

FF&E^Z **Screens**

Design Version 4

Design/Purchasing Version 4

Vendor List

The vendor list is a resource for all projects (and orders, if applicable). You can enter manufacturers and suppliers along with special vendor types like freight companies and warehouses (used for shipping to something besides a project or another vendor).

This screen includes the features that are typical of all major data screens.

- The “Views” controls give you access to each major screen at any time (plus the project screens after a project is opened).
- Command buttons at the lower left provide all the basic functionality for adding and editing data. Specialized functions unique to a specific kind of data appear on the appropriate screen.
- If a screen includes the option to import a new list item, it always appears as a sub-function of the **Add** command button. Some screens allow you to import more than one item at a time, and these will have an “Import List” button at the main command level.
- The grid at the top of each screen includes a **Find** tool that uses the current index and a **Search** tool used to find words or phrases in a particular field. On the right, the font size of the grid can be adjusted up or down to get more rows on the screen if you have a larger monitor.
- Each major screen has a **Query** button used to set up a filter for

use in viewing records and printing reports.

- Most columns can be sorted by clicking the column heading, with the sort current order indicated in red.
- You can use the mouse wheel to scroll the list after clicking on it to get “focus” (but learning to use

the **Find** command will save more time in locating specific items).

- FF&EZ editing screens include a large number of shortcuts that make it easy to invoke editing, to enter dates, etc. Some fields have specialized right-click (context) menus that allow you to make

entries much faster, especially where a calculation is involved.

FF&EZ has a full context-sensitive Help system that is available by pressing the **[F1]** key on the keyboard. Unlike some anemic examples of software “help”, the FF&EZ Help system is the equivalent of a full, hyperlinked user manual.

Library List

The Library can be used to maintain an official master list of specifications, both fully detailed as well as schematic specs to be used as templates. This list is outside of all projects and functions as a resource from which specifications can be copied using the Import command on the project specifications screen.

The Library is used more often when you maintain either a catalog of items for sale (maintained by an office "librarian") or when you want to set up prototype specifications that include standard specifications text (boilerplate).

However, in practice, most *general* users do not use the Library for specifications because they have instant access to any previous product spec, complete object or predefined room type on the system via the **Add> Import** command on the Specification Screen, the Object Screen and the Room Screen.

FF&EZ - A Specifications Tool for Design Professionals

Library List

Vendor>	Cat #	Type	Code	Cost	Price	Lead
All-Iron, Inc.	CDX-123	CHAIR, EXECUTIVE		1200.00	1200.00	4
All-Iron, Inc.	CDX-123A	CHAIR, EXECUTIVE		1200.00	1320.00	4
Art Horizons	HBR18	Artwork, "Killarney Harbor"		53.00	63.60	0
Casa Stradivari	VLK234	TABLE, LAMP		750.00	825.00	0
ECKO International	3400	Mirror, "Europa" wall		167.92	210.00	0
Knoll International	CUSTOM	CHAIR, ARMLESS, CASTERS		250.00	275.00	5
Knoll International	D-2342	DESK, EXECUTIVE		1000.00	1100.00	0
Knoll International	KJ3-3434	DESK, EXECUTIVE, LAMINATE	CSCI	650.00	722.22	13
Shelby Williams	CE-220	CHAIR, ACTIVITY		138.19	152.01	0
Shelby Williams	A00111	CHAIR, SIDE, ARMLESS	CSCI	200.00	200.00	7
Strong Industries, Inc.	XC-2342	CHAIR, CONFERENCE, LEATHER		1080.00	1188.00	10
To Be Determined		Fabric prototype		0.00	0.00	0

Find: using this order: Vendor Name Search in: for: Find Next Find all

General

Type: CHAIR, EXECUTIVE Code: Spec1 Item #:
 Unit of meas: EA Size:
 Vendor ID: ALLIRON All-Iron, Inc. Weight: 50 lbs Color: Plum
 Catalog/Model #: CDX-123 Mat\Fin: 100% Wool Material spec
 Prototype use: Use as a "prototype" template Other Descr:
 Use as placeholder for Spec IDs starting with:

Pricing

Catalog Cost: 1200.00 Each Lead Time: 4 weeks
 Add'l Opts: 0.00
 Total Cost: 1,200.00
 Markup: 0.00 0.00 %
 Price: 1,200.00 Lock

Utilities

Volts/Phs:
 Load:
 Conn Type:
 Gas:
 CFM/BTU:
 Hot Wtr:
 Cold Wtr:
 Waste:

Image

Select...

Auto-add Tips

Client List

Clients can “own” one or more projects in the system, and may represent (for independent firms) the owner of a property for which projects will be executed, or (for corporate design departments) any other unit in the organization.

Each client has a main address and an optional alternate shipping address. These addresses are at the top of the “cascade” of addresses that become the shipping address for project items (however, each project can have its own project address — read more about this on the “Project List” page).

As on other screens, the “E-mail” field becomes an active button if an e-mail address is entered and, if email software is available on the system, creates a new e-mail message to the listed contact. It can also copy the email address to the clipboard.

FF&EZ Design / Purchasing | Version 4.2.34

Client List

Views	ID>	Name	Location	Contact	Phone	Fax
Vendors	CAMBER	CAMBER HOSPITALITY, LLC	TUSCALOOSA, AL	TOBY WILSON	205-246-1355	
Library	DEMO GRP	Demonstration Group, LLC	Nashville, TN	John Smyth		
Clients	LRP	LRP PROPERTIES	OXBOW, MI	Luke Franklin	601-541-6351	
Projects	WHTHAT	White Hat Group	Atlanta, GA	Lawrence Downer		
Areas	WILCO	Wilco Hospitality	Los Angeles, CA	Dave Wilco	205-246-1355	
Rooms	WINWOOD	WINWOOD HOSPITALITY	RALEIGH, NC	P.K. PATEL	919-468-9190 X117	
FF&E Wksht	XYX	Hotel Group XYZ				
Objects	YOUR FIRM	Your Design Firm				
Specs						
Orders						
Expediting						
Invoices						
Check Req's						

Find: using this order: Client ID Search in: for: Find Next Find all A A

General

Client ID: DEMO GRP

Company: Demonstration Group, LLC

Contact: John Last: Smyth

Billing Contact: Last:

Phone 1: Account #: Terms:

Phone 2: Purch'g Fee %: %

Fax: tax ID:

E-Mail:

Comment:

Addresses

Street: 357 Demonbreun

City/Locality: Nashville

State/Province: TN Postal Code: 37204

Country: ISO:

Shipping: Use main address above

Addresses entered here become the defaults for all of this client's projects (and orders in the Purchasing module) unless you override them on those screens.

Changes made to a client affect all of their projects. If you need to preserve the name, address and contacts in old projects, create "new" versions with the Clone command to use in newer projects.

Be sure to include the recipient name in any alternate address.

Commands: Add Edit Clone Delete Import list... Query... Print... Exit Form Quit

Auto-add Tips

Project List

This screen contains all setup information for a project, including its location and street address, alternate billing and shipping addresses and default (or target) rates for markup (or gross margin), taxes, estimated freight and purchasing fees. The rates entered on this screen are copied to all new specifications in the project, where they can be overridden on a spec by spec basis. VAT tax types are supported. The *Design/Purchasing* version supports tax quotes on orders instead of flat tax rates for complicated tax situations.

The addresses shown, especially the project shipping address, are used when the addresses on the client's record do not apply to all projects for that client. When a shipping address is printed for a spec, the system checks to see if a special address has been entered on the spec itself, then looks at the address here, and finally at the client record.

Each project is assigned to a client, and more than one project can be assigned to each client. Projects can represent new construction, a capital budget for a fiscal year or even single replacement orders.

For international work, the currency for each project can be set separately.

The billing for each project's FF&E is controlled by the "Vendors are to" setting under "Billing Options" and can be set to one of three types: 1) invoiced to you for resale (usually at a profit), 2) invoiced to your client (basic purchasing management)) and

Project List

ID>	Title	Location	Client	Client Ref	Started
DEMO SALES	Sales Order	Somewhere	The John Smith Companies		02/28/20
DEMO-1	Demo Project	Anywhere	The John Smith Companies		01/06/20
DEMO-2	Demo Project	Anywhere	The John Smith Companies		01/06/20
DEMO-PM	Hastings Suites - Airport	Los Angeles, California	The John Smith Companies		02/15/07
DEMO-PROF	Hastings Suites - Downtown	Los Angeles, California	The John Smith Companies		02/15/07
SAMPLES	Sample Room Library	Anywhere, USA	Your Design Firm		/ /

General

Project ID: DEMO-PM Type: Design Project Sales Order Started: 02/15/07 Closed
 Title: Hastings Suites - Airport Issued: 02/15/07 Purge
 Location: Los Angeles, California Revised: / /
 Client ID: GMITICO New The John Smith Companies Install: 05/07/19
 Client Ref: Project Budget: 0
 Currency: Cir Symbol: Use symbol? Area Unit of Meas: Sq Ft
 Designer: Miller, Sarah / SM New Edit. 123 456-7890 x23 Tax Rate, Code: 7.000%
 Project Mgr: Kibabo, Mesoro / MK New Edit. 123 456-7890 x14 Limit field size Apply as a VAT type
 Salesperson: Hissol, Jon / JB New Edit. 123 456-7890 x25 Estimated Freight: 10.00% Tax?

