Contract Office Furniture Xtensions

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ddms distribution software

June 2007 Item # H-FURNX

Contents

About Ensite Xtensions

Ensite Xtensions are features to enhance your Ensite Pro system. These features are not included in all software packages. They may require authorization, either individually or as a group.

There are Xtensions available for Customers, General Ledger, Distribution, Workflow, E-commerce, Line of Business, Contract Office Furniture, and Office Machines and Equipment.

This document details Contract Office Furniture Xtensions. These include:

- Hedberg Order Import
- Job Costing
- Project Overview
- Terms and Conditions
- P/O Categories
- Work in Progress (WIP)
- Work Order Module

Hedberg Order Import

You can create furniture orders by importing and releasing Hedberg files into Ensite Pro. When you do, the system defaults to release the order to a new project. However, you can also import and release the Hedberg order to an existing project. In the Furniture Order Entry window, click the Order Entry menu and select Hedberg Orders. The Furniture Hedberg Orders dialog box opens. The system displays the orders in the upper section of the dialog box. Click the Mark box for each order to import. To select a specific project to release the Hedberg order to, click the Project Number box. Click ... to open the Project Query dialog box and select the project to which to release the Hedberg order.

Job Costing

When creating furniture projects, you can determine how much a particular job costs. The Job Costing feature allows you to estimate how much labor cost needs to be added to a project. You can enter job costing items or hours for employees to a project. This lets you keep details for audit purposes. You can create a table of hourly rates, regular and overtime rates for an employee, with 10 categories in which to assign the hours. For example, you can use this table to track the time a designer worked on the project during a given time period. You can post cost-only items, as well by tracking the cost of additional hardware purchased for the project, for example.

Using the Job Cost Approval window, you can approve, change or delete the hours and/or cost-only items charged to a project. When you delete an item, it's status changes, but the item itself remains in the file for audit purposes. However, deleted items do not move to the ticket. Once approved, all hours and/or cost-only items flow to the ticket. Approved items and/or hours are charged against commission. Unapproved items are not.

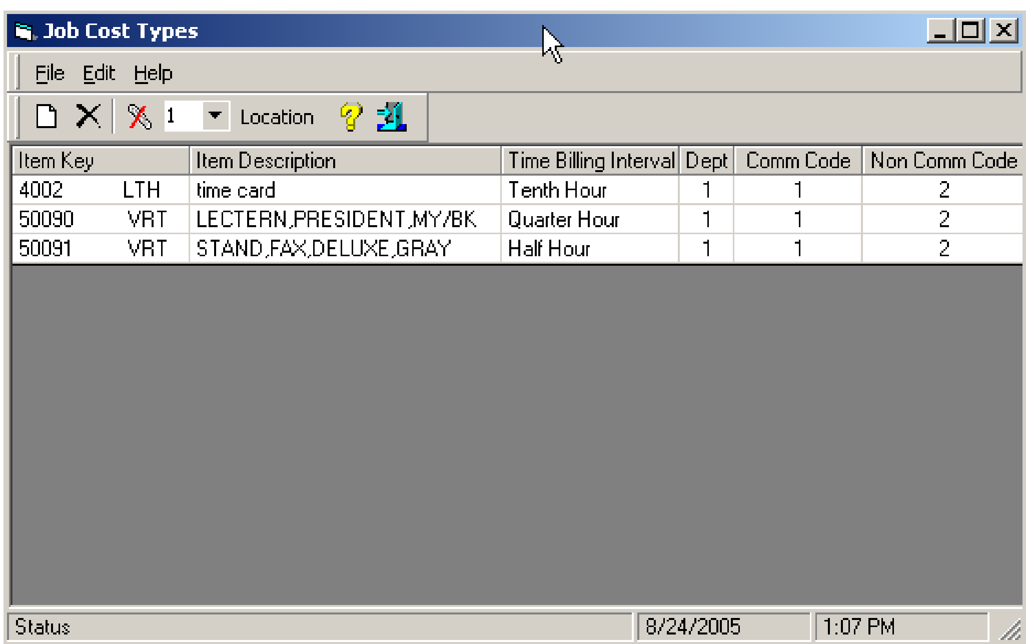
Job cost types are set up in the Furniture Parameters, shown in Figure 1. You can set up job cost types to bill in intervals of a tenth of an hour, quarter hour, half hour, or an hour. You use these parameters to assign two commission codes for each job cost type: one for commission items and the other for non-commission items. When you do, you must specify different codes so the commission and non-commission costs go on separate lines or separate tickets. In addition, if you assign different codes, they are reported separately in the Furniture Project Management window.

