



New Features

Since the last UES



New bridge file for estimation import

< Proposal
Send To Proposal

For	Ship To	Customer PO	Architect
Company	Company	Contract #	Designer
Street	Street	Job Start Date	Project Manager
Suite/Apt/Unit	Suite/Apt/Unit	Owner	Accounting Manager
City	City	General Contractor	Line of Business
State	State		
Zip	Zip		
Phone	Phone	Job Description	
Fax			

Line Items Line Matching

Show All Pair Labor and Material

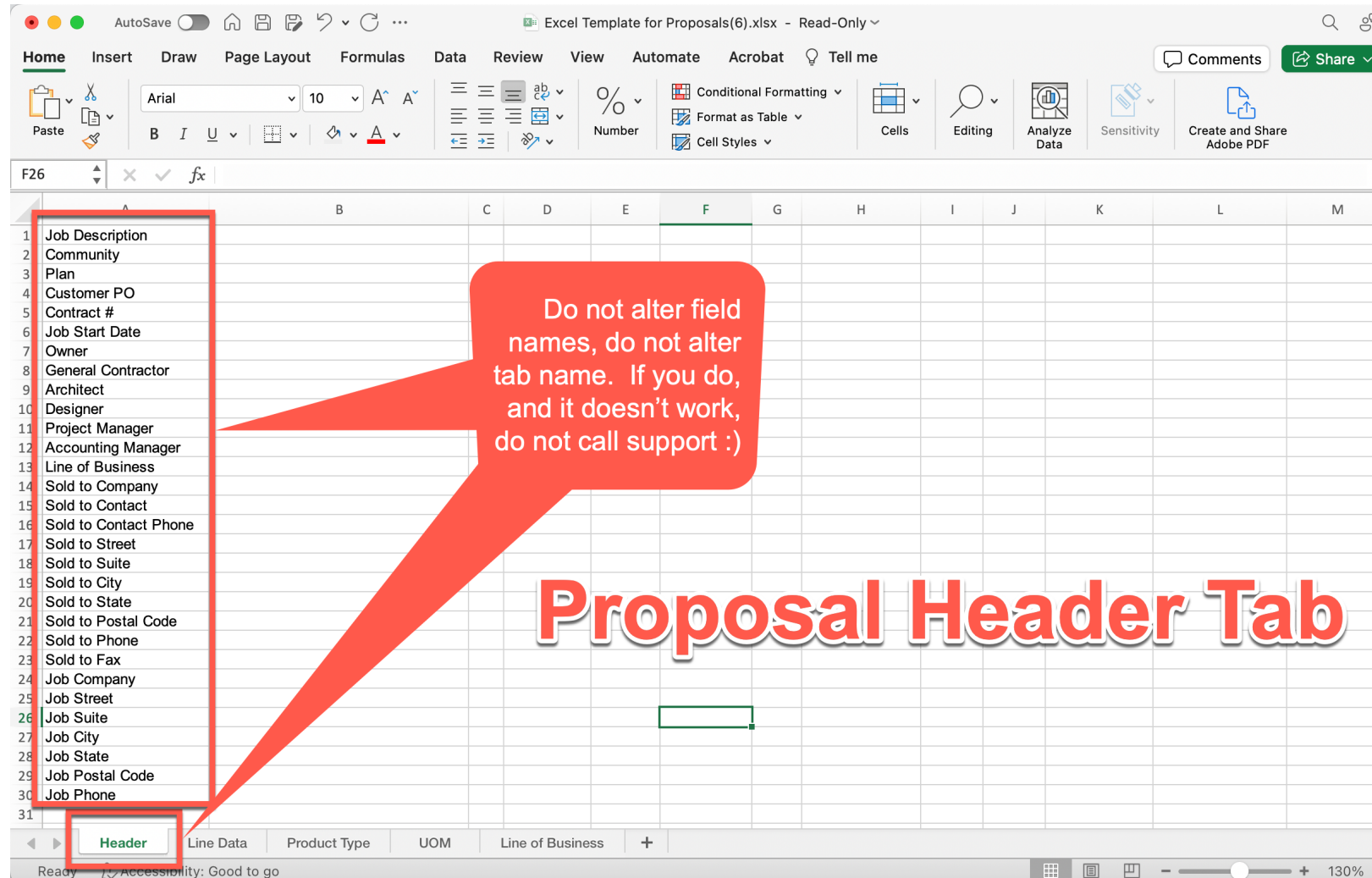
Linked	Omit All	Line #	Type	Product Type	S W	Quan Quan	Unit	Product ID	Style Name / Item # / Labor Description	Color Name / Item #	Area	Length Width	Freight	Cost Sell
<input type="checkbox"/>	<input type="checkbox"/>	1	Ceramic Tile		51.50	SY		Troubadour, Nomad, 18x36 FC2	Customer Notes	Installer Notes		L		\$35.00
<input type="checkbox"/>	<input type="checkbox"/>	2	Ceramic Tile		37.33	SY		Rough Idea - Shear, Design 800116, 24x24 FC3	Customer Notes	Installer Notes		L		\$35.00
<input type="checkbox"/>	<input type="checkbox"/>	3	Wall Base		4162.81	LF		Pinnacle Rubber Base, 129 Dolphin, 4" Cove Base BR1	Customer Notes	Installer Notes		L		\$1.16
<input type="checkbox"/>	<input type="checkbox"/>	4	Wall Base		2752.70	LF		Pinnacle Rubber Base, 129 Dolphin, 4" Straight Base BR2	Customer Notes	Installer Notes		L		\$1.16
<input type="checkbox"/>	<input type="checkbox"/>	5	Carpet Tile		1314.90	LF		Fray, Gray, 6x12 UPS BT1	Customer Notes	Installer Notes		L		\$13.25
<input type="checkbox"/>	<input type="checkbox"/>	6	Carpet Tile		1183.00	SY		Cryptogram, Oscillator 31373 FC1	Customer Notes	Installer Notes		L		\$23.50
<input type="checkbox"/>	<input type="checkbox"/>	7	Adhesive		23724.19	SF		Moisture Mitigation System MVC	Customer Notes	Installer Notes		L		\$0.00
<input type="checkbox"/>	<input type="checkbox"/>	8	Vinyl Resilient		249.19	SY		IQ Optima, 88 Beluga FVS1	Customer Notes	Installer Notes		L		\$39.46
<input type="checkbox"/>	<input type="checkbox"/>	9	Vinyl Resilient		25.46	SY		IQ Optima, 897 Slate FVS2	Customer Notes	Installer Notes		L	6'0"	\$39.46
<input type="checkbox"/>	<input type="checkbox"/>	10	Vinyl Resilient		65.00	SY		IQ Granit SD, 719 Raw Ivory FVS3	Customer Notes	Installer Notes		L	6'0"	\$44.10

Agreement Total

- FloorRight offline
- Callidus
- Measure
- Measure Square
- Estimat-All

Learn more in
breakout session
4 today

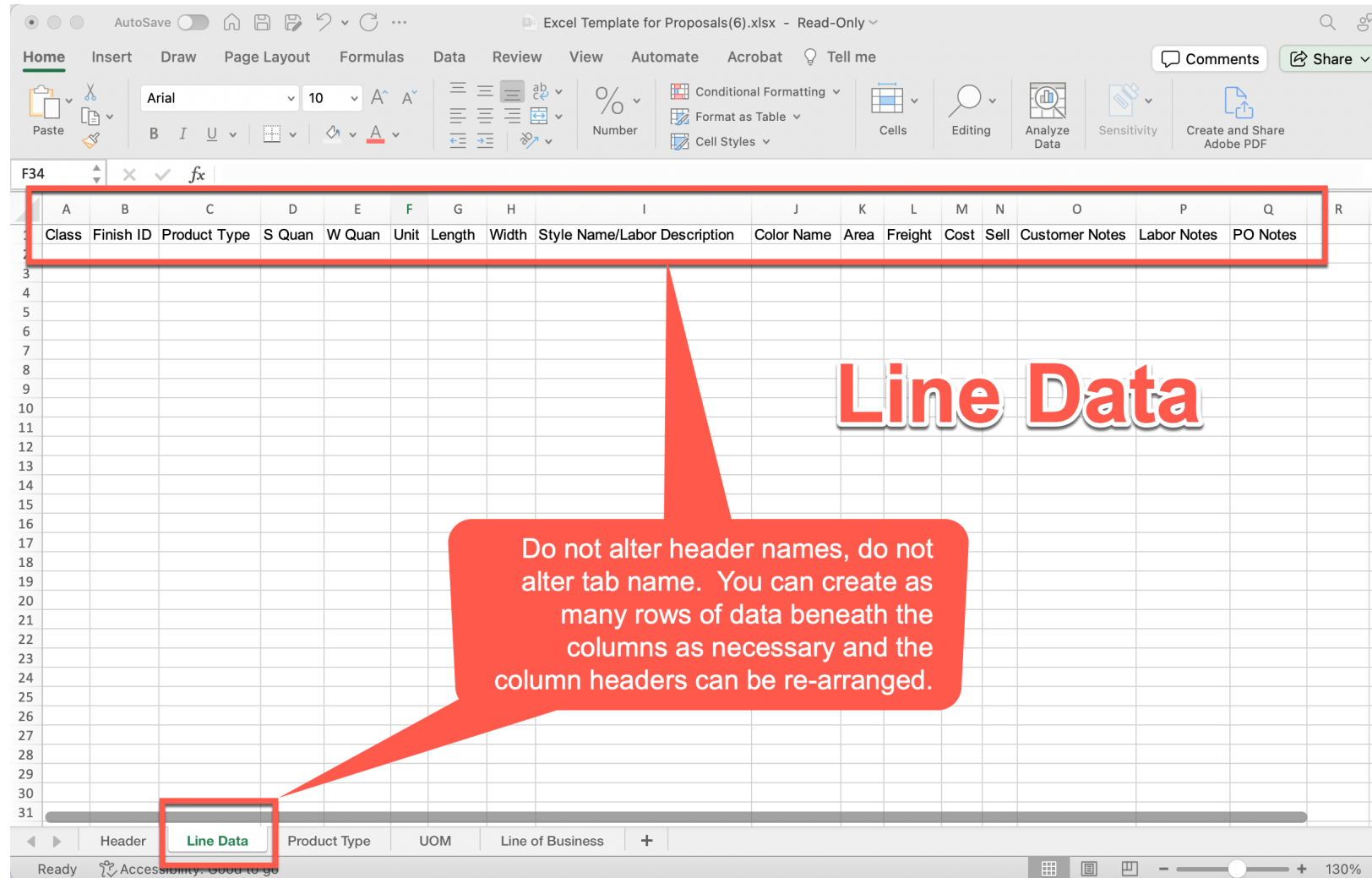
Import from Excel .xlsx



The screenshot shows the Microsoft Excel interface with the following elements:

- File Name:** Excel Template for Proposals(6).xlsx - Read-Only
- Home Tab:** Includes options for Paste, Font (Arial, size 10), Paragraph, Styles, Cells, Editing, Analyze Data, Sensitivity, and Create and Share Adobe PDF.
- Worksheet Grid:** Columns A through M, rows 1 through 31. The 'Header' tab is selected.
- Field List:** A list of fields in column A, rows 1-30, enclosed in a red box:
 - 1 Job Description
 - 2 Community
 - 3 Plan
 - 4 Customer PO
 - 5 Contract #
 - 6 Job Start Date
 - 7 Owner
 - 8 General Contractor
 - 9 Architect
 - 10 Designer
 - 11 Project Manager
 - 12 Accounting Manager
 - 13 Line of Business
 - 14 Sold to Company
 - 15 Sold to Contact
 - 16 Sold to Contact Phone
 - 17 Sold to Street
 - 18 Sold to Suite
 - 19 Sold to City
 - 20 Sold to State
 - 21 Sold to Postal Code
 - 22 Sold to Phone
 - 23 Sold to Fax
 - 24 Job Company
 - 25 Job Street
 - 26 Job Suite
 - 27 Job City
 - 28 Job State
 - 29 Job Postal Code
 - 30 Job Phone
- Callout Box:** A red speech bubble pointing to the field list with the text: "Do not alter field names, do not alter tab name. If you do, and it doesn't work, do not call support :)"
- Tab Name:** The word "Proposal Header Tab" is written in large, bold, red text with a white outline across the grid.
- Bottom Tab Bar:** Shows the "Header" tab selected, along with "Line Data", "Product Type", "UOM", and "Line of Business".

Import from Excel .xlsx

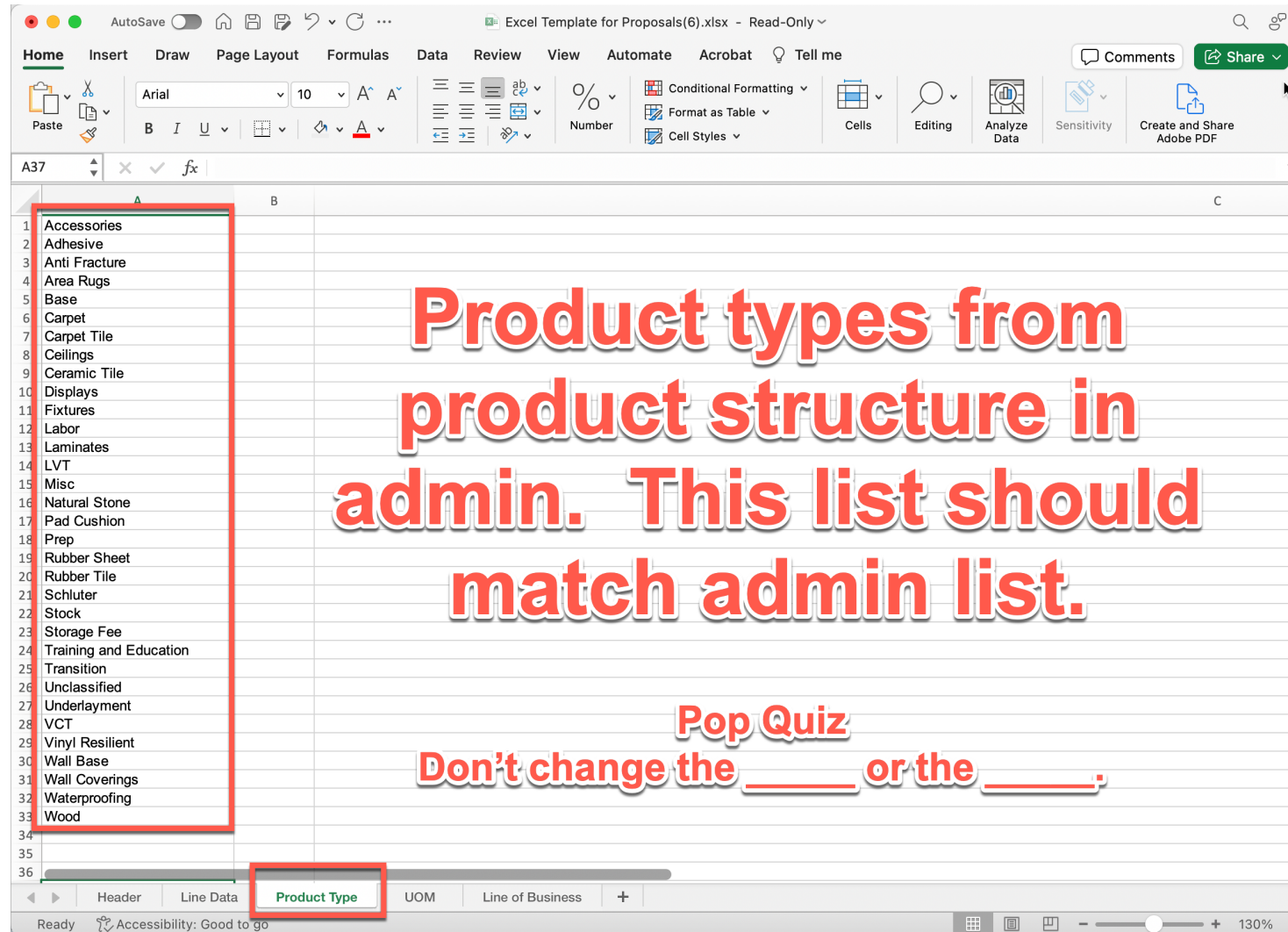


The screenshot shows the Microsoft Excel interface with the following details:

- File Name: Excel Template for Proposals(6).xlsx - Read-Only
- Active Tab: Line Data
- Header Row (Row 2):

Class	Finish ID	Product Type	S Quan	W Quan	Unit	Length	Width	Style Name/Labor Description	Color Name	Area	Freight	Cost	Sell	Customer Notes	Labor Notes	PO Notes
-------	-----------	--------------	--------	--------	------	--------	-------	------------------------------	------------	------	---------	------	------	----------------	-------------	----------
- Callout Box Text: "Do not alter header names, do not alter tab name. You can create as many rows of data beneath the columns as necessary and the column headers can be re-arranged."