Billing Options

Vendors are to: 1 - Invoice us (we will invoice "sell" price to client) Project Base Markup: 0.00%
 2 - Invoice client directly (incl'g internal clients) Purchasing Mgmt Fee: 5.00% Tax?
 3 - Invoice client but send to us "as agent"

Project Addresses

Billing: Use client address
 The John Smith Companies
 c/o Smith, Wang & Garcia, Architects (/)
 123 Main Street
 Suite 1701
 Los Angeles, CA 99990

Shipping: Use client address
 Alta, Jessica Filmore
 Hastings Suites
 1235 700 3 Grand Ave
 Los Angeles, CA 90017

*Include recipient (if any) on alternate addresses. *For "send invoice to us as agent" projects, line 1 is used on PO as "client name" with your return address.*

3) invoiced to the client with you as their agent (purchasing and payables).

The setting of this option determines whether a markup or a purchasing management fee can be entered.

One of the most powerful features of FF&EZ is the ability to copy an entire project with the **Clone** command shown on this screen. This gives you

the ability to create both "skeleton" projects (containing standardized room types made up of "skeleton" objects and specs) or fully detailed projects meeting the standards of a corporate brand.

These projects can be cloned to create a "live" project ready for further development. They can also be the

source for a more piecemeal approach, where you create a project then import rooms, objects or specs.

In the *Design/Purchasing* version, there are additional options to create project-specific order numbering using a prefix. The "Views" buttons associated with that version will also appear.

Area List

An “area” is any major subdivision of a project, usually corresponding to sections like “Convention,” “Public,” “Guest Rooms,” “Exterior,” etc., however, because it is simply a label used to group sub-areas (that is, “rooms”) there is a lot of flexibility in how areas can be set up.

Each area can be assigned to a sub-project for custom reporting. For accounting needs, each area can be assigned a “group code” and a budget. Budget amounts can be entered directly into the list. There are “hooks” in FF&EZ that allow custom accounting codes to be assembled on custom reports or (in *Design/Purchasing*) orders.

NOTE: The screen shown here (and in the following pages) are from the *Design/Purchasing* version, showing the purchasing-related “Views” buttons that are included in that version. The *Design* version is identical except for not having these extra functions.

FF&EZ Design / Purchasing | Version 4.2.34

Project Area List

Area ID>	Contact	Phone	Sub-project	Group	Budget
Administration			001		0
Back Of House			001		0
Commercial			001		0
Convention Center			001		0
Exterior			001		0
Guest Rooms			001		0
[Other]			001		0

Find: using this order: Group Code Search in: for:

Area ID:

Sub-project:

Group Code:

Budget:

Contact: **Last:**

Phone:

Area (size): Sq Ft

Room List:

Room ID	Name	Budget	Contact	Rm Qty
C SU	Suite, Corner	23000.00		17
GUEST RM	Guest Room	0.00		1
K STE	King Suite	0.00		9
K STE ADAS	King Suite ADA w/Shower	0.00		1
K STE/DD	King Ste w/ /Divider Desk	0.00		9
KING	King Room - Alternate	0.00		18
KING ADA	King ADA	0.00		1
KING SOFA	King Sofa	0.00		9
Q/Q	Queen/Queen	0.00		47
Q/Q ADA	Queen/Queen ADA	0.00		5
Q/Q EXT	Queen/Queen Extended	0.00		8

Project: DEMO-PROF | Hastings Suites - Downtown | Los Angeles, California Auto-add Tips

Room List

A “room” is a sub-area that is typically used to hold the FF&E associated with a room or a room type. The only difference between a “room” and a “room type” is that the latter has a quantity or "room count" set to greater than 1. In all cases, the user only enters the FF&E quantities (on the FF&E Worksheet, discussed next) needed to define one room. FF&EZ takes care of the resulting calculations to extend the needed quantities. This means that you can maintain a full specification database, adjust the room mix in a project, and get an immediately recalculation of all FF&E quantities needed in the project.

Each room must be assigned to an area and can also be assigned to a phase for custom reporting purposes.

For accounting purposes, each room can be assigned a “Room Code” that is typically used to code all of the room’s contents with a location-related accounting code prefix, although custom uses can be developed. Each room also has a budget that can be entered for comparison to FF&E contents (you can compare budgets assigned to objects and the total costs of the objects as calculated from the specification pricing.

Like many screens in FF&EZ, the room screen includes both a **Clone** command button (to copy the currently highlighted room) and an **Import** option as part of the **Add** command. Both of these can be used to instantly populate the FF&E Worksheet (covered later) with FF&E. This can be part of creating a similar

Project Room List

Area ID	Room ID	Name	Phase	Code	Budget	Qty*	Ext Budget	Ext Cost	Ext Price
Commercial	VENDING 6	Vending - 6th Fl	1		0	1	0	211	255
Commercial	WOMEN'S 1	Women's Room - 1st Fl	1		0	1	0	307	393
Commercial	WOMEN'S 2	Women's Room - 2nd Fl	1		0	1	0	387	476
Guest Rooms	C SU	Suite, Corner	1		23,000	17	391,000	208,801	254,344
Guest Rooms	GUEST RM	Guest Room	1		0	1	0	1,524	1,839
Guest Rooms	K STE	King Suite	1		0	9	0	59,103	71,685
Guest Rooms	K STE ADAS	King Suite ADA w/Shower	1		0	1	0	7,559	9,159
Guest Rooms	K STE/DD	King Ste w /Divider Desk	1		0	9	0	62,298	75,547
Guest Rooms	KING	King Room - Alternate	1		0	18	0	102,150	124,161
Guest Rooms	KING ADA	King ADA	1		0	1	0	5,385	6,545
Guest Rooms	KING SOFA	King Sofa	1		0	9	0	50,877	61,959
Guest Rooms	Q/Q	Queen/Queen	1		0	47	0	270,908	327,919
Guest Rooms	Q/Q ADA	Queen/Queen ADA	1		0	5	0	33,650	40,826
Guest Rooms	Q/Q EXT	Queen/Queen Extended	1		0	8	0	50,128	60,877
Guest Rooms	Q/Q LARGE	Queen/Queen Large	1		0	9	0	54,630	66,147

Totals Area: 142 391,000 976,146 1,184,795
Project: 142 404,400 1,150,233 1,395,601

Area ID: Guest Rooms Phase: 1
Room ID: C SU Room Code:
Name: Suite, Corner Budget per room: 23000.00 Contact: Last:
Room Qty: 17 Include in room count total? Area (size): 0 Sq Ft Phone:

Contents:

Tag	Description	Primary Vendor	Quantity	Budget	Extended	Cost:	Extended	Price	Extended
ACC-02	Bath Accessories Package	GATCO	1.00	380	380	291.35	291.35	351.66	351.66
ACC-03	Mirror, Decorative	CENTURY	1.00	230	230	175.00	175.00	211.22	211.22
ACC-05	Mirror, Full Length	CAROLINA M	1.00	76	76	59.00	59.00	71.21	71.21
ACC-06	Finale Vases	INTER-HOME	1.00	390	390	299.00	299.00	360.89	360.89
ACC-07	Ball finial	GREAT CITY	1.00	110	110	85.00	85.00	102.59	102.59
ACC-08	Accessory @ Cocktail Table	CRYSTAL CL	1.00	3	3	2.75	2.75	3.32	3.32
ACC-09	Ball finial	GREAT CITY	2.00	150	300	110.00	220.00	132.77	265.54
ACC-10	Weather Vane, Windsor Garden	INTER-HOME	1.00	130	130	99.00	99.00	119.49	119.49
ART-02	Art (Framed Photo) @ Sofa	IMC	1.00	200	200	150.00	150.00	203.44	203.44
ART-02B	Art @ Testing Lab	TBD	1.00	0	0	0.00	0.00	0.00	0.00
ART-03	Art (Framed Photo) @ Fainting Couch	IMC	1.00	200	200	150.00	150.00	203.44	203.44
ART-04	Art (Framed Photo) @ Luggage Bench	IMC	1.00	200	200	150.00	150.00	189.66	189.66
ART-04.1	Artwork, French Garden Plaque	BALLARD	1.00	110	110	80.00	80.00	96.56	96.56
ART-04.2	Artwork, "Summer Shadows"	ARTHORIZON	1.00	140	140	106.00	106.00	127.94	127.94
BED-01	Bed Base (King)	LEGGETT	1.00	58	58	45.00	45.00	54.31	54.31
BED-03	Bed Frame (King ADA Rms)	LEGGETT	1.00	39	39	30.00	30.00	36.21	36.21

Project: DEMO-PROF | Hastings Suites - Downtown | Los Angeles, California

room type (with the **Clone** command) or of importing entire rooms and their contents from either a prototype project, a brand specific projector any previous project containing a room that can be used in the current one.

For hospitality industry users who need to manage room counts or “keys,” you can add any room to a

quantity count that is summarized by area and for the entire project. This allows you to easily change the room mix for guest room types and still confirm you have the expected number of “keys.”

FF&E Worksheet (1)

The FF&E Worksheet is the heart of the program, where you specify “what” goes “where” and “how many.” As mentioned elsewhere, this screen is used to define the contents of each room in a project, including “room types” where the quantity you enter for one room is automatically multiplied in reports by the quantity of the room itself (see the “Room List” page).

