



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:

1. 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	<input type="text"/>	Sales Person	<input type="text"/>
Acct Name	<input type="text" value="Pacific Solutions"/>		
Company	<input type="text"/>		
Address / Lot / Suite	<input type="text"/>		
City, St, Zip	<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone	<input type="text"/>	Member Status	<input type="text"/>
SIC Code	<input type="text"/>	Division	<input type="text"/>
ID Status	<input type="text"/>	Flagged	<input type="checkbox"/>
		Deactivated	<input type="checkbox"/>

Customer Information ✕

Proposal For | Ship To | Other |

Name*	Pacific Solutions	Contact/Phone	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 | Cancel

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”.

Job Estimate

File Edit Job

- Print...
- Print Preview...
- Print Setup...
- Print Format...
- Quick Report
- Quick Report Preview
- Reports >
- Import >
- Export >**
 - Direct**
 - Online
- Export Selected >
- Sort by >
- Save
- Save and Exit
- Ignore Changes and Close

	Description	Based on	Tag	Length	Material qty.	Multiplied qty.	Waste	User add.	Boxed	Amt / box	Boxes	Unit price	Subtotal	Tax
	NONE	Material area			27.92 sf	27.92 sf	0%	0%	<input type="checkbox"/>			\$0.00 / sf	\$0.00	\$0.00
									<input type="checkbox"/>			\$0.00	\$0.00	\$0.00
									<input type="checkbox"/>			\$0.00	\$0.00	\$0.00
	ed Flat	Tile count			20 sf	20 sf	14.06%	0%	<input checked="" type="checkbox"/>	1.00	20	\$0.00 / sf	\$0.00	\$0.00
									<input type="checkbox"/>			\$0.00	\$0.00	\$0.00
									<input type="checkbox"/>			\$0.00	\$0.00	\$0.00
	Grey	Tile count			74 sf	74 sf	7.98%	0%	<input checked="" type="checkbox"/>	1.00	74	\$0.00 / sf	\$0.00	\$0.00
									<input type="checkbox"/>			\$0.00	\$0.00	\$0.00
									<input type="checkbox"/>			\$0.00	\$0.00	\$0.00
	Grey	Tile count			220 sf	220 sf	12.55%	0%	<input checked="" type="checkbox"/>	1.00	220	\$0.00 / sf	\$0.00	\$0.00
	Room area				192.38 sf	192.38 sf			<input type="checkbox"/>			\$0.00 / sf	\$0.00	\$0.00
									<input type="checkbox"/>			\$0.00	\$0.00	\$0.00
									<input type="checkbox"/>			\$0.00	\$0.00	\$0.00
	ntorin	Description 8			201 sf	201 sf	3.44%	0%	<input checked="" type="checkbox"/>	1.00	201	\$0.00 / sf	\$0.00	\$0.00
19									<input type="checkbox"/>			\$0.00	\$0.00	\$0.00
20		Subtotal											\$0.00	\$0.00
21														
22	WD-1	Lauzon Series Whites Oak Serenity			1,971 sf	1,971 sf	3.68%	0%	<input checked="" type="checkbox"/>	1.00	1971	\$0.00 / sf	\$0.00	\$0.00
23		Adhesive			1,898.51 sf	1,898.51 sf			<input type="checkbox"/>			\$0.00 / sf	\$0.00	\$0.00
24									<input type="checkbox"/>			\$0.00	\$0.00	\$0.00
25		Subtotal											\$0.00	\$0.00
26														
27	Jolly Bulnose	Tag		Length	65 5"	65 5"		0%	<input type="checkbox"/>			\$0.00 / ft	\$0.00	\$0.00
28														
29		Subtotal											\$0.00	\$0.00
30														
31	Noisnos	Tag		Length	33 3"	33 3"		0%	<input type="checkbox"/>			\$0.00 / ft	\$0.00	\$0.00
32														
33		Subtotal											\$0.00	\$0.00
34														

< >

< > 1st Floor / 2nd Floor / Laundry / Master Bath / Girls bath / Boys Bath / Bar / Kitchen / Butler 1 / Butler 2 / Butler 4 / All Pages /