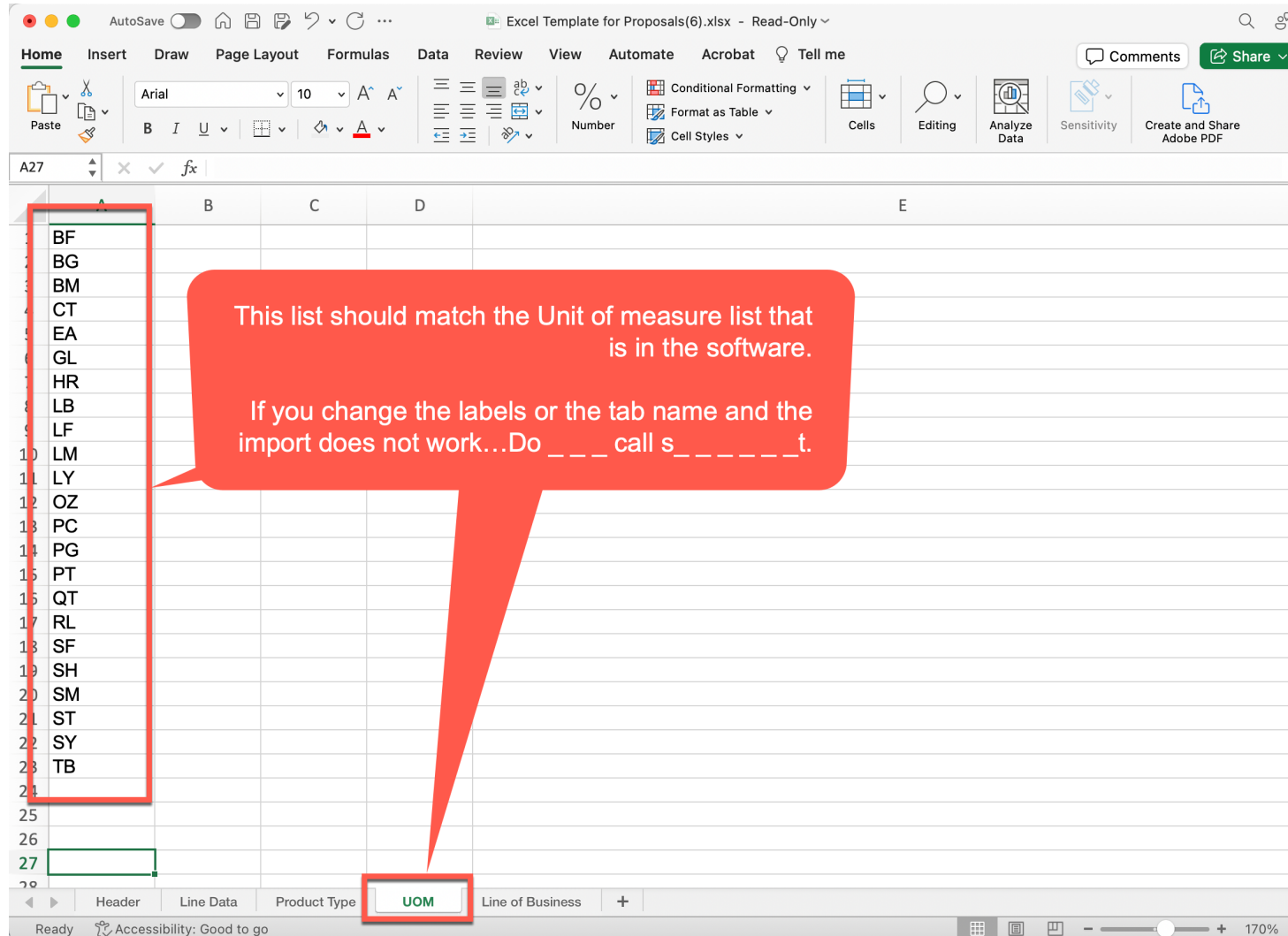
Import from Excel .xlsx



Product types from product structure in admin. This list should match admin list.

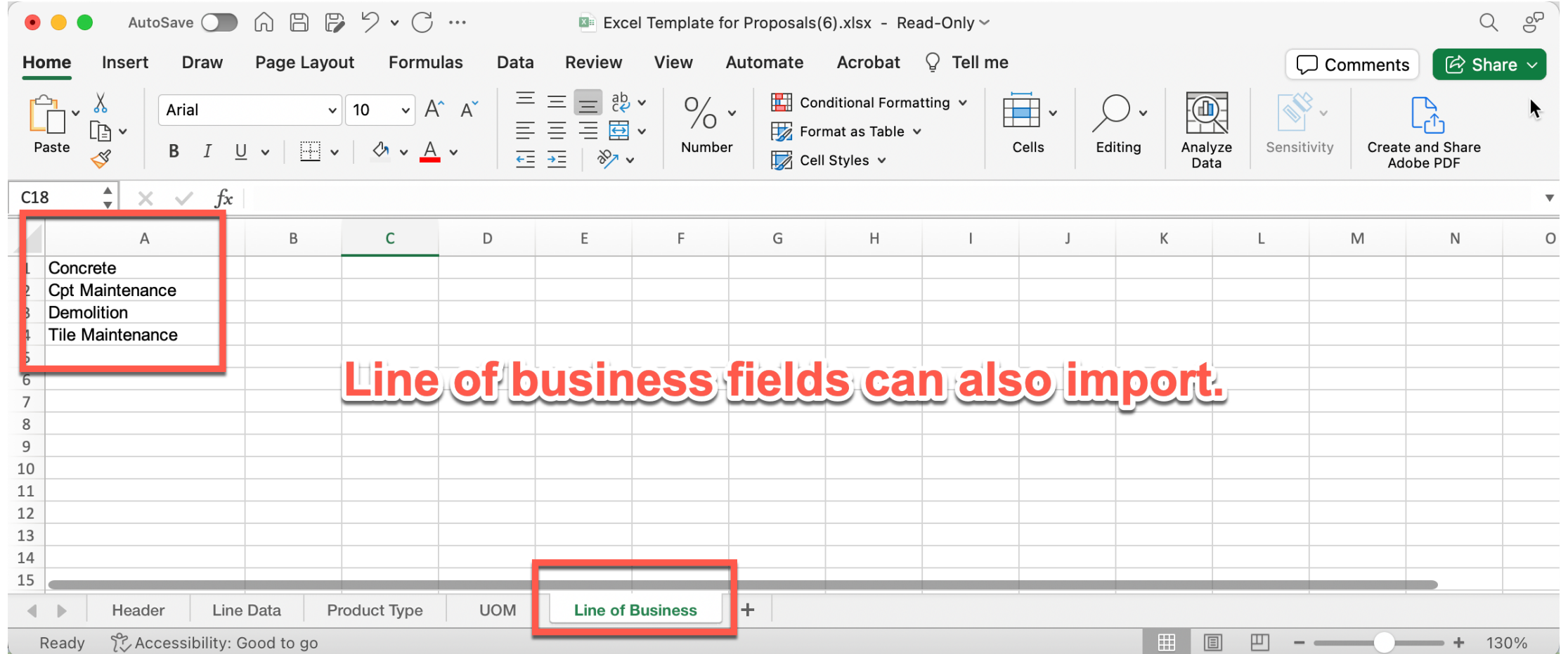
Pop Quiz
Don't change the _____ or the _____.

Import from Excel .xlsx



The screenshot shows the Microsoft Excel interface. The active sheet is 'Excel Template for Proposals(6).xlsx' in 'Read-Only' mode. The ribbon is set to 'Home'. In the worksheet, column A contains a list of unit codes from row 4 to row 23: BF, BG, BM, CT, EA, GL, HR, LB, LF, LM, LY, OZ, PC, PG, PT, QT, RL, SF, SH, SM, ST, SY, and TB. A red box highlights this list. A red callout bubble points to the list with the text: 'This list should match the Unit of measure list that is in the software. If you change the labels or the tab name and the import does not work...Do ___ call s ___ t.' The bottom sheet tab is labeled 'UOM' and is highlighted with a red box. Other tabs include 'Header', 'Line Data', 'Product Type', and 'Line of Business'. The status bar at the bottom shows 'Ready' and 'Accessibility: Good to go'.

Import from Excel .xlsx



The screenshot shows the Microsoft Excel interface. The title bar indicates the file is 'Excel Template for Proposals(6).xlsx - Read-Only'. The ribbon includes tabs for Home, Insert, Draw, Page Layout, Formulas, Data, Review, View, Automate, Acrobat, and Tell me. The Home tab is active, showing options for Paste, font settings (Arial, size 10), and paragraph alignment. The spreadsheet grid shows columns A through O and rows 1 through 15. In column A, rows 1-4 contain the text: 'Concrete', 'Cpt Maintenance', 'Demolition', and 'Tile Maintenance'. A red box highlights this area. At the bottom, the sheet tab bar shows 'Header', 'Line Data', 'Product Type', 'UOM', and 'Line of Business', with the latter highlighted by a red box. A large red text overlay with a white outline reads 'Line of business fields can also import.' The status bar at the bottom shows 'Ready', 'Accessibility: Good to go', and a zoom level of 130%.

Spec Intel Integration



Learn more later this morning and in breakout session 1 today

Sales and use tax



- Provision for taxes always paid to source
- Changes to how Use tax COGS changes are updated
- Option to use budgeted cost, or verified cost for Use tax

Learn more in breakout session 3 today

Mission Control Enhancements



SA1-10

File Edit View Insert Format Records Scripts Window Help

Return Show All Export Filters Refresh Statuses Project Management

Mission Control

Project #	Job #	Date	Job Name	Job Description	Sales Person	Start Date	GPM	+Budget	Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
9104	2128	7/17/2017	Turner		Davey Jones	4/17/2019	25.43%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2129	2129	7/17/2017	Omni Carlsbad		Davey Jones		26.60%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2132	2132	7/19/2017	Turner									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2133	2133	7/20/2017	Mannington Commercial									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2133	2133-1	7/20/2017	Mannington Commercial									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2135	2135	7/21/2017	Turner									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2136	2136	7/24/2017	Capitol Investments									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2137	2137	8/1/2017	Lumina									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2139	2139	8/1/2017	Lumina									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2140	2140	8/1/2017	Lumina									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2141	2141	8/2/2017	Capitol Partners									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2142	2142	8/8/2017	Turner									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2142	2142-1	8/8/2017	Turner									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2144	2144	8/8/2017	Turner									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2144	2144-1	8/8/2017	Turner									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2146	2146	8/22/2017	Turner									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2146	2146-1	8/22/2017	Turner									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2148	2148	8/30/2017	Lumina									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2149	2149	8/30/2017	Lumina									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2150	2150	8/31/2017	Lumina									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2151	2151	8/31/2017	Lumina									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
RKN2145	2154	9/7/2017	Lumina									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
RKN2145	2154-1	9/7/2017	Lumina									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2158	2158	9/13/2017	Lumina									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2160	2160	9/20/2017	Capitol Partners									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2161	2161	9/20/2017	Capitol Partners									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2162	2162	9/25/2017	JJJ Architects									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2164	2164	9/28/2017	JJJ Architects									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2166	2166	9/29/2017	Turner									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2166	2166-1	9/29/2017	Turner									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2166	2166-2	9/29/2017	Turner									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2169	2169	10/3/2017	ELITE Construction									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2169	2169-1	10/3/2017	ELITE Construction									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2173	2173	10/9/2017	Capitol Partners									Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2175	2175	10/9/2017			Davey Jones		-99.99%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2176	2176	10/9/2017	Capitol Partners		Davey Jones		31.39%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2177	2177	10/12/2017	Omni Carlsbad		Davey Jones		26.60%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid
2178	2178	10/12/2017	JJJ Architects		Davey Jones	12/7/2017	20.79%		Locked	Ordered	Work Order	Received	Scheduled	Delivered	Verified	Invoiced	Comm Set	Comm Paid

Close

Legend Status Complete Status In Progress Status Incomplete Unselected / No Preference

Locked Verified

Ordered Invoiced

Work Order Comm Set

WO Accepted Comm Paid

Received Closed

Scheduled Paid

Delivered Job Start Confirmed

Install Complete Required

Rev Rec: % Comp. Comp. Contract All

Store: _____

Sales Person: _____

Line of Business: _____

Written Date Range: _____ to _____

Job Start Date Range: _____ to _____

Job Close Date Range: _____ to _____

Budget: _____

Classification: _____

Reset Limit Filter Extra Filter Apply Filter

Applied Filters

Save current filter: Filter Name Save

Load a saved user filter: Select a filter

Load Month-End filter: Select a filter

Learn more in
breakout
session
6 tomorrow.