The Worksheet shows all the items “officially” used in a project — reports from this screen do not show “alternate” specs and objects that do not appear in this list.

You can instantly see a re-grouped list by clicking a column heading to change the sort order. (“Which of this vendor’s products are used?” “Where is this item used?”) Each line on the list represents a “usage” of an “object” (a finished piece of FF&E that may consist of one or more specs) in a specific room. An object usage only has to be entered once in each desired room, because part of defining the usage is the total quantity needed in that room (the screen shows a lot of data, but it really only contains Room IDs, object Tags and quantities).

On the Worksheet, the **Edit** and **Clone** commands have a somewhat more specialized function. Editing an occurrence allows you to either move the occurrence (by changing the room) or replace it (by changing the object that was used). Cloning an occurrence means to copy to other rooms, and can be a very fast way to put the same object in multiple rooms. The **Replace**

FF&EZ Design / Purchasing | Version 4.2.34

FF&E Worksheet

Views	Area ID>	Phs	Class	Room ID	Finish Locn	Object	Description	Primary Vndr	Primary Spec	Qty / Room	Unit	P.O. #
Vendors	Guest Rooms	1	FRN	C SU		LIGHT-04	Pendant	CANDELLA	LIGHT-04	1.00	Each	
Library	Guest Rooms	1	FRN	C SU		LIGHT-05	Wall Sconce, Tapered	TOP BRASS	LIGHT-05	2.00	Each	
Clients	Guest Rooms	1	FRN	C SU		LIGHT-06	Wall Sconce	SCOTTLAMP	LIGHT-06	2.00	Each	
Projects	Guest Rooms	1	FRN	C SU		PILLOW-01	Throw Pillows (Sleeper Chaise)	KELLEX-N	PILLOW-01	2.00	Each	
Areas	Guest Rooms	1	FRN	C SU		PILLOW-02	Lumbar Pillows (Guest Rooms)	TBD	PILLOW-02	2.00	Each	
Rooms	Guest Rooms	1	FRN	C SU		PLANT-01	Plant / Planter (Guest Rooms)	LABS	PLANT-01	1.00	Each	
FF&E Wksh	Guest Rooms	1	FRN	C SU		SEAT-01	Sleeper Chaise (R)	KELLEX-N	SEAT-01	1.00	Each	
Objects	Guest Rooms	1	FRN	C SU		SEAT-02	Sleeper Chaise (L)	KELLEX-N	SEAT-02	1.00	Each	
Specs	Guest Rooms	1	FRN	C SU		SEAT-03	Ergo Task Chair	SOUTHFIELD	SEAT-03	2.00	Each	555
Orders	Guest Rooms	1	FRN	C SU		SEAT-04	Side Chair (@ Desk)	SOUTHFIELD	SEAT-04	2.00	Each	
Expediting	Guest Rooms	1	FRN	C SU		SEAT-05	Ottoman / Coffee Table	SOUTHFIELD	SEAT-05	1.00	Each	
Invoices	Guest Rooms	1	FRN	C SU		TABLE-01	Table, Cocktail	CENTURY	TABLE-01	1.00	Each	
Check Req's	Guest Rooms	1	FRN	C SU		TABLE-02	Table, Console	CENTURY	TABLE-02	1.00	Each	
Commands	Guest Rooms	1	FRN	C SU		WIN-01	Window Treatment (Guest Rooms)	CDS INC	WIN-01	1.00	Each	
Add	Guest Rooms	1	FRN	C SU		WIN-02	Window Blinds	GRABER IND	WIN-02	1.00	Each	
Edit	Guest Rooms	1	FRN	C SU		XTRA-01	Owner Supplied Items	TBPBO	XTRA-01	1.00	Each	
Replace	Guest Rooms	1	ACC	K STE		ACC-06	Finale Vases	INTER-HOME	ACC-06	1.00	Lot	582
Clone	Guest Rooms	1	FIN	K STE		CPT-04	Custom Carpet	DESIGN ORI	CPT-04	1.00	Sq Yd	
Delete	Guest Rooms	1	FIN	K STE	Floor	CPT-01	Carpet (Guest Rooms)	SIGNATURE	CPT-01	1.00	Sq Yd	
Order...	Guest Rooms	1	FIN	K STE	Floor	CPTB-01	Carpet Base (Guest Rooms)	SIGNATURE	CPTB-01	1.00	LIN FT	
Utilities	Guest Rooms	1	FIN	K STE	Floor	PAD-01	Carpet Pad (Guest Rooms)	LEGGETT & P	PAD-01	1.00	Sq Yd	
Query...	Guest Rooms	1	FIN	K STE	Wall	VWC-01	VWC (Guest Room Baths)	EYKON	VWC-01	1.00	Lin Yd	
Print...	Guest Rooms	1	FRN	K STE		ART-02	Art (Framed Photo) @ Sofa	IMC	ART-02	1.00	Each	
Close Project	Guest Rooms	1	FRN	K STE		BED-01	Bed Base (King)	LEGGETT	BED-01	2.00	Each	
Quit	Guest Rooms	1	FRN	K STE		BED-05	King Mattress / Boxsprings	SERTA	BED-05	1.00	SET	
	Guest Rooms	1	FRN	K STE		CASE-01	Headboard (King)	JTB	CASE-01	1.00	Each	
	Guest Rooms	1	FRN	K STE		CASE-03	Nightstand (24" w X 28" h)	JTB	CASE-03	2.00	Each	
	Guest Rooms	1	FRN	K STE		CASE-10	Executive Desk	JTB	CASE-10	1.00	Each	
	Guest Rooms	1	FRN	K STE		CASE-12	TV / VCR Chest	JTB	CASE-12	1.00	Each	
	Guest Rooms	1	FRN	K STE		CASE-15	End Table	JTB	CASE-15	1.00	Each	
	Guest Rooms	1	FRN	K STE		CASE-17	Bath Vanity Base (Base Only)	JTB	CASE-17	1.00	Each	

Find: using this order: Area ID Search in: for:

Last save: 08/10/08

FF&E Summary

Mode: Budgeting Cost/Sell

	Budget	Total Obj. Cost	Total Obj. Sell	Profit Margin
Project:	1,300,000	1,148,709	1,393,762	17.6%
Area: Guest Rooms	0	157,388	190,549	17.4%
Room: King Suite	9 Rms	0	15,238	17.6%
Object: Art (Framed Photo) @ Sofa	200	135	163	17.1%

Spec(s):	Spec ID	Type	Vendor ID	Catalog #	Qty/Obj	Unit	Cost	Price
	ART-02	Art (Framed Photo) @ Sofa	IMC	HJCV MS BARGE	1.00000	ea	125.00	159.49
	FRAME-01	Frame	DECOR	9654	1.00000	Ea	25.00	43.95

Project: DEMO-PROF | Hastings Suites - Downtown | Los Angeles, California Show images Auto-sum Auto-add Tips



command allows you to replace any object with another in some or all rooms where it was used. The lower section of the screen includes an “FF&E Summary” that can be used to compare budgeted amounts to actual pricing, or to compare vendor cost to sell prices, at

each level from object up to the project total. On the lower right of the screen is an image box that displays the images (if any) of the specifications for the object. You can double-click items in the Summary box to edit them directly instead of using a “Views” button.

In the Design/Purchasing version (shown above), you will also see the purchasing-related “Views” buttons and the **Order...** button under the “Commands” group, which is used to generate purchase orders. That version also includes the “PO #” column on the right side of the list.

FF&E Worksheet (2)

The image to the right shows the layout displayed after using the **Add** or **Edit** buttons on the FF&E Worksheet. On the left side are three pick lists. The first two are used to select the location (if different from where you were already) or to create new areas or rooms as needed.

The third pick list is used to select the object to be placed in the room, or to create a new one if it does not yet exist on the list. Objects can be placed in as many rooms as needed at whatever quantity is required for that room.

The **Create** buttons for new areas, rooms and objects can be triggered by pressing **Alt-A**, **Alt-R** and **Alt-O** respectively, which will help with “head down” data entry.

Below the pick lists is a “Quantity” field used to indicate how much or how many of that item goes into the selected room. As always, the user only has to specify the quantity for one room. FF&EZ does the rest of the math for you.

On the right, the system displays the current contents of the room so that it is much easier to see what has already been added. Like the main worksheet list, this is sorted by object class then by tag so that specific types of items like finishes can be easily seen. If you accidentally select an object that already exists in the selected room, it will be highlighted on the list.

Otherwise, the highlight moves to the top to indicate what will happen with the selected object.

Current contents of room K STE Status: Adding an occurrence to the selected room.

