreground automatically and will be opened to the "Find Company/Customer" search field.
 - c. Locate the client for the project you are doing the take-offs for. This should be done exactly the same way you are use to in the management software.
 - d. Click the arrow on the left side of the Client Id to want to select.
 - i. The management software will push that client information over to FloorRight automatically.
 1. If you find that the Customer Information field has disappeared in FloorRight just left-click anywhere in FloorRight and the field will reappear.
 - ii. If you are missing information in the "Contact/Phone" field, remember this information is required and will need some

type of content in here. A name or phone number will be adequate.

- iii. No other tabs are necessary to look at.
 - iv. Click OK to close this window.
- 5) If you haven't save the file prior to these steps, the next screen that will open will be the "Save As" screen. Save as you normally would.
 - 6) Perform your take-offs in FloorRight in the same manner as usual.
 - 7) Assigns all tags, transitions, 3D tags, align grids, seams placements, multipliers, etc.
 - 8) Open the Job Estimate screen
 - a. If you want to give your material items and job estimate items a more descriptive name you may do so at this point. For example your carpet may need to be labeled with the manufacture information, style, description. This information, while not associated with any material in the product catalog at this point, will still import in to your management system directly in Notes Field.
 - i. You may also do the same for any job estimate items and tags.
 - ii. Double-check all your material quantities and waste percentages.
 - b. Build your estimate with all the grout, thin set, and adhesive lines.
 - i. If you bundle all your job estimate lines with your labor, it is not necessary to add all the job estimate items.
 - 9) If your job has Base-Stock on Page selected you should see multiple tabs at the bottom of the Job Estimate Screen. You should see a tab for every drawing page plus an All Pages tab.
 - a. FloorRight will allow each individual tab to export into the management software but it will have to be done a tab at a time. If you need to only export the grand totals from the All Pages tab please make sure you are on that tab before continuing on to step 10.
 - i. Side note, if you have used the multiplier know that the quantities that export to the management software will be from the multiplied column.
 - 10) From the menu at the top of the Job Estimate screen go to File and click on Export.
 - a. The next routine is a script that is running in the background. FloorRight is pushing all the information on the Job Estimate screen and the Client information and ID directly to a Proposal.
 - 11) Once the information is in the Proposal, you may now use the Product ID search fields to complete your proposal as usual.
 - 12) If you are using the Kit feature, once you have a product on the proposal with a Kit available please click that option to finish building the proposal.

If your products and labor are in your catalogs of the management software please do the following. This is a very detailed process that involves a lot of importing and exporting between FloorRight and your management software.

Note: If you are using a FloorRight template that has a fair amount of job estimate items self-populating, please consider removing those items and saving your file as a new template. If you decide to keep them you may delete the unnecessary job estimate items from the job estimate screen. You don't want unneeded line items exporting to your management systems. This creates clutter and requires too much clean up once the FloorRight file exports into the management system.

For users not using the Kit feature in your management system please do the following. If you plan on using the Kit feature perform steps 1-8a but then skip step 8b and proceed with the remaining steps.

- 1) Open the management software and log in.
 - a. The integration will send the quantities to a new proposal regardless of the area you are in in the management system.
- 2) In the Client section of your management software, please make sure that the GC, Client, Builder, Designer, etc. information is already in the database.
- 3) Save your FloorRight file.
- 4) When prompted for the customer information do the following:
 - a. In the lower left hand corner of the Customer Information field there is a button that says "Import". Please click that.
 - b. Your management software will be brought to the foreground automatically and will be opened to the "Find Company/Customer" search field.
 - c. Locate the client for the project you are doing the take-offs for. This should be done exactly the same way you are use to in the management software.
 - d. Click the arrow on the left side of the Client Id to want to select.
 - i. The management software will push that client information over to FloorRight automatically.
 1. If you find that the Customer Information field has disappeared in FloorRight just left-click anywhere in FloorRight and the field will reappear.
 - ii. If you are missing information in the "Contact/Phone" field, remember this information is required and will need some type of content in here. A name or phone number will be adequate.
 - iii. No other tabs are necessary to look at.
 - iv. Click OK to close this window.
- 5) If you haven't save the file prior to these steps, the next screen that will open will be the "Save As" screen. Save as you normally would.
- 6) Perform your take-offs in FloorRight in the same manner as usual.

- 7) For best results, please do the next several steps with the Base Stock on Page turned off!
- 8) Assigns all tags, transitions, 3D tags, align grids, seams placements, multipliers, etc.
- 9) Open the Job Estimate screen
 - a. To associate your material to a product in your management software do the following:
 - i. Left click on the row, from the far left at the number of the row you want to associate, and the row should be selected.
 - ii. The next click will be a Right click where you will see a menu with the option to Import.
 - iii. Hover your mouse over the word Import and an additional menu will become visible. From here you will be able to import from the Product or Service (Labor) catalog.
 1. The next routine is a script that is running in the background. FloorRight is calling to the management software for the appropriate catalog.
 - iv. Find the Product/Service item you want to add as you normally would and then select it.
 1. That information will overwrite the current information on that line in FloorRight and will leave the quantity values unchanged.
 - b. Build your estimate with all the grout, thin set, and adhesive lines as needed.
 - i. Each line can be associated from the Product/Service catalog as described in step 8a.
 - c. Repeat steps 8a as needed.
- 10) If you turned the Base Stock on Page off as recommended at 7 then your job will have all the job estimate items properly displayed once Base Stock on Page is turned back on. Otherwise, you will need to do the job estimate items importing per tab.
- 11) If Base-Stock on Page is selected you should see multiple tabs at the bottom of the Job Estimate Screen. You should see a tab for every drawing page plus an All Pages tab.
 - a. FloorRight will allow each individual tab to export into the management software but it will have to be done a tab at a time. If you need to only export the grand totals from the All Pages tab please make sure you are on that tab before continuing on to step 10.
 - i. Side note, if you have used the multiplier know that the quantities that export to the management software will be from the multiplied column.
- 12) From the menu at the top of the Job Estimate screen go to File and click on Export.
 - a. The next routine is a script that is running in the background. FloorRight is pushing all the information on the Job Estimate screen and the Client information and IDs directly to a Proposal.

13) If you are using the Kit feature, once you have a product on the proposal with a Kit available please click that option to finish building the proposal.

Keep in mind that at no point is it required to do the import/export routine as described above. If you find that there is one line or multiple lines you want to import you may do so. This is not an All or Nothing routine. You can pick and choose, at your preference, which items you want to associate from the Product/Service catalogs.

Remember, the point of this integration is to keep from transposing numbers. 5,100sf of materials easily get typed in as 1,500sf. That's a big mistake!