Job Start Date and Confirmation



SA1v10

File Edit View Insert Format Records Scripts Window Help

Delete Find Find All Print Transfer List View Change Order Unlock Template Sessions

Locked Ordered **Work Order** Received Scheduled Delivered Verified Invoiced Comm Set Comm Paid Closed % Comp Job Start Date Install Complete

Job Continental

Job Start Date: 9/27/2023

Sold To: Holiday Inn, 742, 17892 Aguamiel Road, SAN DIEGO, CA 92127

Ship To: Holiday Inn, 17892 Aguamiel Road, SAN DIEGO, CA 92127

POV10 (ASH-PS-SALES)

Entry CRM Activites Upgrades Bundle Status

Filter Mat / Lab Filter Product Type Filter Procurement

Type	S.Quan	W.Quan	Unit	Length	Width	ID#	Product Desc
Carpet	Materials	10255	SY			2795	Bentley Kir
Line# 1	Labor	10255	SY	12			Carpet Ins

Purchase Order Continental

1 of 3 730

Ordered

Job Start Date: 9/27/2023

Order by Date: 9/20/2023

Order Date: 9/20/2023

Ship Date: [Calendar]

Expected Date: 9/26/2023 [Will Advise]

Production Date: [Calendar]

Ordered By: Davey Jones

Ordered From: [Calendar]

Sales Person: Davey Jones

Purchase Order Information

Sidemark: Holiday Inn

PO #: 4987-2751

Job / Contract #: 2751

Project #: 2751

Ship Via: [Calendar]

B of L # Trailer #: [Calendar]

PO Type: [Calendar]

Ship To: Drop ECLR Flooring

Line Of Business: [Calendar]

Vendor: BENTLEY PRINCE STREET

Account #: 137

Phone #: 800-423-4709 Ext

Fax #: 626/336-8143

Reference #: 2525

Ship Payment: [Calendar]

Store: 1 Continental

Entry Person: Davey Jones

PO Items Private Job Mail Receive As Ordered CRM Activites Documents More Lines

Product Type	Quantity	Unit	Product ID	Style / Model #	Order Size	Item Size	Item Cost	Tax Cost	Fr1 Cost	Fr2 Cost	Total	Status	Exp Date	Actions
Carpet	10255	SY	2795		120" x 76913"		\$10.50	\$1.84	\$0.48		\$131,436.28	Primary		
			Description	Kings Road 8kr4200001								Ordered		

New verified status on a PO

POv10 (ASH-PS-SALES)

File Edit View Insert Format Records Scripts Window Help

New Delete Find Find All List View Print

Ordered Arrived % Comp **Verified**

Purchase Order

Purchase Order Information

Sidemark	Holiday Inn			
PO #	4987-2751			
Job / Contract #	2751			
Project #	2751			
Ship Via				
B of L # Trailer #				
PO Type				
Ship To:	Drop	ECLR Flooring		

PO Items Private Job Mail Re

Product Type

Find Purchase Order

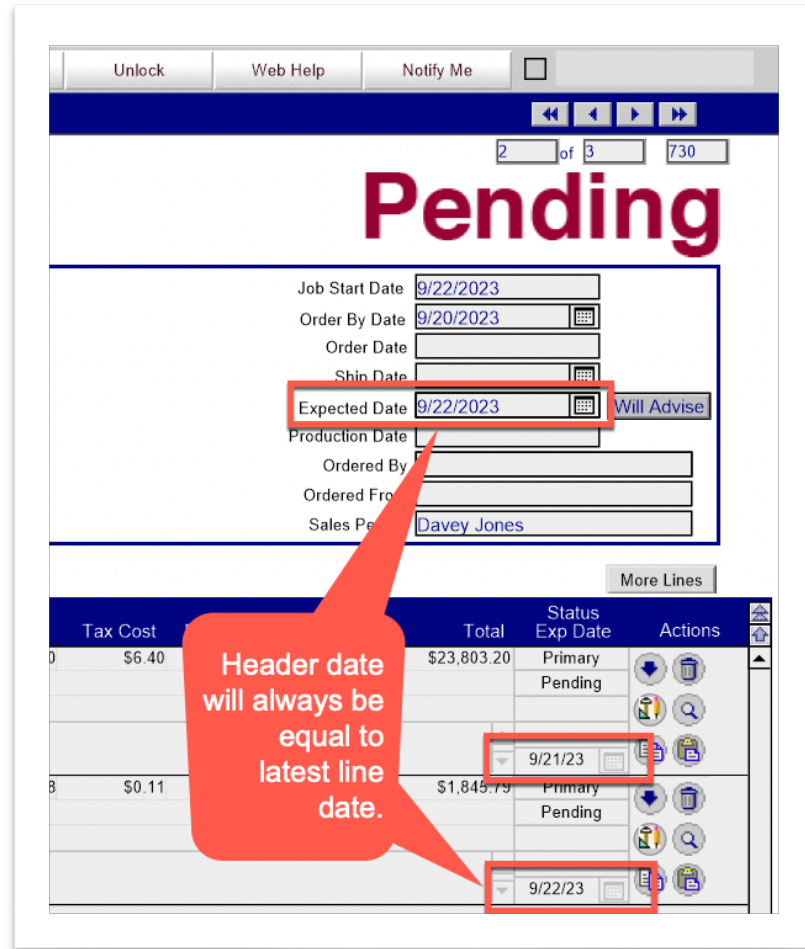
Enter PO Information

Sidemark	Sales Person	PO#	Job #	Contract #	Verified
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vendor	Reference #	Order Date	Order By Date	Expected Date	Not Verified
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Verified
Store # / Name	Status	Ship Date	Ship To	Ship Via	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Entry Person	Ordered By	B of L #	Project #	Information	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Enter Product Information

Type	Product ID	Product Description	Style / Model Number	Color / Item Number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Notify me enhancements



Unlock Web Help Notify Me

2 of 3 730

Pending

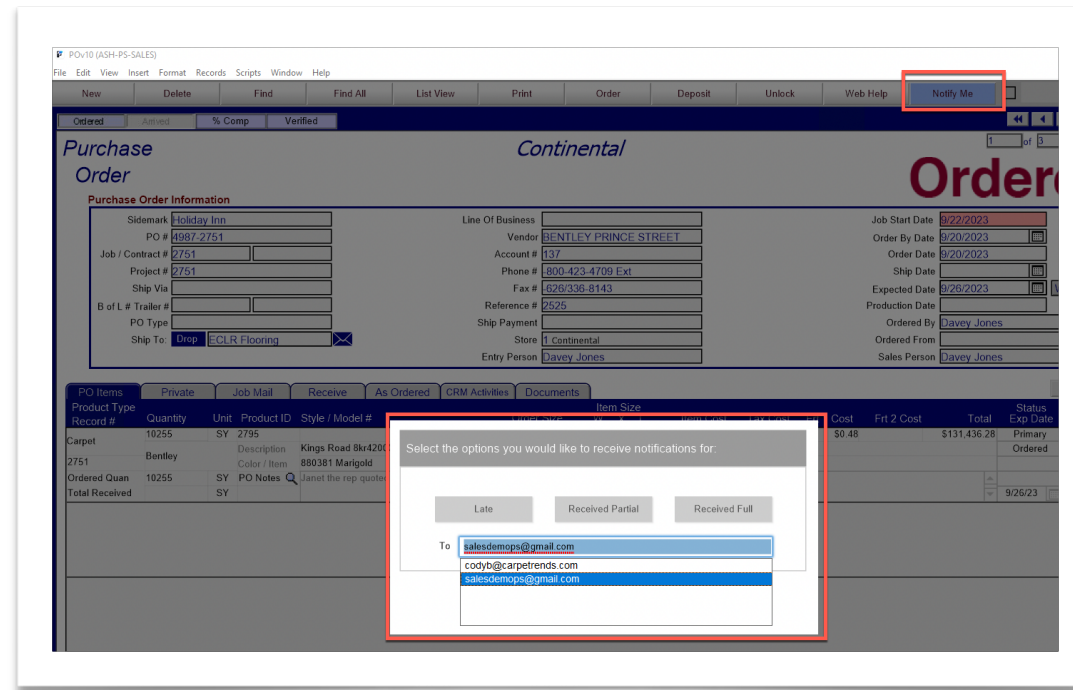
Job Start Date: 9/22/2023
 Order By Date: 9/20/2023
 Order Date:
 Ship Date:
 Expected Date: 9/22/2023 Will Advise
 Production Date:
 Ordered By:
 Ordered From:
 Sales Person: Davey Jones

More Lines

Tax Cost	Total	Status	Exp Date	Actions
\$6.40	\$23,803.20	Primary	Pending	
			9/21/23	
\$0.11	\$1,845.79	Primary	Pending	
			9/22/23	

Header date will always be equal to latest line date.