Class	Fin. Loc'n	Tag	Description	Vendor	Qty/Rm	Ext. Price
<< ITEM WILL BE ADDED TO THIS ROOM >>						
						0.00
ACC		ACC-06	Finale Vases	INTER-HOME	1.0	360.89
FIN		CPT-04	Custom Carpet	DESIGN ORI	1.0	54.31
FIN	Floor	CPT-01	Carpet (Guest Rooms)	SIGNATURE	1.0	42.24
FIN	Floor	CPTB-01	Carpet Base (Guest Rooms)	SIGNATURE	1.0	42.24
FIN	Floor	PAD-01	Carpet Pad (Guest Rooms)	LEGGETT & P	1.0	14.48
FIN	Wall	WVC-01	VWC (Guest Room Baths)	EYKON	1.0	36.21
FRN		ART-02	Art (Framed Photo) @ Sofa	IMC	1.0	203.44
FRN		BED-01	Bed Base (King)	LEGGETT	2.0	108.62
FRN		BED-05	King Mattress / Boxsprings	SERTA	1.0	724.20
FRN		CASE-01	Headboard (King)	JTB	1.0	90.72
FRN		CASE-03	Nightstand (24" w X 28" h)	JTB	2.0	307.12
FRN		CASE-10	Executive Desk	JTB	1.0	429.10
FRN		CASE-12	TV / VCR Chest	JTB	1.0	424.10
FRN		CASE-15	End Table	JTB	1.0	274.26
FRN		CASE-17	Bath Vanity Base (Base Only)	JTB	1.0	419.10
FRN		CASE-49	Towel Box Shelf (Queen/Queen)	JTB	1.0	14.48
FRN		COVER-01	White Bed Covers (King)	TBD	1.0	90.52
FRN		DUST-01	Dust Skirt (King)	CDS INC	1.0	90.52
FRN		LAMP-01	End Table Lamp	ASHLEY	1.0	42.24
FRN		LAMP-02	Floor Lamp	ASHLEY	1.0	42.24
FRN		LAMP-04	Desk Lamp (Double Light)	ASHLEY	1.0	42.24
FRN		LIGHT-002	Vanity Bar Light (Guest Baths)	TROY	1.0	60.35
FRN		LIGHT-004	Ceiling Light (Guest Entry)	BROWNLEE	1.0	60.35
FRN		LIGHT-005	Ceiling Light (Guest Bath)	BROWNLEE	1.0	60.35
FRN		LIGHT-006	S/A Wall Lights (Night Stands/Lug Bench)	ASHLEY	2.0	120.70
FRN		MIR-05	Vanity Mirror (Guest Rooms)	IMC	1.0	96.56
FRN		MIR-06	Mirror @ Standard Desk	IMC	1.0	96.56
FRN		MIR-08	Wet Bar Mirror (Guest Rooms)	IMC	1.0	96.56
FRN		PILLOW-01	Throw Pillows (Sleeper Chaise)	KELLEX-N	1.0	35.60
FRN		PILLOW-02	Lumbar Pillows (Guest Rooms)	TBD	1.0	17.50
FRN		PLANT-01	Plant / Planter (Guest Rooms)	LABS	1.0	90.52
FRN		PLANT-02	Silk Floral (Guest Rooms)	LABS	1.0	90.52
FRN		SEAT-03	Ergo Task Chair	SOUTHFIELD	1.0	385.03
FRN		SEAT-04	Side Chair (@ Desk)	SOUTHFIELD	1.0	330.49
FRN		SEAT-05	Ottoman / Coffee Table	SOUTHFIELD	1.0	226.91
FRN		WIN-01	Window Treatment (Guest Rooms)	CDS INC	2.0	1,523.10
FRN		WIN-01A	Stationary Side Panels	CDS INC	2.0	253.46
Show: <input type="radio"/> Budgets <input checked="" type="radio"/> Prices					Room Total: 7,965.09	
					Total for 9 rooms: 71,685.81	

Project: DEMO-PROF | Hastings Suites - Downtown | Los Angeles, California

In addition to the “Quantity” field, if you select a “finish” class of object, the “Location of finish” field is enabled so you can indicate where the finish is used in that room.

Finally, a special Save button (**Save w/ Auto-add**) makes it easy to start a sequence of adding a list of items to a room without going in and out of the

data entry mode. Selecting this option once will save your current entry, then leave you in “add” mode so that another item can be added to a room.

Object List (1)

An “object” is a generic term for any finished and delivered piece of FF&E, whether it is a chair with COM, an accessories “allowance” or a wall finish specified for a room. Objects are actually very simple things, consisting of an ID (called the “Tag”), a brief and generic description, a “Class” (furniture, finish, equipment, etc.), a unit of measure and an optional budget.

Objects can be defined to satisfy the functional and budgeting requirements of a project long before any product selection is needed. Objects become “real” when you attach a specification to them, which is done automatically as you create each object. Specs can be fully detailed or “skeleton” or “placeholder” specs to be detailed later.

In the process of finishing a project, the designer selects products and describes them in detail on the Specification List (next). Additional specs can be attached to the appropriate objects as needed.

The definition of an object can be changed simply by attaching or replacing specs on its “Component List” or by rewriting the specs themselves (depending upon whether the original spec might still be used elsewhere in the project).

By default, The “Description” for an object shown on this screen is overridden by the “Type/Product” from Component #1 (the primary spec that is attached to it) on all reports and on other screens. Thus, an original generic description does not need to be

FF&EZ - A Specifications Tool for Design Professionals

Project Object List

Tag>	Description	Primary Vndr	Primary Spec	Typ1 Use	Code	Budget	Cost	Total Price
PLANT-04	Planter (Pool)	ELEMENTS	PLANT-04	POOL	OSOI	96.00	75.00	75.00
PLANT-05	Plant (Bd. Rm)	DISTINCTIV	PLANT-05	BD ROOM		96.00	75.00	75.00
PLANT-06	Plant (Lobby)	DISTINCTIV	PLANT-06	LOBBY		96.00	75.00	75.00
PLANT-07	Plant (Lobby)	LABS	PLANT-07	LOBBY		96.00	75.00	75.00
PLANT-08	PLANT (Exercise Room)	DISTINCTIV	PLANT-08	EXER RM		96.00	75.00	75.00
POD-01	Lectern Podium	PETER PEPP	POD-01	CONF RMS	OSOI	390.00	300.00	300.00
PT-01	Paint For Walls	BENMOORE	PT-01	C SU		0.00	0.00	0.00
PT-03	Paint Between Crown & Trim	BENMOORE	PT-03	C SU		0.00	0.00	0.00
PT-06	Paint For Ceilings	BENMOORE	PT-06	C SU		0.00	0.00	0.00
PT-07	Paint For Bath Ceilings	BENMOORE	PT-07	C SU		0.00	0.00	0.00
PT-08	Paint	TOABO-X	PT-08	C SU		0.00	0.00	0.00
SEAT-02	Sleeper Chaise (L)	KELLEX/N	SEAT-02	C SU	OSOI	640.00	565.00	565.00
SEAT-03	Ergo Task Chair	SOUTHFIELD	SEAT-03	Q/Q SUITE	OSOI	350.00	273.00	273.00
SEAT-04	Side Chair (@ Desk)	SOUTHFIELD	SEAT-04	Q/Q SUITE	OSOI	350.00	273.00	273.00
SEAT-05	Ottoman / Coffee Table	SOUTHFIELD	SEAT-05	K STE/DD	OSOI	240.00	188.00	188.00
SEAT-05A	Ottoman / Coffee Table	SOUTHFIELD	SEAT-05A	Q/Q SUITE	OSOI	240.00	188.00	188.00
SEAT-06	Lounge Chair	SOUTHFIELD	SEAT-06	Q/Q SUITE	OSOI	350.00	273.00	273.00
SEAT-07	Ottoman	SOUTHFIELD	SEAT-07	Q/Q EXT	OSOI	240.00	188.00	188.00
SEAT-08	Luggage Bench	JTB	SEAT-08	Q/Q LARGE	OSOI	320.00	248.00	248.00
SEAT-09	Sleeper Chair	KELLEX/N	SEAT-09	KING		350.00	273.00	273.00
SEAT-09A	Window Seat Cushion	CDS INC	SEAT-09A	Q/Q SUITE		51.00	40.00	40.00
SEAT-10	Executive (Board Room)	SOUTHFIELD	SEAT-10	BD ROOM	OSOI	570.00	446.00	446.00
SEAT-11	Club Chair (Business Center)	FKO	SEAT-11	BUSINESS	OSOI	350.00	273.00	273.00

Find: sea using this order: Tag Go Search in: for: Find Next Find all

Tag: SEAT-02 Class: FRN Code: OSOI Notes:

Description: Sleeper Chaise (L)
 Use component #1 "Type/Product" in the worksheet and reports.
 Unit of measure: Each
 Budget: 640.00

Components for SEAT-02

You can modify the component list without editing the object fields. Double-click a component to edit its specification. "Qty/Object" can be entered directly

#	Spec ID	Type	Vendor ID	Catalog #	Cost	Price	Qty / Object	Unit
1	SEAT-02	Sleeper Chaise (L)	KELLEX/N	SP3938-46 (L)	475.00	475.00	1.000000	Each
2	UPH-01	Uph (Seat-01 & 02)	KRAVET	27222 - 3	20.00	20.00	4.500000	Yd

Attach new or replace selected component: Select product spec to use: New Qty/object: Lot Attach Replace

Project: DEMO-PM | Hastings Suites - Airport | Los Angeles, California Show report descriptions Auto-add Tips

updated once product selection has been done—the object simply “becomes” the primary product.

The quantity of each product used in the object is specified when the product is attached (see “Qty” column in the Component List near the bottom). The normal quantity for the primary component is 1, but

supporting product quantities are the amount needed for the completed object (e.g., 3.5 yards of fabric).