Total \$0

2. The data from the Job estimate page will begin to transfer to Jobrunner or Floormanager to a new proposal.

QT1v10

File Edit View Insert Format Records Scripts Tools Window Help

New Delete Find Find All Print Transfer List View Copy Compress Update Template Lock Template Sessions Export Web Help Takeoff Audit Tool Fax Cal

Template Sale % Comp

Quote One Point Floors

1 of 1 523

Proposal For **Contact / Phone**

Name Location

Address

Lot / Suite #

City, State, Zip

Phone Fax

Cell

Ship To **Community / Plan**

Name Location

Address

Lot / Suite #

City, State, Zip

Phone Fax

Cell

Opportunity #

Owner

General Contractor

Architect

Designer

Project Manager

Accounting Manager

Job Start Date

Job Description

Proposal # **Customer PO**

9545

Date **Contract #**

4/27/2021

Store **Entry Person**

1 One Point Floors

Marketing Source **Market Sector**

Sales Person 1

Sales Person 2

Entry CRM Activites Upgrades Bundle Alternates Profits Job Mail GPM Forms

Filter Mat / Lab Filter Product Type

Type	S.Quan	W.Quan	Unit	Length Width	ID#	Manufacturer / Product Description Labor Type / Labor Description	Color / Item Number Area	Kits	Actions	Unit Cost	Freight 1 Cost	Freight 2 Cost	Tax Cost	Total Profit	Sell	Sell Extended
Line# 1 Labor	27.92		SF			Tub Jumper	NONE									\$0.00
Notes Customer	Color/Description: Tub Jumper Style/Item Name: Tub Jumper															
Line# 2 Labor	20		SF			Samatra Sliced Flat Oval										\$0.00
Notes Customer	Color/Description: Samatra Sliced Flat Oval Style/Item Name: Samatra Sliced Flat Oval															
Line# 3 Labor	74		SF			Portfolio Dove Grey										\$0.00
Notes Customer	Color/Description: Portfolio Dove Grey															

Budgeted Profits

Job Analysis

More Details

Total Job Cost

Total Job Profit

Total Job GPM

Totals

Refresh Totals

Labor \$0.00

Materials \$0.00

Grand Total \$0.00

Information

Information

Terms

Conditions

Navigator Customer Opportunity Takeoff Job PO Product Catalog Calendar Invoices A/R Job Mail

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

QT1v10

File Edit View Insert Format Records Scripts Tools Window Help

New Delete Find Find All Print Transfer List View Copy Compress Update Template Export Web Help Audit Tool Settings

Template Sale % Comp

Forms

One Point Floors

1 of 1 523

Proposal For **Contact / Phone** **Ship To** **Community / Plan**

Name: [Dropdown]
 Address: [Text]
 Lot / Suite #: [Text]
 City, State, Zip: [Text]
 Phone: [Text]

Proposal #: 8545
 Date: 4/27/2021
 Store: 1 One Point Floors
 Marketing Source: [Text]
 Sales Person 1: [Text]
 Sales Person 2: [Text]

Customer PO: [Text]
 Contract #: [Text]
 Entry Person: [Text]
 Market Sector: [Text]

Entry CRM Activites Upgrades Bundle Alternates Profits Job Mail **Forms**

Docs

Type	Description	Attachment (Click to Add / View)	Added By / Date Time
FloorRight		export test to jobrunner.flr	4/27/2021 4:29:13 PM
FloorRight		export test to jobrunner_job_report.pdf	Bonni 4/27/2021 4:29:13 PM
FloorRight		export test to jobrunner_room_report.pdf	Bonni

Forms

Form Name	Date	Created By	Notes	Status	Actions
[Search]				Resolved Open	[New] [Del]

Navigator Customer Opportunity Takeoff Job PO Product Catalog Calendar Invoices A/R Job Mail