Once you've set up job cost types, you can assign job cost types to a salesperson in the Salesperson database.

You can use the job costing feature in three different ways:

- **Approval Cost:** When you post hours and items, the information does not flow to the project until it is approved. This lets you track the hours and items used for a particular job, while not allowing the costs to affect the project until they have been approved. In addition, you can choose which costs move to a project.

Figure 1: The Job Cost Parameters



- **Post Hours:** You can post hours used for a particular job. This lets you track your true gross profit for a project.
- **Post Items:** You can post items used for a particular job. This lets you track your true gross profit for a project.

After you approve the costs for a job and the costs move to the project, you can check the information in the Furniture Project Management window.

Note: The Furniture Job Costing feature is not included in all software packages and may require authorization. In addition, before using the job cost feature, you must set up the job cost types in the Furniture Parameters. Until you are authorized and have your job cost types set up, the Approval Cost, Post Hours, and Post Items icons in the Furniture menu do not display.

Project Overview

You can use the Project Overview window to keep track of your projects. For example, you can monitor the project's design review and client review dates, as well as keep track of the project's manager, design team manager, and install team manager.

To get started, you must set the Furniture Checklist parameters in the Parameter Editor window. You use these parameters to set up a list of additional information to be used on the project. For example, you might set up third party installation information. Once you do, the third party text appears in the Project Overview window. You can then choose a third party installation manager.

Next you can create project global information. To do this, enter the project to overview, along with the design review, client review and new meeting information. Finally, you enter the persons responsible for the project, including the project manager, design manager, and install manager.

Terms and Conditions

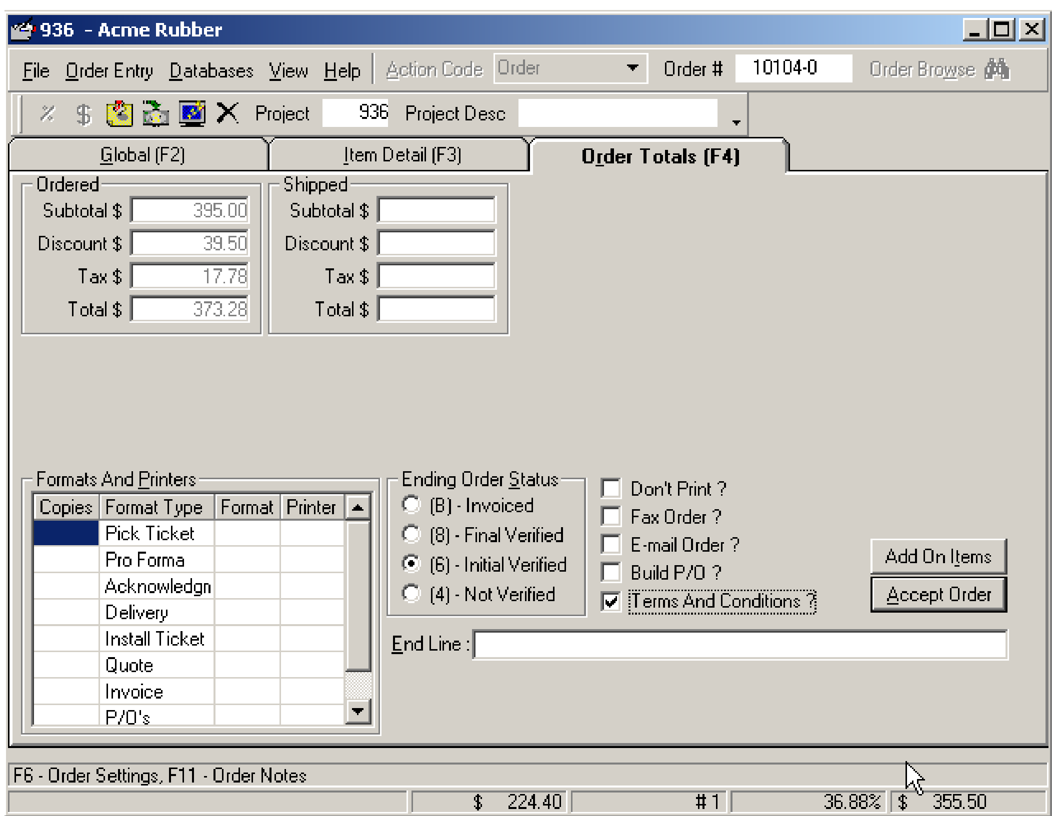
You can assign terms and conditions documents to orders. These documents detail the terms and conditions of the sale, how much you require to be paid in advance, how much of any deposit amount is forfeited and so on.