Because of this approach, FF&EZ can automatically track how much of each product is needed in the entire project (e.g., if you adjust the room mix in a hotel, all quantities for all products are immediately recalculated for reports.).

One of the most powerful features on the Object List screen is the **Import** option (part of the **Add** command), which allows you to import an object and its specs from any other project.

The tools seen around the Component List can be used to add, delete or change the order of the products.

Object List (2)

When you click on the **Add** button you have the ability to add up to two component specifications to the object when it is saved. This means that any time the object screen is displayed in “add” mode, you have several options:

1. By default, the system creates a “placeholder” specification (with just the minimum information needed) and adds it to the Specification List for you. This lets you create objects that are already connected to a matching “skeleton” specs. After building a room and objects this way, you can detail the specs on the Specification List later. By default, a placeholder spec will have a “TBD” vendor, but you can override this with the vendor of your choice.
2. You can also add a secondary spec for a supporting product (like a fabric or a per item installation charge).
3. In both cases, you can select an existing spec to use in the new object. This has the typical **New** button next to it, which means that you can just as easily add and fully detail a specification — or import one from a library or other project.

If you add a secondary component, you need to specify a little more information for a secondary spec (the primary spec will default to values related to the object itself, but secondary specs like fabrics often have different units of measure or a

FF&E Design / Purchasing | Version 4.2.34

Project Object List

Views	Tag	Description	Class	Primary Vndr	Primary Spec	Typ1 Use	Code	Budget	Cost	Total Price
Vendors	PLANT-05	Plant (Bd. Rm)	FRN	DISTINCTIV	PLANT-05	BD ROOM		96.00	75.00	90.52
Library	PLANT-06	Plant (Lobby)	FRN	DISTINCTIV	PLANT-06	LOBBY		96.00	75.00	90.52
Clients	PLANT-07	Plant (Lobby)	FRN	LABS	PLANT-07	LOBBY		96.00	75.00	90.52
Projects	PLANT-08	PLANT (Exercise Room)	FRN	DISTINCTIV	PLANT-08	EXER RM		96.00	75.00	90.52
Areas	POD-01	Lectern Podium	FRN	PETER PEPP	POD-01	CONF RMS	OSOI	390.00	300.00	362.10
Rooms	PT-01	Paint For Walls	FIN	BENMOORE	PT-01	C SU		0.00	0.00	0.00
FF&E Wkshd	PT-03	Paint Between Crown & Trim	FIN	BENMOORE	PT-03	C SU		0.00	0.00	0.00
Objects	PT-06	Paint For Ceilings	FIN	BENMOORE	PT-06	C SU		0.00	0.00	0.00
Specs	PT-07	Paint For Bath Ceilings	FIN	BENMOORE	PT-07	C SU		0.00	0.00	0.00
Orders	PT-08	Paint	FIN	TOABO-X	PT-08	C SU		0.00	0.00	0.00
Expediting	SEAT-01	Sleeper Chaise (R)	FRN	KELLEX-N	SEAT-01	C SU	OSOI	640.00	495.00	597.46
Invoices	SEAT-02	Sleeper Chaise (L)	FRN	KELLEX-N	SEAT-02	C SU	OSOI	640.00	447.50	599.14
Check Req's	SEAT-03	Ergo Task Chair	FRN	SOUTHFIELD	SEAT-03	Q/Q SUITE	OSOI	350.00	319.00	385.03
Commands	SEAT-04	Side Chair (@ Desk)	FRN	SOUTHFIELD	SEAT-04	Q/Q SUITE	OSOI	350.00	271.00	330.49
Save	SEAT-05	Ottoman / Coffee Table	FRN	SOUTHFIELD	SEAT-05	K STE/DD	OSOI	240.00	188.00	226.91
Cancel	SEAT-05A	Ottoman / Coffee Table	FRN	SOUTHFIELD	SEAT-05A	Q/Q SUITE	OSOI	240.00	188.00	226.91
Import	SEAT-06	Lounge Chair	FRN	SOUTHFIELD	SEAT-06	Q/Q SUITE	OSOI	350.00	271.00	330.49
Close Project	SEAT-07	Ottoman	FRN	SOUTHFIELD	SEAT-07	Q/Q EXT	OSOI	240.00	186.00	227.89
Quit	SEAT-08	Luggage Bench	FRN	JTB	SEAT-08	Q/Q LARGE	OSOI	320.00	248.00	299.33
	SEAT-09	Sleeper Chair	FRN	KELLEX-N	SEAT-09	KING		350.00	271.00	330.49
	SEAT-09A	Window Seat Cushion	FRN	CDS INC	SEAT-09A	Q/Q SUITE		51.00	40.00	48.28
	SEAT-10	Executive (Board Room)	FRN	SOUTHFIELD	SEAT-10	BD ROOM	OSOI	570.00	446.00	538.32
	SEAT-11	Club Chair (Business Center)	FRN	FKO	SEAT-11	BUSINESS	OSOI	350.00	273.00	328.51

Find: using this order: Tag: Go Search in: for: Find Next Find all A

Tag: SEAT-34 Class: FRN Code: Notes:

Description: LoveSeat @ Convention Corridor

Use component #1 "Type/Product" in the worksheet and reports.

Unit of measure: Each Budget: 1250.00

Primary Component (Product Specification)

Create a "placeholder" spec with this Spec ID: SEAT-34

Description: Love seat @ Convention Corridor Use prototype from library

Vendor: TBD New Material / Finish

Unit of measure: Each Attach existing spec as the primary component: New

Primary component quantity is assumed to be 1. To change, edit object's component list later.

Optional: Secondary Component (Product Specification)

No secondary component is needed.

Create "placeholder" spec with this Spec ID: COM-45

Description: Fabric @ Loveseat Use prototype

Vendor: TBD New Unit of measure: Mat'l / Finish

Attach existing spec as a secondary component: New

Quantity of secondary component used per object: 0.00

Project: DEMO-PROF | Hastings Suites - Downtown | Los Angeles, California Show report descriptions Auto-add Tips

specific “quantity per object”. For instance, a chair object will have one chair frame each but might require a quantity of fabric such as 3.5 YDS.

For both the primary specification and the secondary one, the prefix used in the Spec ID can key to a prototype template specification set up in the Library. If the system finds a match,

that template will be automatically imported as part of creating the specification.

You can add as many components (products) to an object as is required to create the finished and installed object. The general rule: you need one component for each purchase order required for the finished product.

The image on the previous page shows the controls that are used to manage the Component List for an existing object.

Specification List (1)

This is the screen common to more limited FF&E specifications systems, consisting of fields in which all the information about a specific product can be entered, including the vendor (or “TBD” if not known) and pricing. This includes alternate shipping address(es) and an image. FF&EZ uses a single image library folder and a specially designed image naming scheme that allows images to be shared among projects without duplicating files.

The unique aspect of FF&EZ is that specifications can be written without including any reference to location or quantity. This is because this information is calculated or assembled automatically for you, once you have “used” the spec in an object and “used” the object in a room. This leaves you with only two tasks in revising a project towards completion: 1) Making sure that your description of the product is complete and 2) making sure you have entered the amount needed per object on the object screen and placed the correct number needed in each room (the quantity shown on the FF&E Worksheet). The long-term benefit of this approach, besides an increased confidence in your numbers, is that specifications can be imported into other projects with far less need for revisions to eliminate project-specific references.

Specifications can be cloned within a project to create alternates or to record alternate quotes. Only specs that are used in an object used in the FF&E

FF&EZ Design / Purchasing | Version 4.2.34

Project Specification List

Spec ID	Type	Vendor	Catalog #	Code	Cost	Sell	Lead	DA	CA	Quote	Ship To
POD-01	Lectern Podium	PETER PEPP	7837RB/BLACK PANE	OSOI	300.00	362.10	6				Project
PT-01	Paint For Walls	BENMOORE			0.00	0.00	0				Project
PT-03	Paint Between Crown & Trim	BENMOORE			0.00	0.00	0				Project
PT-06	Paint For Ceilings	BENMOORE			0.00	0.00	0				Project
PT-07	Paint For Bath Ceilings	BENMOORE			0.00	0.00	0				Project
PT-08	Paint	TOABO-X			0.00	0.00	0				Project
SEAT-01	Sleeper Chaise (R)	KELLEX-N	SP3938-47 ZEN (R)	OSOI	475.00	573.32	8	✓	✓	×	Project
SEAT-02	Sleeper Chaise (L)	KELLEX-N	SP3938-46 (L)	OSOI	427.50	575.00	8	✓	✓	×	Project
SEAT-03	Ergo Task Chair	SOUTHFIELD	928	OSOI	250.00	301.75	6			×	Project
SEAT-04	Side Chair (@ Desk)	SOUTHFIELD	612-1S	OSOI	250.00	301.75	0				Project
SEAT-05	Ottoman / Coffee Table	SOUTHFIELD	825-X	OSOI	165.00	199.15	10				Project
SEAT-05A	Ottoman / Coffee Table	SOUTHFIELD	825-X	OSOI	165.00	199.15	10				Project
SEAT-06	Lounge Chair	SOUTHFIELD	317.1	OSOI	250.00	301.75	0				Project