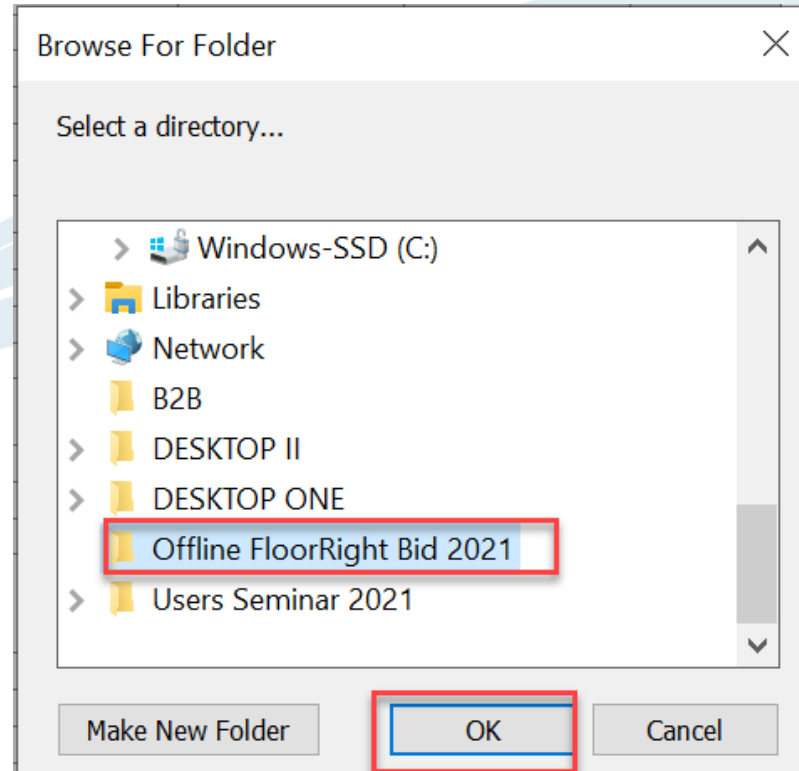
The user can export the FloorRight data offline if the management software is on another computer.

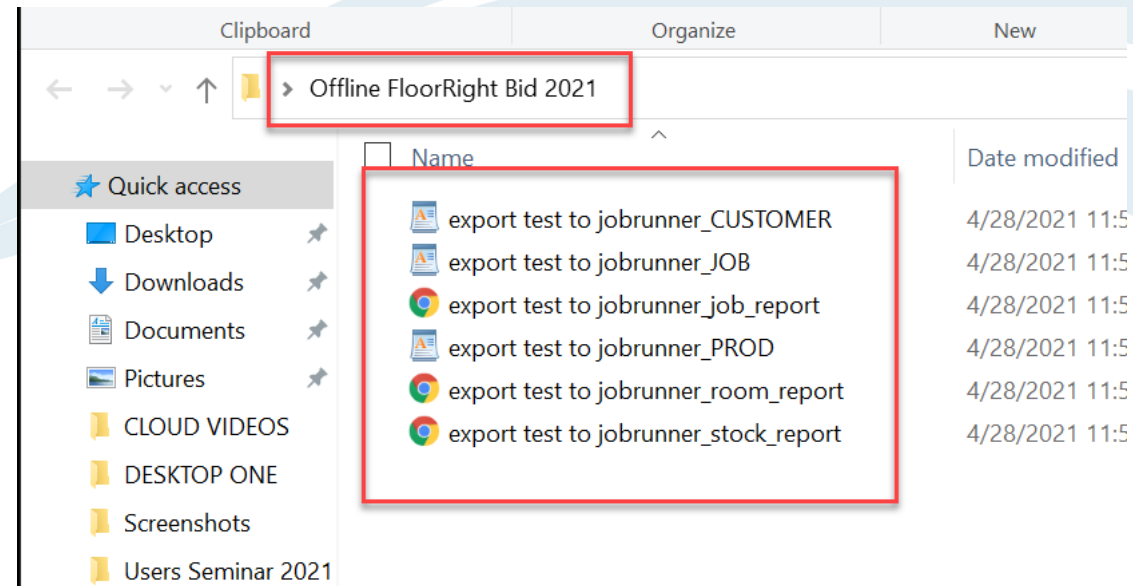
How to export data offline:

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

2. 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.





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".

