

Integrating FloorRight with Management Software



Overview:



Learn how to import customer information into FloorRight and export the quantities to a quote in Jobrunner.



Integration between FloorRight and the management program is helpful to eliminate mistakes and save time when entering material quantity.



The FloorRight user can import a customer from the customer database in the management program.



The FloorRight user can import products from the product catalog in the management program.



Once finished adding products the user can export the data to a new quote in the management program.



This automatic export process is helpful so the user does not have to manually enter the quantities of each product.



Import a customer into FloorRight from Jobrunner:



 Open a saved FloorRight file. To import a customer click "Job" then click "Edit Customer Information".



2. Left click "Import". Once the customer database opens in the management program search for the customer.



Find Company / Customer

Enter Company / Customer Information

Customer ID	Q	Sales Person	Q
Acct Name	Pacific Solutions		
Company	Q		
Address / Lot / Suite	Q		
City, St, Zip	Q		Q Q
Phone	٩	Member Status	
SIC Code	Q	Division	Q
ID Status	٩	Fla	agged 🔲 Deactivated 🔲
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Customer Inform	ation	×
Proposal For Ship	o To Other	
	Contact/Phone	
Name*	Pacific Solutions TEST JOB INFORMATION	
Address 1	8850 VILLA LA JOLLA DRIVESTE 310	
Address 2		
City, State, Zip	LA JOLLA CA 92037	
Phone*	858 361-5991 Fax	
	* Required field	
Import	Map It OK Cano	cel



3. Once the customer is imported into FloorRight, left click "OK". Now the user can import products or export the data to the management program.



Export data from FloorRight to the Management program:



1. In the Job estimate left click "File" then move the cursor over "Export" and left click "Direct".



Prir			18	Description	Based on	Tag	Length	Material qty.	Multiplied qty.	Waste	User add.	Boxed	Amt/box	Boxes	Unit price	Subtotal	Tax
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	WD-1	Lauzon Serie Whites Oak Serenity	25		Tile count			1,971 st	1,971 sf	3.68%	0%	ч	1.00	1971.	\$0.00 / sf	\$0.00	
23		Adhesive			Room area			1,898.51 st	1,898.51 sf			Γ			\$0.00 / sf	\$0.00	
24 25		_										П			\$0.00	\$0.00	
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2. The data from the Job estimate page will begin to transfer to Jobrunner or Floormanager to a new proposal.



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The three PDF quick reports and FloorRight file can be found on the "Forms" tab so the salesperson can view the files.

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The user can export the FloorRight data offline if the management software is on another computer.



How to export data offline:



In the Job estimate left click "File", move the cursor over "Export" and left click "Offline".



	Print. Print	Preview		96	Description	Based on	Tag	Length	Material qty.	Multiplied qty.	Waste	User add. 0%	Boxed	Amt / box	Boxes	Unit price	Subtotal	Tax
		Setup		-	NONE	Material area			27.92 st	27.92 st	0%	0%	Г	-		\$0.00 / st \$0.00	\$0.00	5
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		-		-		Room area			192.38 st	192.38 st						\$0.00/st \$0.00	\$0.00 \$0.00	
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		and Exit																
	Igno	re Changes and G	Close	htorin	Description 8	Tile count			201 sf	201 sf	3.44%	0%	M	1.00	201.	\$0.00 / sf	\$0.00	
	19												Г			\$0.00	\$0.00	
B	20		Subtotal														\$0.00	- 1
2	22	WD-1	Lauzon Serie Whites Oak Serenity	5		Tile count			1,971 st	1,971 sf	3.68%	0%	P	1.00	1971.	\$0.00 / sf	\$0.00	
	23		Adhesive			Room area			1,898.51 st	1,898.51 st			Г			\$0.00 / st	\$0.00	
2	24 25		Subtotal										Г			\$0.00	\$0.00 \$0.00	
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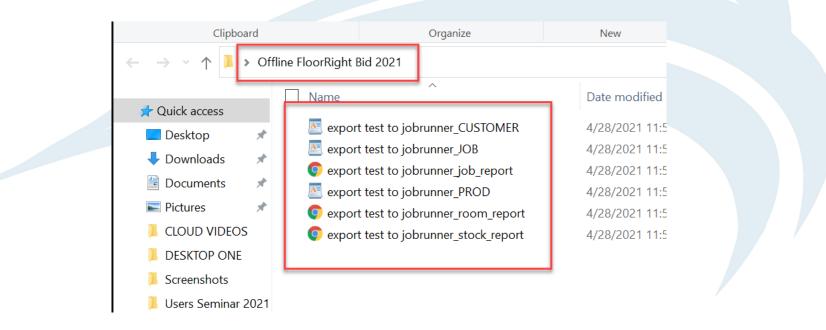
Search for the folder the offline data will be exported to. In Jobrunner we will import the files from this offline folder.

Note: A folder should already be created before exporting the data offline.



Browse For Folder	×	
Select a directory		
> 🔩 Windows-SSD (C:)	^	
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B2B DESKTOP II		
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Make New Folder OK	Cancel	





This is the data the has been exported from FloorRight and saved in the folder.