Find: seat using this order: Spec ID Go Search in: for: Find Next Find all A A Last save: 11/12/19

General

Spec ID: SEAT-02 Image only

Type/Product: Sleeper Chaise (L)

Unit of meas: EA Code: OSOI

Spec'l Item #: Material/Finish spec

Size: 76" w 39" d 35" h

Weight: Repeat:

Color:

Mat'l/Fin:

Other Descr: Zen Sleeper Chaise #SP3938-46 Zen (L), Arm on Left when facing sleeper, Tight Back, Zen Cushions, Zen Mattress 8 1/2" pillowtop, Mech & Matt 75" long; patented z-coil fold over technology; Full size mattress; Seat Ht. 19"; Arm Ht. 35"; Note: Quantity of COM yardage req'd to be determined by fabricator; Note: # of Left Arm Chaises to be verified by purchasing agent base upon Architectural Plan 1 above

Sidemark: Auto Project ID / Object or Spec ID

Source, Pricing

Vendor ID: KELLEX-N

Catalog / Model #: SP3938-46 (L)

Supplier, Item #: (N/A)

Catalog Cost: 475.00 EA

Adjustments: -47.50 =

Total Cost: 427.50 (Exp: 04/16/19)

Markup: 147.50 34.50 %

Price: 575.00 Lock

Image

KELLEX #SP3938 ZEN CHAISE.JPG

Large image

Tax: 0.000 % % Recyc'd: n/a Recy'd orig

Shipping

Shipping note: Date: / /

Est. Freight: 8.90000 % Unit amt: 51.18 =

Lead Time: 8 weeks (Order by: 12/06/20)

Usage

This specification is used in the following objects:

Tag	Object Vendor and Description	Class	Qty/Object	In Rooms	Ship-to Excpn
SEAT-02	KELLEX-N: Sleeper Chaise (L)	FRN	1.000	17.0	

Project: DEMO-PROF | Hastings Suites - Downtown | Los Angeles, California Show Submittals Show Spec Status Equipment fields Auto-add Tips

Worksheet) will appear on the “official” project reports (the “official” reports are those printed from the FF&E Worksheet). This allows you to maintain alternate specifications that can be substituted based on budgeting scenarios.

Note the optional “supplier” vendor along with the main “manufacturer”

vendor under “Source, Pricing.” FF&EZ is designed to handle any combination of situations in specifying the source of a product: If a “supplier” is specified, orders for that product are sent to the supplier instead of ordered directly from the manufacturer. In addition to manual entry, an **Assign Supplier** utility is used to assign a supplier to specifications based on the

manufacturer, product type or other criteria.

This screen shows the “for profit” layout: costs and sell prices; for purchasing management projects, it shows costs and management fees. Prices can be auto-calculated from a markup or set manually and locked.

Specification List (2)

To the right is the Specifications List screen in “Editing” mode, showing three other features of the system. On the left you will see the **Import** and **Template** buttons that are a part of both the “adding” and “editing” modes. These allow you to replace all or most of the fields in the spec being added or edited with an existing specification from the Library or from another project. If certain critical fields (like “Spec ID” or “Price”) already have entries in them, the system will preserve these unless you choose to override them. In most cases, these functions are used when creating a new spec or updating a “skeleton” spec.

On the bottom of the screen is the Status / Options bar, with three options that change what the screen shows.

The “Show submittals” option displays the “Submittal Tracking” section, which allows you to set up to twelve types of submittal requirements, include two that can be user-defined for each specification. Those that are enabled appear on the “Illustration Sheet” (project book” reports and in the “Specification Status” reports. A general submittal notes section creates user- and date-stamped internal notes about the submittal process.

The “Show Spec Status” option displays optional fields (at bottom right) that can be used to track the design status of the specification, including simple tracking of submittals. The “Revision Group” field is used to group specs into a

The screenshot shows the 'Project Specification List' window. At the top is a table with columns: Spec ID, Type, Vendor, Catalog #, Code, Cost, Sell, Lead, DA, CA, Quote, Ship To. The row for 'SEAT-01' is highlighted, showing a 'Sleeper Chaise (R)' from vendor 'KELLEX-N' with a cost of 475.00 and a sell price of 573.32. Below the table is a search bar and a 'Find' button. The 'General' section shows 'Spec ID: SEAT-01' and 'Type/Product: Sleeper Chaise (R)'. The 'Submittal Tracking' section shows a table of submittal types with status and dates. The 'Spec Status' section shows 'Design approved: 02/23/19' and 'Client approved: 03/01/19'. The 'Submittals' section shows 'Total submittals required: 2' and 'Total submittals approved: 1'. The bottom status bar shows 'Project: DEMO-PROF | Hastings Suites - Downtown | Los Angeles, California'.

Spec ID	Type	Vendor	Catalog #	Code	Cost	Sell	Lead	DA	CA	Quote	Ship To
PT-01	Paint For Walls	BENMOORE			0.00	0.00	0				Project
PT-03	Paint Between Crown & Trim	BENMOORE			0.00	0.00	0				Project
PT-06	Paint For Ceilings	BENMOORE			0.00	0.00	0				Project
PT-07	Paint For Bath Ceilings	BENMOORE			0.00	0.00	0				Project
PT-08	Paint	TOABO-X			0.00	0.00	0				Project
SEAT-01	Sleeper Chaise (R)	KELLEX-N	SP3938-47 ZEN (R)	OSOI	475.00	573.32	8	✓	✓	✗	Project
SEAT-02	Sleeper Chaise (L)	KELLEX-N	SP3938-46 (L)	OSOI	427.50	575.00	8	✓	✓	✗	Project
SEAT-03	Ergo Task Chair	SOUTHFIELD	928	OSOI	250.00	301.75	6			✗	Project
SEAT-04	Side Chair (@ Desk)	SOUTHFIELD	612-1S	OSOI	250.00	301.75	0				Project
SEAT-05	Ottoman / Coffee Table	SOUTHFIELD	825-X	OSOI	165.00	199.15	10				Project
SEAT-05A	Ottoman / Coffee Table	SOUTHFIELD	825-X	OSOI	165.00	199.15	10				Project
SEAT-06	Lounge Chair	SOUTHFIELD	317-1	OSOI	250.00	301.75	0				Project
SEAT-07	Ottoman	SOUTHFIELD	317-8	OSOI	165.00	199.15	0				Project

specific “batch” of revised items that can be printed from the FF&E Worksheet using a query for the code you enter here. The “Status Notes” field is a general purpose field to be used for internal notes about the specification, the vendor or any other information that would not normally be printed. The web link field creates a live link to any web address you enter

(typically one for the product—the vendor form has a link for the vendor’s site).

One other option to note is the “Equipment fields” option, which displays a set of fields that are specific to major types of equipment (especially kitchen equipment).

These fields do not need to be used, since the “Other Descr” field can hold any amount of data, but they are provided as a way to help ensure that all needed capacity entries are easy to see.

Reports

FF&EZ has a robust reporting function that can print to any printer set up on your system and *directly* to PDF files. It also includes a powerful report previewer with thumbnail and search capabilities and the ability to save reports to PDF, RTF, Excel and HTML formats.*

Each major screen has its own set of reports—those that make sense when working with that type of information. The FF&E Worksheet, which contains the official “contents” of the project, has dozens of available reports for different purposes.

In the *Design/Purchasing* system, the Orders screen and the Expediting screen are the source of most reports.

If a query has been set up in the current editing screen, the Report Setup automatically uses it to duplicate the content seen on the screen. This can be overridden by switching the “Filter” back to “All records.” For very simple filtering, you can select a characteristic of the currently highlighted item on the screen with the “Current” filter option (e.g., the current vendor). This automatically filters the report for that characteristic.

In addition to the reports list, the screen contains two major tabs: “General Options” and “Report Options.” The latter displays any options that are specific to the selected report.

The screenshot shows the 'Report Setup - FF&E Reports' window. The 'Select report:' list contains several options, with 'Illustration Sheet by Tag' highlighted. Below the list, there are two tabs: 'General Options' and 'Report Options'. The 'Report Options' tab is selected, showing various configuration options. The 'Title' field is set to 'Illustration Sheet by Tag'. The 'Filter' section has 'All records' selected. The 'Pages' section has 'All' selected. The 'Design revision date' is set to '04/09/21'. The printer is listed as 'BROTHER HL-5250DN'. At the bottom, there are buttons for 'Printer...', 'Properties...', 'Preview', 'Print', '>PDF', 'Display PDF?' (checked), and 'Exit'.

The Reports Setup form contains the reports that are relevant to the major screen being used. Here, the FF&E Worksheet’s list is displayed, with the “Illustration Sheet by Tag” format selected.

Some reports have many options to select (see second image above), and if you normally select specific options, you can set these and then save them with a new report name as a custom variation of the base report. This includes giving the report your own title and subtitle.

This screenshot shows the 'Report Options' tab for the 'Illustration Sheet by Tag' report. It contains a large number of checkboxes and dropdown menus for customizing the report's appearance and content. For example, there are options for 'Use this base sheet layout' (set to '1-Images at 1'), 'Level of component specification detail to print' (set to '1-Full detail fo'), and 'Total object quantity and price information to print' (set to '1-Total quantit'). There are also options for 'If printing secondary components, vendor information to print' and 'If printing vendor, include Vendor ID?'. At the bottom, there are buttons for 'Printer...', 'Properties...', 'Preview', 'Print', '>PDF', 'Display PDF?' (checked), and 'Exit'.

