

Multi Unit Proposal Best Practices in JobRunner

Learn the best way to build proposals in JobRunner for multi unit projects. Discover the benefits to this practice and learn why other processes may be hurting your business.

Matt Stevens

To do or not to do

- A few common things to avoid
 - Why avoid these
 - Tools to use instead
- The things to do.
 - The reason these need to be done.
 - More tools to help

Avoid lump sum budgets



Example

- 15000 SF LVT Shaw...
 - LVT
 - Adhesive
 - Primer
 - Patch material
- 15000 SF LVT Labor
 - LVT Install
 - Floor prep
 - Primer application

What is the problem?

- No idea if budget is correct
- This will not be functional
- Variations for ordering
 - Example Adhesive

Tools to use.

- Use Kits to build out details
- Use Bundles to simplify

Avoid billing only Lines



Example

- 5350 SF Unit Ceramic Tile
\$10
 - This line charged to customer
- Itemized lines of cost for materials with \$0.00 sell

What is the problem?

- Billing revenue and costs out of proportion
 - This can negatively impact WIP
- Costs for tax calculations can also be incorrect.
- Lose use of invoicing tools

The Right Quantities



- Waste Percentage
 - Going out in phases
 - Whole pieces
- Can't combine common area and unit material on same line.
 - Schedule of Values
 - Break out phase quantities
 - When awarded/before transfer
- Estimate in groups and total
 - Down the road can use box qty on pick ticket
- Can use import lines from a template
- Bundle build entry

After the transfer



- Do not combine quantities on the same PO.
 - This will complicate receiving
 - Can't receive to multiple records

See you tomorrow at Breakfast

8:00 – 9:00 am

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