- The greatest enhancement is that it works now. :) 2FA
- Email notifications are more detailed
- Each line on a PO can have a different expected date of delivery
- Status is determined on a line by line basis and not overall PO Status



POV10 (ASH-PS-SALES)

File Edit View Insert Format Records Scripts Window Help

New Delete Find Find All List View Print Order Deposit Unlock Web Help Notify Me

Ordered Advanced % Comp Verified

Purchase Order Continental Order

Purchase Order Information

Sidemark: Holiday Inn Line Of Business:
 PO #: 4987-2751 Vendor: BENTLEY PRINCE STREET
 Job / Contract #: 2751 Account #: 137
 Project #: 2751 Phone #: 800-423-4709 Ext
 Ship Via: Fax #: 828/336-8143
 B of L # Trailer #: Reference #: 2525
 PO Type: Ship Payment:
 Ship To: Drop ECLR Flooring Store: Continental
 Entry Person: Davey Jones

Job Start Date: 9/22/2023
 Order By Date: 9/20/2023
 Order Date: 9/20/2023
 Ship Date:
 Expected Date: 9/26/2023
 Production Date:
 Ordered By: Davey Jones
 Ordered From:
 Sales Person: Davey Jones

PO Items Private Job Mail Receive As Ordered CRM Activities Documents

Product Type	Quantity	Unit	Product ID	Style / Model #	Item Size	Cost	Frt 2 Cost	Total	Status
Carpet	10255	SY	2755			\$0.48		\$131,456.28	Primary
				Kings Road Bkr420					Ordered
				880381 Marigold					
				Color / Item					
				PO Notes Q					
				Cancel the rep quotes					
									9/26/23

Select the options you would like to receive notifications for:

Late Received Partial Received Full


To: salesdemops@gmail.com
 codyb@carpetrends.com
 salesdemops@gmail.com


Omit side mark and will advise on PO print




Print Options ? Web Help


Select From The Print Options Below


Current PO


Found PO's Grouped

Constrain By Shipper


Job Mail


As Ordered PO

Print Freight

Print with Freight
 Print without Freight

Language Print Option:

Additional Print Options

Print Found Records
 Print Metric
 Email
 Omit Sidemark
 Omit Will Advise

Cancel

Install Complete Status



Order	Unlock	Template	Sessions	Export	Refresh
Closed	% Comp	Job Start Date	Install Complete	Required	Mission Control

Job Start Date	<input type="text" value="9/27/2023"/>	Project #	<input type="text" value="2751"/>
Owner	<input type="text"/>	Job #	<input type="text" value="2751"/>
General Contractor	<input type="text"/>	Customer PO	<input type="text"/>
Architect	<input type="text"/>	Date	<input type="text" value="9/20/2023"/>
Designer	<input type="text"/>	Contract #	<input type="text"/>
Project Manager	<input type="text"/>	Store	<input type="text" value="1 Continental"/>
Accounting Manager	<input type="text"/>	Entry Person	<input type="text" value="Davey Jones"/>
Line Of Business	<input type="text"/>	Sales Person 1	<input type="text" value="Davey Jones"/>
Job Description	<input type="text"/>		<input type="text" value="100%"/>
		Sales Person 2	<input type="text"/>

Ticket	Forms	Project	Sitefotos	Project Management
--------	-------	---------	-----------	--------------------

Profits Tab Improvements

Profits												
Filter Job Progress												
Filter Job Costs												
Clear Filtering												
Show Parameters												
Show Budget												
Entry												
Actual												
Description	Color / Item Number Area	Kits	Actions	Unit Cost	Freight 1 Cost	Freight 2 Cost	Tax Cost	Over Head	Act Cost Landed	Act Cost Extended	Actual GPM	Variance From Orig. Bdgt
8kr420000t	880381 Marigold	O		\$10.00	\$0.48		\$1.60					
et Glue Down				\$2.75								
		KIT										
4 Gallon 4099 (60 Yrds Per	4 Gallon	D		\$40.00			\$6.40					
cture 1/8" Gauge	51803 Pearl White	D		\$0.68			\$0.11					
Standard				\$0.50				\$0.75	\$1,012.50	-11.94%	V	-\$337.50
		KIT										
Thin Spread - Vct Adhesive	4 Gallon	A		\$43.96			\$7.03					
oor Prep				\$30.00				\$30.00	\$75.00	25.00%	V	
Finish	10 Lbs	H		\$16.99			\$2.72					

- Color Changes
- Changes to Projected
- Changes to Actual
- Drill Downs

Learn more in breakout session 5 tomorrow

Email Security and 2FA



Google Workspace

- Significant uptick in support tickets
- Limiting to Office 365 and Google Workspace only. (Sorry AOL, Hotmail and Juno lovers)
- Will not work with Exchange
- Requires the latest update. We will not troubleshoot older versions.

Email directly from Proposal or Job



New Delete Find Find All Isolate Print Transfer List View C

Template Sale N/A

Proposal

Proposal For Contact / Phone

JIM BILLINGS INTERIORS

7846 LOOKOUT DRIVE

LA JOLLA CA 92037

Fax 858 5678901

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

Entry CRM Activities Upgrades Bundle Alternates Profits

Filter Mat / Lab Filter Product Type

Type	S.Quan	W.Quan	Unit	Length	ID#	Manufacturer / Product Description
Carpet	100		SY		2794	Bentley Kings Road 8

File Edit View Insert Format Records Scripts Window Help

Delete Find Find All Print Transfer

Unlocked Ordered Work Order Received Scheduled Delivered Verified

Job

Sold To Contact / Phone Ship To

JIM BILLINGS INTERIORS

586

7846 LOOKOUT DRIVE

LA JOLLA CA 92037

Fax 858 5678901

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

Entry CRM Activities Upgrades Bundle Status Profits

Filter Mat / Lab Filter Product Type Filter Procurement Filter Job Progress

Type	S.Quan	W.Quan	Unit	Length	ID#	Product Description
Carpet	100		SY		2391	BENTLEY Ann Taylor
Line# 1				12		

Notes Install

Choosing job attachments for email



Delete Find Find All Print Transfer List View Change Order Lock Template Export Refresh

Unlocked Ordered Work Order Received Scheduled Delivered Verified Invoiced Comm Set Comm Paid Closed N/A Job Start Date Install Complete Required

Forms Continental

Project #
 Job # Customer PO
 Date Contract #
 Store Entry Person
 Sales Person 1
 Sales Person 2

Sold To **Contact / Phone**

JIM BILLINGS INTERIORS
586

7846 LOOKOUT DRIVE

LA JOLLA CA 92037

Fax 858 5678901

Ship To **Community / Plan**

Name JIM BILLINGS INTERIORS

Address 7846 LOOKOUT DRIVE

Lot / Suite #

City, State, Zip LA JOLLA CA 92037

Phone Start Date 4/18/2023

Entry CRM Activites Upgrades Bundle Status Profits Chg Orders Job Mail Pick Ticket **Forms** Project Project Management

DOCS

Type	Description	Attachment (Click to Add / View)	Created At
		PSXLSX_Template.xlsx	Sale # 2611
		Job 2629 PO Status.pdf	Sale # 2611

Forms

Form Name	Date	Created By	Notes
G702/703	9/21/2023	Davey Jones	Application #1

Choosing job attachments for email



SC1v10 (ASH-PS-SALES)

File Edit View Insert Format Records Scripts Window Help

A screenshot of an email client interface. The window title is "Email". The subject line is "Request Read Receipt". The "To" field contains "jim@jbl.com", the "Cc" field contains "salesdemops@gmail.com", and the "Subject" field contains "Sales Contract Attached". An "Attach" menu is open on the right side of the window, showing three options: "Browse...", "Select Forms", and "Select Documents". The "Select Forms" option is highlighted with a red border, and the "Select Documents" option is highlighted with a purple border. The "Email Text" field is empty.

Choosing job attachments for email



Attach Documents

Forms

Filter by Status



All

Form Name	Date	Created By	Notes	Status	Include
G702/703	9/21/2023	Davey Jones	Application #1	<input type="checkbox"/> Resolved <input type="checkbox"/> Open	<input type="checkbox"/>