This image shows the “Report Options” for the same “Illustration Sheet” format. Most reports have fewer options, but those intended for “public” consumption tend to have a large number of controls over what information is included.

*Note that some extremely tight report formats may not translate perfectly to the row/column format of spreadsheets.

FF&E^Z **Screens**

Design/Purchasing

The following pages show features that are exclusive to the purchasing management versions of FF&EZ.

Order List

Design/Purchasing version only

The Order Screen summarizes each order, showing all order “header” information, a brief list of the items and a very flexible set of shipping controls (shipping addresses are inherited from design project specifications if they are converted to this sub-system). In addition, basic tracking of vendor deposits are included on this screen.

New items can be entered here manually using the smaller **Add Item** button next to the Order Items list, however most orders are created automatically by using the **Order...** command on the FF&E Worksheet. Items can be imported from the Library, from a project or from an existing order.

The Order Items list section includes commands that allow you to edit or revise items, clone them within the order (to add unexpected quantity additions as separate items instead of variances), to split items for shipping control (one of two ways) and to delete or replace items.

All major order processing functions are found under the “Process...” button (more below). There are a number of tracking and recap reports that aid in managing orders, and the order format itself can be customized for an additional charge. The “Status Notes” field applies to the whole order. The **Add note** button inserts the date and user’s name at the top of the notes stack (“last in, first visible”).

Order List

Hold	<PO #	Client ID	Project ID	Clnt Ref	Status	Date	Vendor ID	Cost	Sell	Deposit Out	Ship To
<input type="checkbox"/>	562	SMITHCO	DEMO-PM		ISSUED	02/28/20	IMC	61,135.00	61,135.00	33,242.23	PROJECT
<input type="checkbox"/>	561	SMITHCO	DEMO-PM		ISSUED	01/26/21	IMC	150.00	150.00	0.00	PROJECT
<input type="checkbox"/>	560	SMITHCO	DEMO-PM		ISSUED	02/12/20	JTB	203,117.00	203,117.00	111,792.50	PROJECT
<input type="checkbox"/>	559	SMITHCO	DEMO-PM			/ /	BY OWNER	11,700.00	11,700.00	0.00	PROJECT
<input type="checkbox"/>	558	SMITHCO	DEMO-PM			/ /	SCOTT	2,047.00	2,047.00	0.00	JTB
<input type="checkbox"/>	557	SMITHCO	DEMO-PM			/ /	NATIONAL V	302.50	302.50	0.00	PROJECT
<input type="checkbox"/>	556	SMITHCO	DEMO-PM		ISSUED	01/14/20	AMANA	3,750.00	3,750.00	0.00	PROJECT
<input type="checkbox"/>	555	SMITHCO	DEMO-PROF		ISSUED	02/27/20	SOUTHFIELD	39,500.00	47,676.50	0.00	PROJECT
<input type="checkbox"/>	554	SMITHCO	DEMO-PROF			/ /	DURALEE	10,902.00	0.00	0.00	PROJECT
<input type="checkbox"/>	540	SMITHCO	DEMO-PM			/ /	IMC	25.00	25.00	0.00	PROJECT
<input type="checkbox"/>	539	SMITHCO	DEMO-PM			/ /	NATIONAL V	27.50	27.50	0.00	PROJECT

Order Details:
 PO#: 562 Revised: 09/09/20
 Issued by: Jim
 Sold by: Bisset, Jon
 Project: DEMO-PM Hastings Suites - Airport
 Client: SMITHCO The John Smith Companies
 Client Ref: [Redacted]
 PO Tax %: 0.000 Default Purch %: 5% Tax?

Vendor / Supplier:
 Vendor ID: IMC Imc Framed Art And Mirrors
 Billing type: Invoice us (resale) Invoice client directly (incl. internal clients) Invoice client, send to us "as agent"
 Tax quote: 4,349.45 Freight quote: 1,250.00

Shipping or Project Address:
 Client address Project address User-defined
 Attn: Jessica Fillmore
 Hastings Suites
 1235 700 S Grand Ave
 Los Angeles, CA 90017

Instructions to Vendor: Ship order...
 Directly to shipping/project address at left
 To another vendor:
 To staging/warehouse:
 Ship via:
 Note/Date: Deliver by 03/05/21
 Bill freight:
 FOB: Mgr: NONE

Vendor Deposit Requirements:
 Vndr Dep Inv #: Proforma Chk Request: N/A
 Vndr Inv Date: 07/15/20 Deposit paid: 0.00
 Mdse. deposit: 30,442.50 Dep. Check #: [Redacted]
 Freight deposit: 625.00 Check Date: / /
 Tax Deposit: 2,174.73 Request paid: N/A
 Total required: 33,242.23 Dep Applied:

Order Items:

#	Product/Type	Catalog #	Spec ID	Orig Qty	Final Qty	Unit	Cost	Sell
1	Art (Framed Photo) @ Sofa	ROBINSON PATTE	ART-02	53.00	53.00	ea	125.00	125.00
2	Art (Framed Photo) @ Lounge Chair	ROBINSON DEVIL	ART-03	50.00	50.00	ea	125.00	125.00
3	Art (Framed Photo) @ Luggage Bench	THE BELL TOWE	ART-04	106.00	108.00	S	125.00	125.00
4	Art (Guest Bath)	6989	ART-05	8.00	8.00	EA	125.00	125.00
5	Art (Framed Photo) @ Boardroom	ROBINSON UNIV	ART-10	1.00	1.00	Ea	125.00	125.00

Extended Totals: 61,135.00 61,135.00

Changes that affect an issued order create an automatic revision tracking note, which summarizing changes made to either the order header or individual items. This note can be printed on orders and in certain reports to help document changes.

Other revisions, such as splitting items or replacing them when a product is

out of production are handled directly by special editing buttons that maintain the audit record for the order.

Tax rates are transferred automatically from the source specification at the time the order is created on the FF&E Worksheet. This behavior can be turned off if users prefer to get a tax quote from a vendor instead. A freight

quote can be entered. Item amounts, taxes and freight are compared against what the vendor invoices in a reconciliation process.

Item Screen

Design/Purchasing version only

The Item screen appears when you add new items to an order (less common) or change the details of an individual item, including exceptions to the order's overall shipping schedule (this can be useful when splitting an item for phased shipping).

Most items are created automatically by using the **Order...** command on the FF&E Worksheet screen.

When you edit an item on an order that has already been issued, the system creates an automatic, dated note that tracks changes to critical items and in the multi-user version, who made them (changes to the "Add'l Descr" field will add a more generic note). You can also add specific revision notes for an item change that are added to the automatic one at the time of the revision

Revisions to *issued* orders are automatically printed in a "Revisions" section on orders when they are re-printed, and a revision date is printed next to each item that is affected. This can be suppressed when you re-print an order.

One feature that should be highlighted is that the "USAGE" reference at the end of the additional description was created automatically when the order was created, using information from the Design module. This is an option that can be set when the orders are created from the FF&E Worksheet.

On the right are two examples of the Items screen being used. The most common use is to edit order items that

were created from the FF&E Worksheet with that screen's **Order...** command. However, you can also add items manually, including special item types that may be needed when unexpected things occur during the expediting and vendor invoice reconciliation process.

Normal product items are processed outside of this screen using the regular **Processing** commands and the **Update Status** commands on the Expediting screen. Special items often occur at a point when the order is far along in the process, and so the screen allows certain status milestone entries that allow you to quickly process these.

For instance, an unexpected invoice for freight charges that was paid with a credit card would normally require the full process of entering the invoice, issuing a balance check request and entering that payment. With a special item, you can enter as much information as you have to bring the item's status current.

This shows an item being edited after the order was issued. As expediting milestones are updated, some elements on this screen represent "original" entries and cannot be changed.

Here, the Items form is being used to add a special item to the order. This is how unexpected charges like extra freight can be added after a regular invoice with freight (or not) was processed.

Expediting List

Design/Purchasing version only

The Expediting screen is the control center for managing the progress of orders once they are issued. The screen displays the requested shipping dates, vendor acknowledgments and other status entries. Once an item is shipped or received, you can quickly update that status.

The list also shows the current financials for each item.

All expediting fields are organized in a format that is oriented to the typical workflow for tracking the status of an item. The "PO Notes" field here is the same one visible on the Orders List screen, but automatically adds the current item number in addition to the date and user ID. Several expediting reports track project order status in different sort orders.

Two update buttons on the left allow you to record changes in order status. The "Update Item" button only affects the currently highlighted line item and can be invoked by double-clicking the screen or line in the list.

The "Update Order" version allows you to update all items with the same value (such as a "shipped" date) unless a previous entry has already been entered.

There is also a "Revise Item" button which performs the same function as it does on the Order Screen, allowing last minute corrections or revisions to an individual item. These changes may be limited by previously recorded shipping or billing activity.