When placing an order, select the Terms and Conditions check box in the Order Totals tab, shown in Figure 2. After you accept the order, the Terms and Conditions dialog box opens so you can view the documents available. Double-click the document to assign the order. The information is written to the customer database and updates the Customer Terms and Conditions dialog box.

You use this dialog box to keep track of the terms and conditions documents on file. After the customer signs the document, you can go to the Customer Terms and Conditions dialog box and receive the document, as well as indicate who signed off and the date it was received. You can also change the existing document information. However, you cannot add new documents in this dialog box. You attach a document at the time of the sale while placing the customer's order in order entry. When a customer has a terms and conditions document set up, the system indicates this by placing the next T&C to the right of the customer's billing address in both the Customer and Order Entry windows. This immediately notifies you of the customer's status.

Before using terms and conditions, you must set up the proper documents. Store these documents in a folder on your hard drive, C:\Terms and Conditions, for example. Within this terms and conditions folder, create separate folders for each type or order you might create: one for commercial order entry, one for furniture order entry, and one for serialized (machine) order entry, C:\Terms and Conditions\Order Entry and so on.

Figure 2: The Terms and Conditions Check Box



After the documents are stored, you must set up your terms and conditions parameters in the Keyop menu. Go to Customer Parameters. Double-click Terms and Conditions. Enter the path name to a shared folder for each order entry type you use, including commercial, furniture, and machine order entry. For example, in the Furniture OE path box, you might enter the folder C:\Terms and Conditions\Furniture Order Entry. You must also enter a password in the T&C password box. In addition, you can set different terms and condition parameters for each location.

Once these parameters are set up, when you place your order, the system reads them to determine the type of order you're placing (commercial, furniture, and so on). It uses the hard drive path you've specified to retrieve and display the proper documents for the order entry type, so you can quickly choose the correct document.

P/O Categories

You use P/O Categories to create a descriptive list of purchase order categories. You create these categories in the P/O Positions dialog box in the Purchasing Parameters. You can create up to ten categories. These category positions are used in the Purchase Order Global Info box. You can access this box after you select a purchase order. Click the Purchasing menu, and select Global Information from the Global menu or press F12.

Work in Progress

This feature lets you monitor project detail as the project progresses. You can easily view cost detail at the order level. Using this information, you can view all items on a sales ticket for a project, view whether the line item is on a purchase order, or whether the item is from job costing. If a line item is on a P/O, the system lets you know whether the item has an invoice posted in accounts payable. If the posting is for a partial amount, the system also displays this information.

You can also print a copy of the Work in Progress Report which lets you compare total dollars added to the ticket against those dollars that have been posted to accounts payable and job costing. This lets you quickly determine any discrepancies that may exist. To use this feature, double-click the Furniture icon to display the Furniture menu. In the Furniture menu, select the Work in Progress icon. When the Work in Progress Limits dialog box opens, specify your limits and click Process. The Work in Progress window opens, displaying information for the limits you set.

Work Order Module

You can also enter work orders for a project. Once a project has been delivered, this feature lets you create a punch list that you can use to add comments and create replacement and repair orders. You can also dispatch, complete and close calls, and order parts. You can reopen the calls to flush parts, track time and costs. You can also monitor progress on punch lists and track repair crew performance. You can also set up the volume serial to which to save your furniture workorders. Go to the text-based (LØ) screen and enter the volume serial in the Non Mach field.