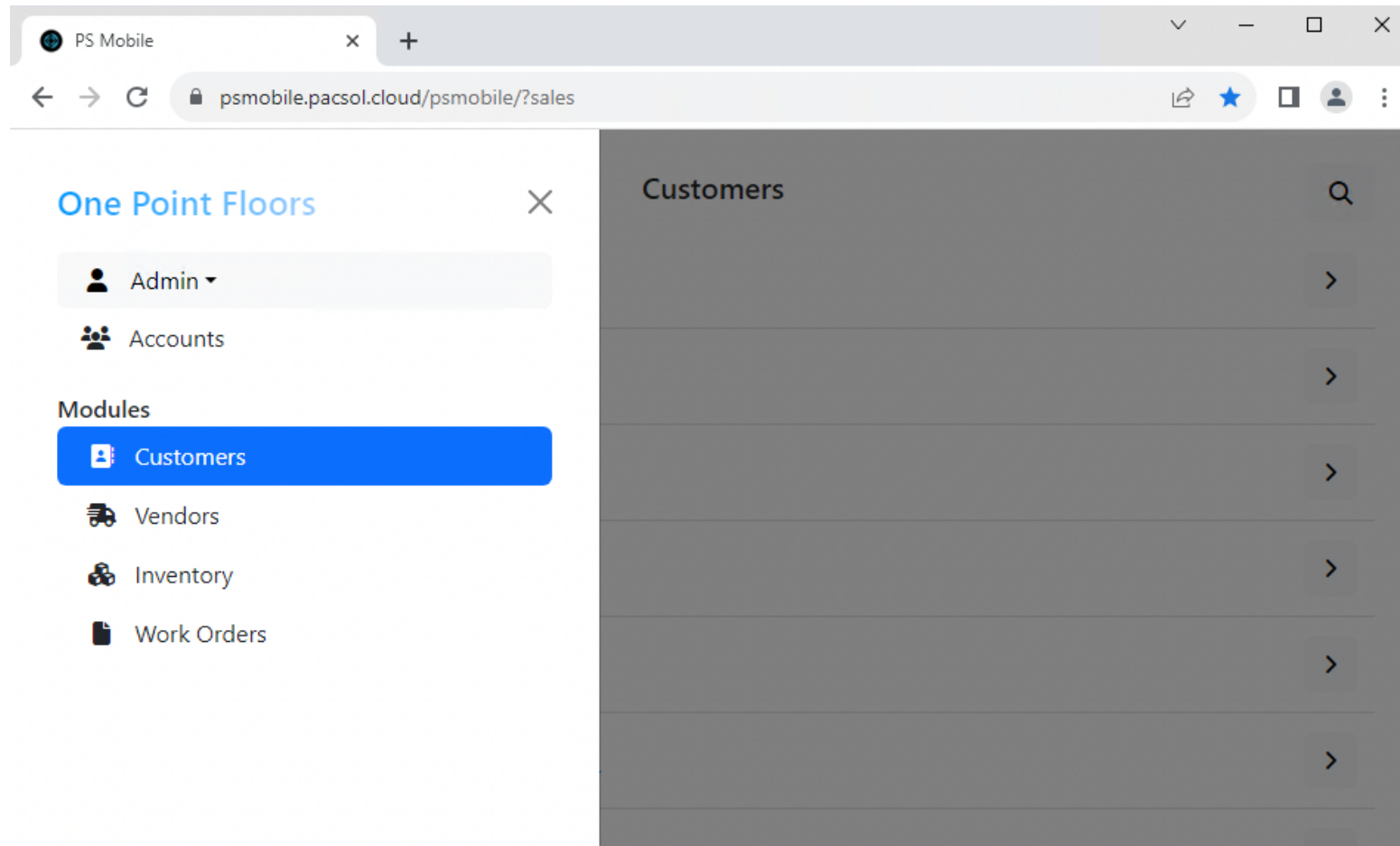
Choosing job attachments for email



Documents

Type	Description	Attachment	Added By / Date Time	Include
		 PSXLSX_Template.xlsx	Davey Jones 9/21/2023 7:56:20 PM	<input type="checkbox"/>
		 Job 2629 PO Status.pdf	Davey Jones 9/21/2023 7:55:56 PM	<input type="checkbox"/>

PS Mobile Improvements



Learn more in
breakout
session
6 tomorrow.

Update button



QT1v10 (ASH-PS-SALES)

File Edit View Insert Format Records Scripts Window Help

New Delete Find Find All Isolate Print Transfer List View Copy Compress **Update** Template Lock

Template Sale % Comp

Proposal Continental

Proposal For **Contact / Phone**

Holiday Inn
17892 Aguamiel Road
SAN DIEGO CA 92127

Ship To **Community / Plan**

Holiday Inn
17892 Aguamiel Road
SAN DIEGO CA 92127

Opportun
O
General Contra
Arch
Desi
Project Man:
Accounting Man:
Job Start I
Line Of Busir
Job Descrip

Entry CRM Activities Upgrades Bundle Alternates Profits Job Mail Forms Sitefotos Project

Filter Mat / Lab Filter Product Type


Type	S.Quan	W.Quan	Unit	Length	Width	ID#	Manufacturer / Product Description	Color / Item Number
Carpet	Materials	10000		SY		2795	Bentley Kings Road 8kr420000t	880381 Marigold
Line# 1	Labor	10000		SY	12		Carpet Install Carpet Glue Down	

Notes Installation Notes Rep quoted 10, dont overpay.
Customer Installer PO


- No longer updates everything
- Can update material independently from labor (Labour)

Status tab boxes are printable




PURCHASE ORDERS CREATED FOR JOB# 2641  Expanded View


Order Date	Exp. Date	PO #	Status	Vendor
3/21/2022	3/21/2022	4792	Arrived	TRI-WEST,LTD
9/1/2022	9/13/2022	4843-2641	Arrived	BENTLEY PRINCE STREET
9/1/2022	9/1/2022	4844-2641	Arrived	TRI-WEST,LTD

INSTALLER WORK ORDERS CREATED FOR JOB # 2641  Expanded View

Date	Install Date	WO #	Status	Invoice Amount	Balance

INVOICES CREATED FOR JOB # 2641  Expanded View

Date	Invoice #	Status	Adjusted Total	Payments	Balance

DEPOSITS POSTED FOR JOB # 2641  Expanded View

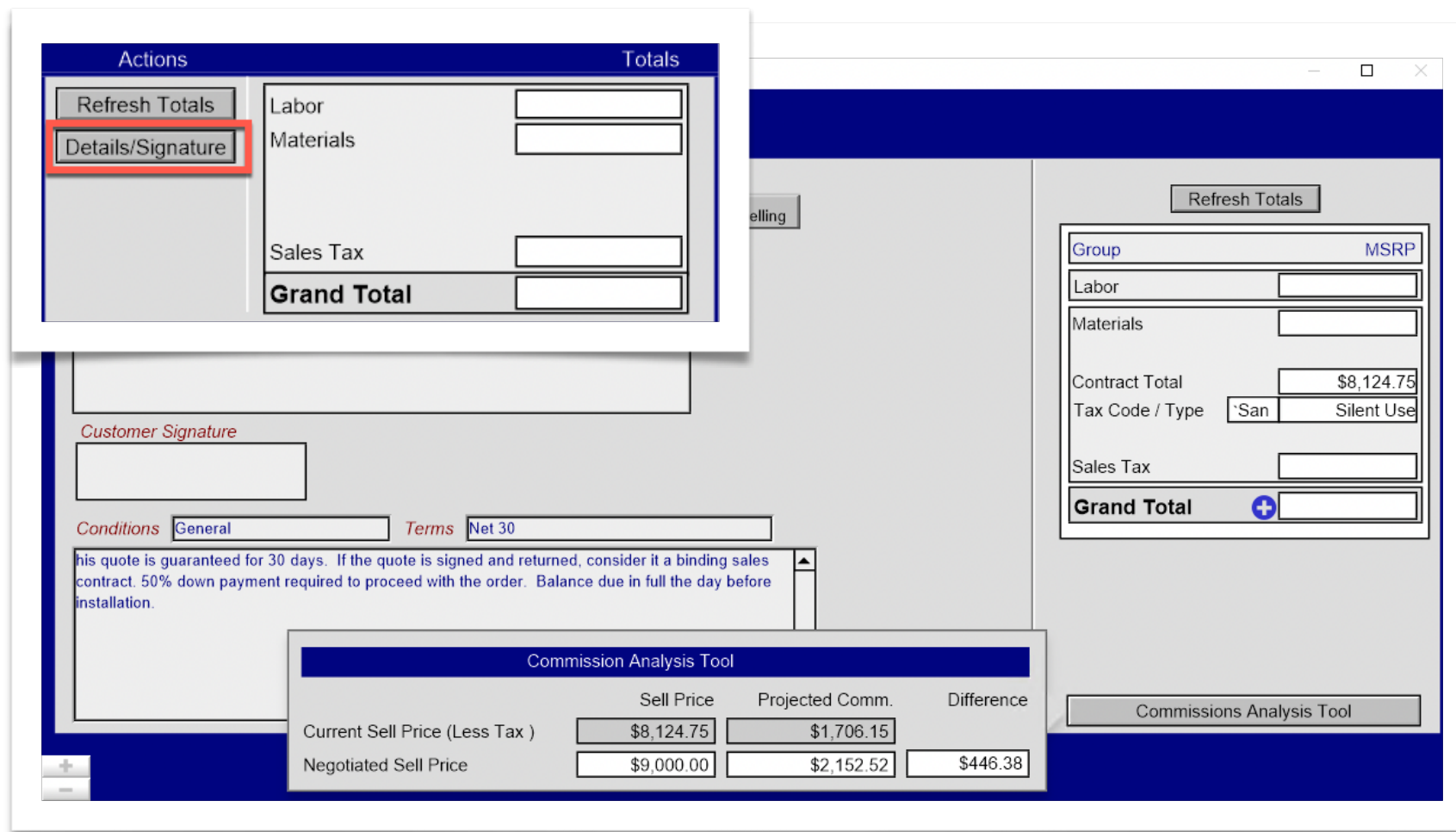
Date	Payment #	Remitter	Amount

COMMISSION AND CLOSE DETAILS FOR JOB # 2641 Expanded View

Commission Details		Close Information	
Commission Set Date	<input type="text"/>	Sale Closed Date	<input type="text"/>
Commission Paid Date	<input type="text"/>		