The screenshot shows the 'Expediting List' window with the following components:

- Table:** A list of items with columns: Vendor, Client, Project, PO/CO, Itm.Split, Spec ID, Description, Catalog #, Qty, Unit Cost, Shpg Date, and Status. The selected row is: IMC SMITHCO DEMO-PM 561 1 ART-11 Art (Framed Photo) @ Boardroom LAUREL OAK II 1 Ea 125.00 SEE ITEM NC SHIPPED 01/25/21.
- Shipping Section:** Includes fields for Item shipping note/date, Vendor Ack (2542342342), Will ship date, Shipper (NONE), Pro #, Shipped on (01/25/21), Qty Shipped (1.00 Ea), and Container #.
- Delivery Section:** Includes fields for Deliv'd on/as of, Rcv'd to-date, and options for standard, custom, or no note.
- Vendor Section:** Displays 'IMC Framed Art and Mirrors'.
- PO Notes:** A text area for adding general or item-specific notes.
- Financials Section:** Shows Vendor Deposit (33,242.23 required), Balance request (N/A), Our invoice (N/A), Vendor invoice # (534), Invoice date (01/25/21), FF&E amount (125.00), Tax amount (9.62), Freight invoice #, Invoice date, Freight amount (12.50), Deposit applied (88.28), and Item balance due (58.84).
- Commands:** A vertical list on the left includes Update Item Status, Update Order Status, View Item, Revise Item, Unsplit Item, Process, Query, Print, Exit Form, and Quit.

The "Process" function on this screen is the same as is found on the Orders Screen, so that billing and payment recording functions can be performed from this screen, too.

Order items may include a "split" number to allow a more logical tracking of shipping splits and other variances that can happen as an order

is processed. This means that you can split an order item in two ways: 1) Before the order is issued, to allow for phasing of shipments that is known in advance (this splits the item to a new item number) and 2) To account for shipping splits and invoicing splits that occur during expediting of issued orders, which creates a sub-item of the

original to avoid confusion about which item was split).

If a shipped quantity is entered that is more than the original, it is treated as a variance. If less, you have the option of treating as a partial shipment (creating a split) or as a variance. Variances are final adjustments overriding the original quantity.

Client Invoices

Used to print invoices (or invoicing backup detail) to your clients and to record payments. If you are invoicing clients from a separate accounting system, you can use the “invoicing detail” option to print a detailed backing document instead of an invoice.

Project Closeout

This is used at the end of a project to mark all of its orders as “closed.” This removes them from the normal displays and from most reports, although this can be overridden.

Processing Setup

Process Type

Orders

Issue Orders

Re-print Orders

Vendor Deposits

Issue Vendor Deposit Requests

Enter Deposits to Vendors

Vendor Balances

Enter Vendor Final Invoices

Issue Vendor Balance Requests

Enter Vendor Balance Payments

Client Invoices

Print Client Invoices

Enter Client Invoice Payments

Project Closeout

Close Orders

Show tips

Vendor Invoice Information

Single PO #: AO40000005 100% Deposit If the invoice applies to one PO, enter the PO number, otherwise only select the vendor. Double-click for current PO.

...or vendor: FABTEX

Invoice #: Invoice date: / /

Amounts (USD) From Invoice	Inv Balance	Total Selected	Remaining
FF&E: 2,795.40	2,795.40	0.00	2,795.40
Freight: 65.00	65.00	0.00	65.00
Tax (0.00%):		0.00	0.00
Deposit: = 2,860.40	2,860.40	0.00	2,860.40
Balance: 0.00		0.00	0.00

Select order items to which invoice applies:

Enter PO #: AO40000000! Tax quote: 0.00 Deposit amt: 2,860.40

Freight quote: 65.00 Amt to apply: 2,860.40

Hide unshipped and/or already requested items Select all Unselect all

<input checked="" type="checkbox"/>	Item	Description	Inv Qty	FF&E Amt	Freight	Tax	^
<input type="checkbox"/>	1	DUAL WINDOW SHADE	1.00				
<input type="checkbox"/>	2	DUAL WINDOW SHADE	1.00				
<input type="checkbox"/>	3	MEASURING TRIP CHAR	1.00				
<input type="checkbox"/>	4	DUAL WINDOW SHADE	2.00				
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

Create memo for unapplied balance Mark open items as "shipped" as of invoice date. Count: 0

Printer: BROTHER HL-5250DN

Printer... Properties... Accept invoicing for selected items Close

The **Enter Vendor Final Invoices** command is an important function that processes incoming documents. It makes it easy to process the invoice for a single order, however it includes options that can be used for those with multiple orders. The command steps you through the process of comparing what the vendor invoiced to what FF&EZ “expects” to see, based on how you set up the order.

Request List

Design / Purchasing version only

This screen is used to manage check requests generated to pay vendors. It includes both deposit payment requests and balance payment requests.

Check requests are generated with the Processing module's **Issue Vendor Deposit Requests** and **Issue Vendor Balance Requests** commands. They represent the "official" numbers that FF&EZ has recorded. For balance requests, which are based on the order items, they represent numbers that have been reconciled

Generating deposit requests is not required, but can be useful if you want to maintain an audit trail in the system of what has been processed.

Balance requests are more important, since they represent the official, item-driven final amount owed to a vendor. This is based on deposits recorded and vendor invoicing that has been reconciled against the original order and any shipping differences, using the **Enter Vendor Final Invoices** process (see "Processing" earlier in this document).

For both types of requests, the Processing Setup screen includes an option to generate the requests without printing them to a printer or PDF file. This lets you indicate that the system has "seen" the vendor invoice and a request to pay it has been made.

You can use the **Print...** command on this screen to reprint check requests and to print lists of requests for management purposes.

Request List

Req ID>	Date	Type	Client ID	Project ID	Vendor ID	Name	Req Net Total	Amt Recvd	Stat	Last Pmt	Exp
52	01/26/21	Balance	SMITHCO	DEMO-PM	IMC	IMC Framed Art and Mirrors	88.27	0.00		/ /	N
51	01/26/21	Balance	SMITHCO	DEMO-PM	IMC	IMC Framed Art and Mirrors	0.00	0.00	Void	/ /	N
50	01/26/21	Deposit	SMITHCO	DEMO-PM	IMC	IMC Framed Art and Mirrors	88.28	88.28	Paid	01/26/21	N
49	02/12/20	Deposit	SMITHCO	DEMO-PM	JTB	JOHNSTON TOMBIGBEE FURNITURE	111,792.50	0.00		/ /	N
48	01/14/20	Balance	SMITHCO	DEMO-PM	AMANA	AMANA SOUTHEAST	2,181.25	2,181.25	Paid	01/14/20	N
47	01/14/20	Deposit	SMITHCO	DEMO-PM	AMANA	AMANA SOUTHEAST	2,131.25	2,131.25	Paid	01/14/20	N

Request Item Detail

PO #	Item	Split	Description	Qty	Amount	Tax	Freight	Dep Applied	Net Total
561	All		Initial order deposit	1.00	75.00	5.78	7.50	88.28	88.28

Checks Received

Check #: Credit Card Check date: 01/26/21 Entered: 01/26/21 Deposit received: 88.28

Once check request have been created, the **Export...** command allows you to export that data, including an option to export it as a marked transaction (meaning that it won't be exported again).

Invoice List

Design / Purchasing version only

This screen is used to manage invoices you have generated to your clients. This may be for the sell price of the FF&E you are selling to them or for the cost-based purchasing management fee percentage. You can also generate invoices for fixed fees, using a special purchase order with you as the “vendor,” but fixed fee invoicing is normally simpler to do within your accounting system.

Invoices are generated with the Processing module’s **Print Client Invoices** commands. They are based on the status of the items that you have processed: either “issued,” “shipped” or “received.”

You can use the **Print...** command on this screen to reprint invoices and to print lists of invoices for management purposes.

Once invoices have been created, the **Export...** command allows you to export that data, including an option to export it as a marked transaction (meaning that it won’t be exported again).

FF&E Design / Purchasing | Version 4.2.34

Invoice List

Inv #>	Date	Client ID	Name	Project ID	Title	Inv Total	Paid	Status	Last Pmt	Exp
229	01/14/20	SMITHCO	The John Smith Companies	DEMO-PM	Hastings Suites - Airport	187.50	0.00		/ /	N
227	08/29/19	SMITHCO	The John Smith Companies	DEMO-PROF	Hastings Suites - Downtown	3,280.25	0.00		/ /	Y

Find: using this order: Go Search in: for: Find Next Find all A A

Invoice #: 227 Notes:
 Invoice Date: 08/29/19
 Terms:

Payment amounts shown below are for the currently highlighted line item/split. To enter payments, use the "Processing" option on the Orders screen.
 Exported: 08/29/19 11:09:24 PM
 Voided: / /

Invoice Item Detail

Order #	Item	Split	Spec ID	Description	Qty	Amount	Ext. Total	Tax	Freight	Total
526	1		CASE-20	Board Room Conference Table	1.00	1466	3,149.00	0.00	0.00	3,149.00
527	1		LIGHT-102	Ceiling Pendant (Board Room)	1.00	1468	62.50	0.00	0.00	62.50
528	1		LIGHT-104	Wall Sconce (Board & Conf Rooms)	1.00	1470	68.75	0.00	0.00	68.75

Payments Applied

Check #: Check date: / / Entered: / / Deposit applied: 0.00 Amount applied: 0.00

Print... Exit Form Quit Tips