3. Have a new quote open in the management software and then click "Takeoff" and left click on "FloorRight".



4. Search for the folder the data was exported to then left click the folder and click "OK".



Print Transfer List	View Copy	Compress	Update	Template	Lock Template	Sessions	Export	Web Help	Takeoff	Audit Tool	Tax Calc	Setting
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5. A new quote with the customer information and material information will be generated.



Pacific Solutions 8850 VILLA LA JOLLA DRIVE STE 310 LA JOLLA 858 361-5991 Fax	Contact / Phone	Ship To Name Location Address Lot Suite # City, State, Zip Phone Cell	Community / Plan	Owner General Contractor Architect Designer Project Manager Accounting Manager Job Start Date Job Description		ate Contract # (28/2021) One Point Floors Arketing Source Market Sector Use Person 1 Use Person 2		
	es Upgrades Bundle ter Product Type	Alternates Profits J	ob Mail 🕺 GPM 🎽 Forms 🚺		Show Parameters Show Extended	Entry		
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Materials 27.92 Line# 1 Labor Notes Q 1 1 Color/Desc	SF	Tub Jumper	Notes Q 🗈 🖆			Notes Q 🗈 📋		\$0.00
Materials 20 Line# 2 Labor Notes Q 🖹 🗂 Color/Desc	Name: Tub Jumper SF cription: Samatra Sliced Flat Oval	Samatra Sliced Flat Oval	Installer 🔅			Notes Q 1 1		\$0.00
Materials 74	Name: Samatra Sliced Flat Oval	Portfolio Dove Grey	Installer 🕏			PO		\$0.00
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Job Analy More Details Total Job Cost Total Job Profit Total Job GPM	Sis Budgeted Labor Materials Grand		Information			Q Conditions		



6. The user can add specific products and materials to each line to finish the proposal.



Import a product into FloorRight from the management program:



Products in the management program can be imported into FloorRight from the product catalog.



1. Open the Job Estimate page and left click on the product line that will get a product from the management software.



2. Right click on the line and move the cursor over "Import" and choose "Product".

Note: The user can import a service for grout or adhesive, but it is recommended to use KITS in the management software and add specific line-item information in the management program.



Job Estimate

File Edit Job

	Color	Item name	Description	Based on	Tag	Length	Materia
	INONE	Tub Jumper	NONE	Material area			
2 3		Subtotal					
	SWR Samatra S	Samatra Siced Fla	ıt	Tile count			
,	Delete Row(s)	al					
	Import	> Prod	uct	Tile count			
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			Description 5	Tile count			
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15				roomaroa			
16		Subtotal					
17							
18	T-4 WALL Mytho	Mythology Santorin Glazed	i Description 8	Tile count			
19							
20		Subtotal					
21							
22	WD-1	Lauzon Series Whites Oak Serenity		Tile count			
23		Adhesive		Room area			1,2
24							
25		Subtotal					
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3. Once the product catalog opens in the management program, search for a specific material.



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File Edit View Insert Format Requests Scripts Tools Window Help

- 1	Manufacturer	Vendor	Product	Туре
1	Nistate Rubber Base			
	Altro Floors		Q	
	Amtico		Sell Pro	c
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	Armstrong Hardwood Atlas Atlas Concorde Azrock Dasf Besulieu Of America Ronfoy Higelow Carpets Bolyu Dostik Disable Discount	Fiber Q Buying Group Q Rayalty Q aw Manufacturer to Inventory Reg Discontinue Line	Protection Q. Display Q. Modification Date Q. Use B	Weight Q Gauge Q Time Q Print Set C C C C C C C C C C C C C C C C C C C
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roduct Information Narufacturer	Vendor	Product Type	Unit	Width (FI)		
Mas	ATLAS CARPET MILLS	Carpet Tile	SY	19.7		
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Coriu Tile - Mediterranea Col	lection					
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Color		Product ID #		UPC #		
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Delicate Gold		1952				
Flaxen Sky Honesuckle Red		1945				
Honesuckle Red		1948				
🗾 Lime Delight		1957				
Meadow Sweeps		1950				
Nutmeg		1946				
Omage Orange		1947				
Quasar Blue		1951		*		
Display	Sell Sale %	ott Unit Set	ture Sell Active Date			



4. After selecting a material in the management program the product will be imported into the job estimate page.



🔳 Job Estimate

File Edit Job

	Color	Item name	Description	Based on	Tag	Length	Material qty.	Multiplied qty.	Waste
1		Tub Jumper	NONE	Material area			27.92 sf	27.92 sf	0%
2									
1 2 3 4		Subtotal							
1					_				
5		Corfu Tile - Mediterranea Collection / Charcoal Slate	Carpet Tile	Tile count			20 sf	20 sf	14.06%
<mark>6</mark>									
Ď,		Subtotal							
38									
9	T-2 Portfolio Dove	Portfolio Dove Grey		Tile count			74 sf	74 sf	7.98%
-10									
11		Subtotal							
12									
13	T-4 Portfolio Iron (portfolio Iron grey	Description 5	Tile count			220 sf	220 sf	12.55%
14				Room area			192.38 sf	192.38 sf	
15									



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.



You can pick and choose which items you want to associate from the Product/Service catalogs.



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!



See you tomorrow at Breakfast 8:00 – 9:00 am

Followed by: General Session in Griffin Ballroom Starting at 9:00 am