TOTAL BILLED TOTAL DUE

Commission Analysis Tool

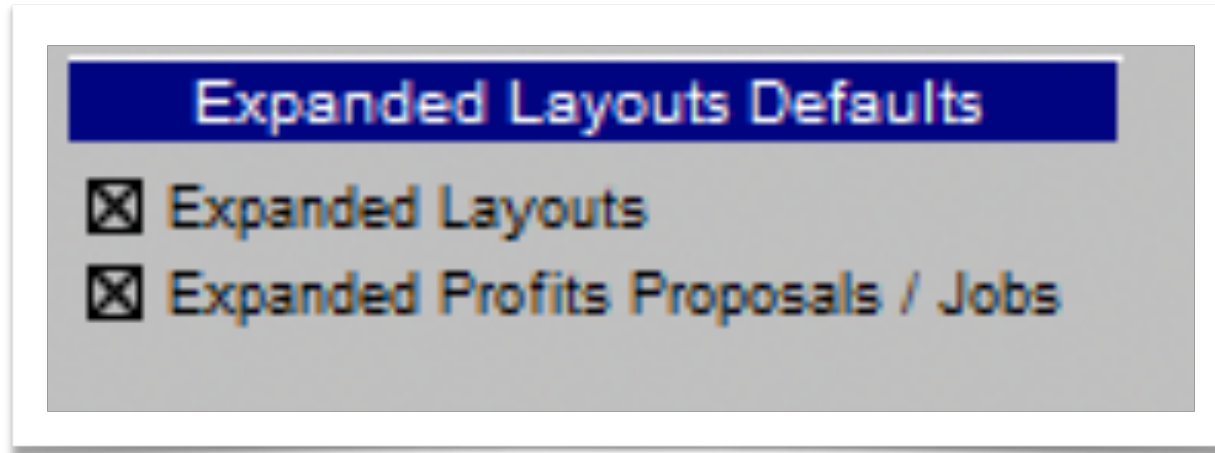


The screenshot displays the 'Commission Analysis Tool' interface. A 'Totals' panel on the right shows input fields for Labor, Materials, Sales Tax, and Grand Total. A 'Details/Signature' panel on the left contains a 'Refresh Totals' button and a 'Details/Signature' button (highlighted with a red box). Below this, there are fields for 'Customer Signature', 'Conditions' (set to 'General'), and 'Terms' (set to 'Net 30'). A text area contains the following text: "his quote is guaranteed for 30 days. If the quote is signed and returned, consider it a binding sales contract. 50% down payment required to proceed with the order. Balance due in full the day before installation." At the bottom, a 'Commission Analysis Tool' window is open, displaying a table with the following data:

	Sell Price	Projected Comm.	Difference
Current Sell Price (Less Tax)	\$8,124.75	\$1,706.15	
Negotiated Sell Price	\$9,000.00	\$2,152.52	\$446.38

- Available in Details/ Signature @ Proposal.
- Key in the new sell price and back into commission.
- Key in desired commission and back into sell price

Expanded layouts are required



- Apologies if you are still on a 1024x768 monitor
- We need the additional screen space to introduce additional functionality
- Non-expanded layouts were causing support cases due to lack of function.
- You can fill your screen or narrow the layout. Wide format monitor necessity.

Zoom levels. AKA, the “I’m over 40 feature.”

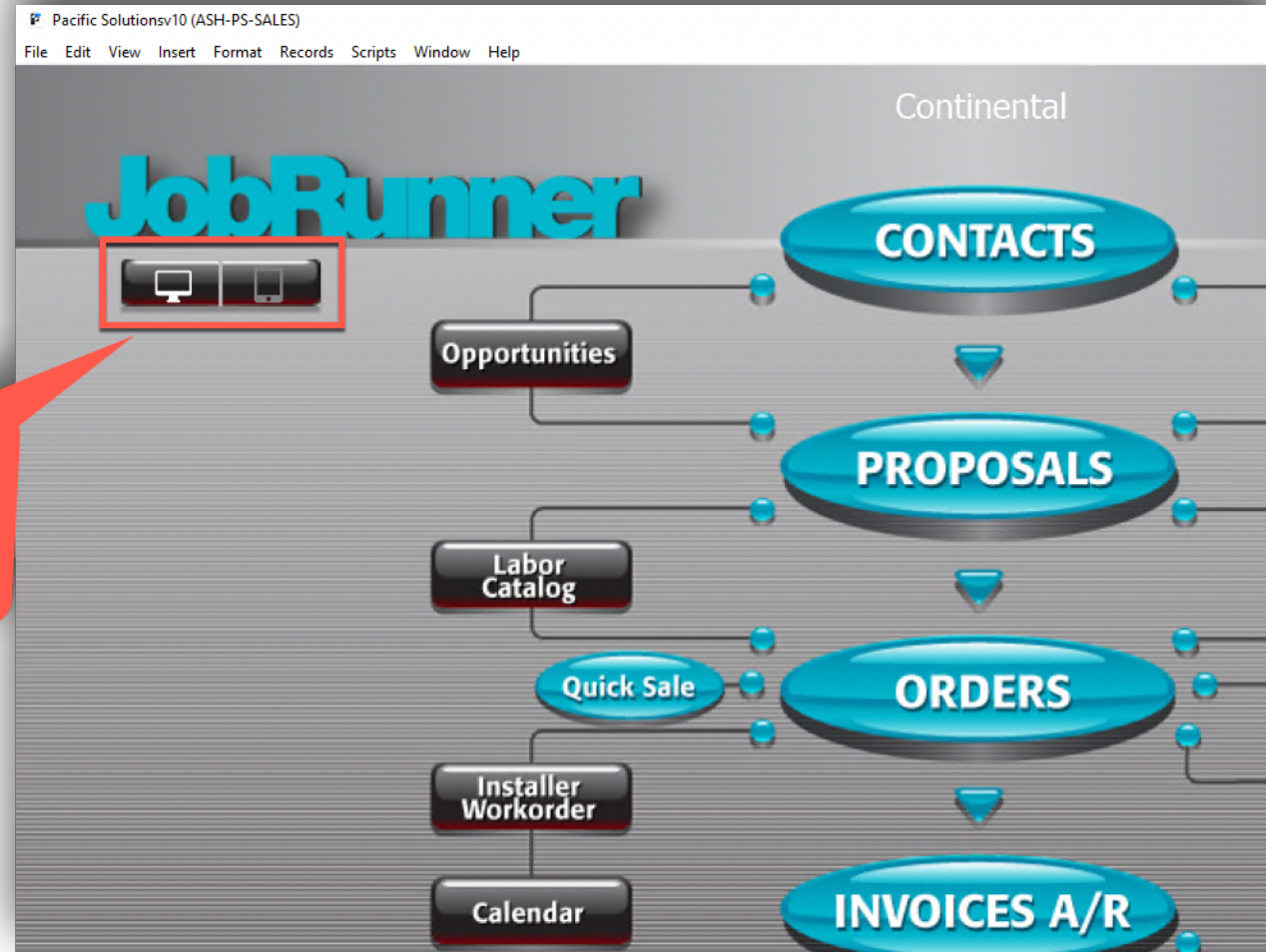


The screenshot shows the SAPv10 Personnel Setup interface. The "Access Level" tab is selected, and the "Zoom Levels" sub-tab is active. A table lists various modules with their respective zoom levels set to 150%. The "Desktop" view is selected, and the "Display: Form View Width" option is chosen.

Module Name	Zoom Level
A/P	150%
Admin	150%
Bank Accounts	150%
Bank Deposits	150%
Calendar	150%
Claims	150%
Contacts	150%
Customer Payments / Refunds	150%
Installer Workorder	150%
Inventory	150%
Invoices A/R	150%
Job Mail	150%
Journal Entry	150%

- User level, and not company wide
- Customizable per module
- Display full screen or form width. (Wide format monitor problem.)
- Note separate settings for desktop vs mobile experience

Zoom levels continued



Toggle between desktop
and mobile experience.

Attachment at payable visible at job.



New Delete Find Find All List View Copy Bills Due Quick Pay Accept Reverse Web Help

Bill

Record #

1 of 1

Hold Invoice Payment

Vendor Information

Vendor	BENTLEY PRINCE STREET	Posting Date	9/21/2023
AcctID	500001 - Purchases	Vendor Invoice Date	9/21/2023
Terms	3/30 Net 31	Invoice #	12345
Due Date	10/22/2023	Bill Amount	\$1,553.01
Voucher Memo		Not Discountable	
		Prepaid Tax 1	
		Prepaid Tax 2	

Bill Amount \$1,553.01

Acc

Payment / Posting Job Costing Misc

Payments GL Spread PO Materials PO Freight Labor Misc Notes / Activity Job Mail Recurring Documents

Type	Description	Attachment (Click to Add / View)	Added By / Date Time
AP	Attached at Payable Transaction # P8917	2023-09-06_12-54-07.png	Davey Jones 9/21/2023 6:22:43 AM

Attachment at payable visible at job.



Material Cost Analysis

Close

MATERIAL COST ANALYSIS

JOB LINE INFORMATION

Type	Product ID	Product Description	Color / Item Number	Original Quantity	Budget Inc. Ovhd.	Trending Inc. Ovhd.	Trending Unit Diff	Trending Total
Carpet	2794	Kings Road 8kr42000t	880362 Chili Pepper	75	\$12.08	\$11.68	\$0.40	\$30.24

Filter Inv Type

Vendor	PO Number	Type	Invoice #	Invoice Date	Transaction #	Verified Quan	AP Quantity	Inventory #	Unit Cost	Total Cost
BENTLEY PRINCE STREET	4990-2752	Material	12345	9/21/2023	P8917		133	7838	\$10.00	\$1,330.00
BENTLEY PRINCE STREET	4990-2752	Freight 2	12345	9/21/2023	P8917		133	7838	\$0.00	\$0.00
BENTLEY PRINCE STREET	4990-2752	Tax	12345	9/21/2023	P8917		133	7838	\$1.68	\$223.01

133

Unit Cost \$11.68 \$1,553.01

Use Tax

Overhead

Total Unit \$11.68

Attachment at payable visible at job.