One Point Floors

Takeoff

Offline FloorRight Bid 2021

OK

Totals	
Labor	\$0.00
Materials	\$0.00
Sales Tax	
Grand Total	\$0.00

Opportunity #

Owner

General Contractor

Architect

Designer

Manager

Start Date

Description

Customer PO

Contract #

Entry Person

Market Sector

Sales Person 1

Sales Person 2

Import Lines

Sell

Total

Actions

Jump to Line

Refresh Totals

Details/Signature

Terms

Opportunity

Takeoff

Job

PO

Product Catalog

Calendar

Invoices A/R

Job Mail

5. A new quote with the customer information and material information will be generated.

Proposal For **Contact / Phone**

Pacific Solutions

8850 VILLA LA JOLLA DRIVE
STE 310
LA JOLLA CA 92037
858 361-5991 Fax

Ship To **Community / Plan**

Name
Location
Address
Lot / Suite #
City, State, Zip
Phone Fax
Cell

Owner

General Contractor
Architect
Designer
Project Manager
Accounting Manager
Job Start Date
Job Description

Date Contract #
4/28/2021
Store Entry Person
One Point Floors
Marketing Source Market Sector
Sales Person 1
Sales Person 2

Entry CRM Activites Upgrades Bundle Alternates Profits Job Mail GPM Forms

Type	S. Quan	W. Quan	Unit	Length Width	ID#	Manufacturer / Product Description Labor Type / Labor Description	Color / Item Number Area	Kits	Actions	Unit Cost	Freight 1 Cost	Freight 2 Cost	Tax Cost	Total Profit	Sell
Line# 1 Materials Labor	27.92		SF			Tub Jumper	NONE								\$0.00
Notes Customer	Color/Description: Tub Jumper Style/Item Name: Tub Jumper														
Line# 2 Materials Labor	20		SF			Samatra Sliced Flat Oval									\$0.00
Notes Customer	Color/Description: Samatra Sliced Flat Oval Style/Item Name: Samatra Sliced Flat Oval														
Line# 3 Materials Labor	74		SF			Portfolio Dove Grey									\$0.00
Notes Customer	Color/Description: Portfolio Dove Grey														

Budgeted Profits

Job Analysis Totals

More Details Budgeted Refresh Totals

Total Job Cost		Labor	\$0.00
Total Job Profit		Materials	\$0.00
Total Job GPM	?	Grand Total	\$0.00

Information

Information

Terms

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	Material
1	NONE	Tub Jumper	NONE	Material area			
2							
3		Subtotal					
4							
5	SWR Samstra S	Samatra Sliced Flat		Tile count			
6							
7							
8							
9							
10							
11							
12							
13							
14							
15		Subtotal					
16							
17							
18	T-4 Wall Mythology	Mythology Santorini Glazed	Description 8	Tile count			
19							
20		Subtotal					
21							
22	WD-1	Lauzon Series Whites Oak Serenity		Tile count			
23		Adhesive		Room area			1.8
24							
25		Subtotal					
26							

3. Once the product catalog opens in the management program, search for a specific material.

PC1v10
File Edit View Insert Format Requests Scripts Tools Window Help

Find Product

Specific Product Information

<input type="text" value="Manufacturer"/>	Vendor <input type="text"/>	<input type="text" value="Product Type"/>
<input type="text" value="Nislate Rubber Gape"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Altra Floors"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Amrica"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Ardex"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Armstrong"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Armstrong Hardwood"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Atlas"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Atlas Concrete"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Azrock"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Dasf"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Dealeu Of America"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Rentley"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Bigelow Carpets"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Dolyu"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="Duslik"/>	<input type="text"/>	<input type="text"/>

General: Disable Discount Show Style / Model #

Product: Low Manufacturer Low Inventory Req Discontinue Line Print Set Use Box Quantity Lock Cost

Cancel

Product Pricing

Product Information

Manufacturer	Vendor	Product Type	Unit	Width (ft)
Atlas	ATLAS CARPET MILLS	Carpet Tile	SY	19.7
Style	Style / Model Number		Collection	
Coru Tile - Mediterranean Collection				

Lookup

Color	Product ID #	UPC #
Charcoal Slate	1944	
Charcoal Slate	1956	
Overlook	1949	
Delicate Gold	1952	
Flaxen Sky	1945	
Honesuckle Rod	1948	
Line Delight	1957	
Meadow Sweeps	1950	
Nutmeg	1946	
Orange Orange	1947	
Quasar Blue	1951	

Display

Sell	Rate	% off	Unit
			SY
			SF

Future Sell

Sell	Active Date

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

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!

Next Up: Afternoon Refreshments 2:30 – 2:50 pm

Followed by: Breakout #7
2:50 – 3:35 pm

- Warehouse Management Best Practices – Griffin Ballroom
- Flooring Financial – Belle Meade Room
- FloorRight in 3D – Arlington Room