Material Cost Analysis

Close

MATERIAL COST ANALYSIS


JOB LINE INFORMATION

Type	Product ID	Product Description	Color / Item Number	Original Quantity	Budget Inc. Ovhd	Trending Inc. Ovhd	Trending Unit Diff	Trending Total
Carpet	2794	Kings Road 8kr420000t						24

Filter Inv Type

Vendor	PO Number	Type	Invoice #
BENTLEY PRINCE STREET	4990-2752	Material	12345
BENTLEY PRINCE STREET	4990-2752	Freight 2	12345
BENTLEY PRINCE STREET	4990-2752	Tax	12345

Scans related to BENTLEY PRINCE STREET

Point of Origin	Description	Attachment (Click to Add / View)	Added By / Date Time
AP	Attached at Payable Transaction # P8917	 2023-09-06_12-54-07.png	Davey Jones 9/21/2023 6:22:43 AM

Close

Overhead

Total Unit

Contacts tab at Vendor file



VNDv10 (ASH-PS-SALES)

File Edit View Insert Format Records Scripts Window Help

New Delete Find Find All List View Accept Web Help Merge

Remove this Vendor from lists. 1 of 1 293

Vendor ID# 41

Vendors Accepted

Main Address Remittance Notes B2B Phone Products **Contacts** Account Info

Company Information			Account Information		
Company	BENTLEY PRINCE STREET		Vendor Type	Account #	Credit Limit
Address	PO BOX 203897		Materials	137	
City	St / Pr	Postal Code	Terms	Tax ID	Sales Person
DALLAS, TX		75320-3897	3/30 Net 31		
Country	Carrier		1099 Selection	1099 Type	
Name To Be Printed On Check (If Different Than Above)			Default GL Account	Email	
			500001 - Purchases	customer@bentleytps.com	
			Flag Account	Account History Since 8/6/2013	
			<input type="checkbox"/>	Total Purchases	Balance Owed
			Print PO w/ Freight <input checked="" type="checkbox"/>	\$6,088,577.02	\$3,328,126.86

Navigator Customer Opportunity Takeoff Proposal Orders PO Product Catalog Calendar Bills A/P

Legacy email location

Contacts tab at Vendor file



VNDv10 (ASH-PS-SALES)

File Edit View Insert Format Records Scripts Window Help

New Delete Find Find All List View Accept Web Help Merge

Remove this Vendor from lists. 1 of 1 293

Vendor ID# 41

Vendors **Accepted**

Main Address Remittance Notes B2B Phone Products **Contacts** Account Info

Company Information

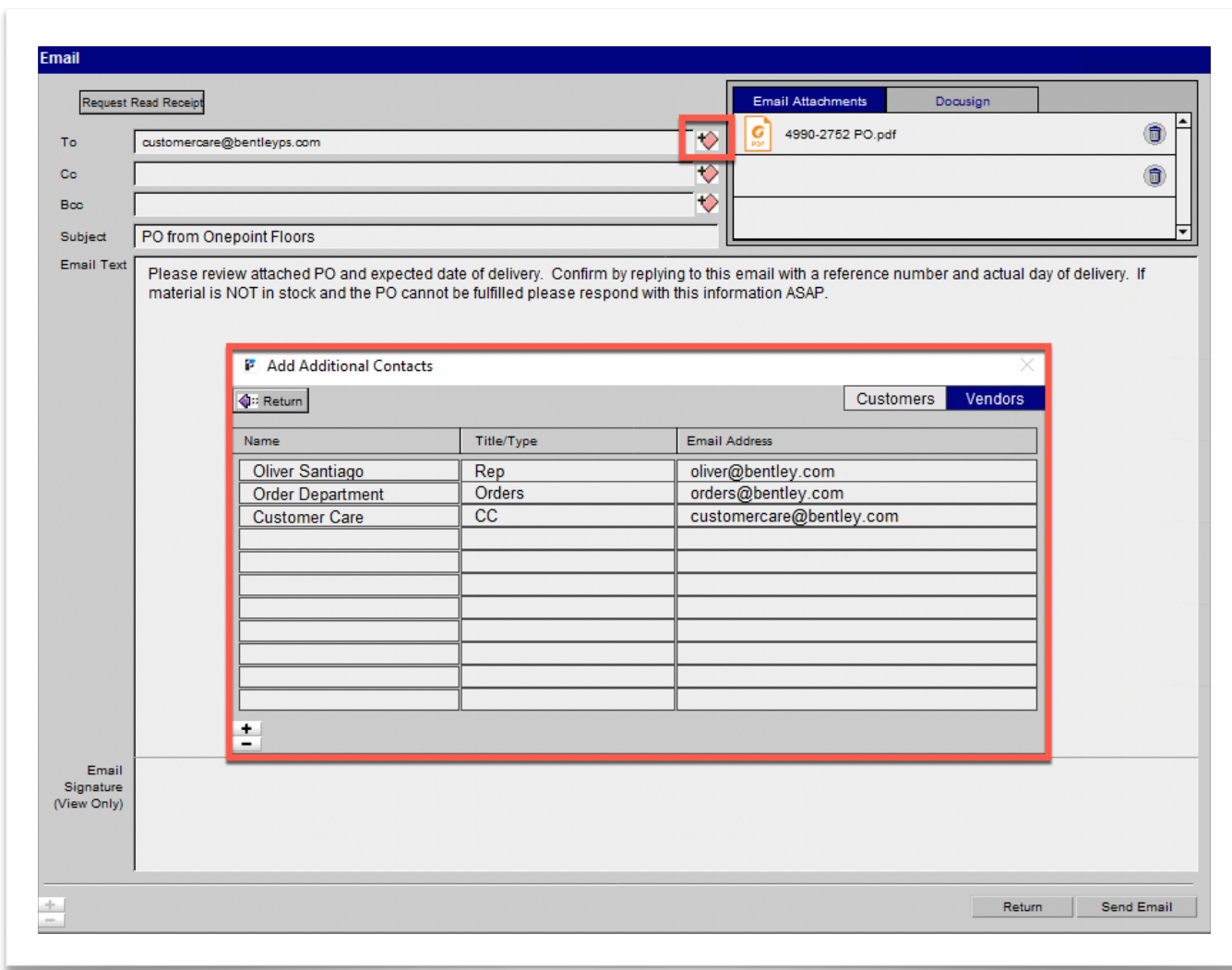
Company
BENTLEY PRINCE STREET
Address
PO BOX 203897
City St / Pr Postal Code
DALLAS, TX 75320-3897
Country Carrier
Name To Be Printed On Check (If Different Than Above)

Contact Name	Type	Phone	Email
Oliver Santiago	Rep		oliver@bentley.com
Order Department	Orders		orders@bentley.com
Customer Care	CC		customercare@bentley.com

Navigator Customer Opportunity Takeoff Proposal Orders PO Product Catalog Calendar Bills A/P

Additional points of contact behind contacts tab.

Contacts tab at Vendor file



The screenshot shows an email client window titled 'Email'. The email header includes 'To: customercare@bentleyps.com', 'Subject: PO from Onepoint Floors', and 'Email Text: Please review attached PO and expected date of delivery. Confirm by replying to this email with a reference number and actual day of delivery. If material is NOT in stock and the PO cannot be fulfilled please respond with this information ASAP.' The email attachments section shows a PDF file named '4990-2752 PO.pdf'. A red box highlights the attachment icon and the 'Add Additional Contacts' dialog box.

The 'Add Additional Contacts' dialog box has a 'Return' button and two tabs: 'Customers' and 'Vendors'. The 'Vendors' tab is selected, and the following table is displayed:

Name	Title/Type	Email Address
Oliver Santiago	Rep	oliver@bentley.com
Order Department	Orders	orders@bentley.com
Customer Care	CC	customercare@bentley.com

At the bottom of the dialog box, there are '+' and '-' buttons. The main email window also has a 'Return' button and a 'Send Email' button at the bottom right.

- Additional points of contact are selectable when sending PO's
- Not limited to PO's, can also work when emailing installer work orders.

Project management enhancements



SA1v10 (ASH-PS-SALES)

File Edit View Insert Format Records Scripts Window Help

Delete Find Find All Print Transfer List View Change Order Unlock Template Refresh

Locked Ordered Work Order Received Scheduled Delivered Verified Invoiced Comm Set Comm Paid Closed N/A Job Start Date Install Complete Required Mission Control

Job Continental

Project # 2641

Job # 2641 Customer PO
Date 9/1/2022 Contract #
Store 1 Continental Entry Person Davey Jones
Sales Person 1 Davey Jones
Sales Person 2

Sold To Contact / Phone
Holiday Inn
17892 Aguamiel Road
SAN DIEGO CA 92127

Ship To Community / Plan
Name Holiday Inn
Address 17892 Aguamiel Road
Lot / Suite #
City, State, Zip SAN DIEGO CA 92127
Phone Start Date 9/6/2022

Job Cost Master

Entry CRM Activites Upgrades Bundle Status Profits Chg Orders Job Mail Pick Ticket Forms Sitefotos **Project Management**

Classification Default

Bonded Job? Yes

Moisture Testing Complete? No

Job Site Supervisor Name Michael Mickelson

Plans Received? No

(R) Required Job Completion Date 10/31/2023

Up to 75 user added fields.

Learn more in the final General Session tomorrow afternoon.

Warehouse Management
All Warehouses

Navigator



Receive



Deliver



Bin Assignment / Lookup



Quick Pick / Quick Return



Count



Warehouse Management
Module



Many enhancements to the Warehouse Management Module.

Learn more in tomorrow morning's General Session and in Breakout 7 tomorrow.

Wasabi Cloud Storage Integration



- Online cold storage of attachments
- Reduces the footprint of FloorManager and JobRunner
- Available to all Pacific Solution's hosted or subscription clients.

Learn more in General Session #4 tomorrow morning.



Enhancements to Enterprise Financials And Enterprise Job Cost

Learn more in General Session #3 tomorrow morning.



Anticipated First Quarter 2023