## **FF&E<sup>Z</sup> 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

FF&EZ - A Specifi	cations Tool for Desig	gn Professionals								-	- 0	×
	Vendor List	t										
Views	ID>	Alt ID	Name		Loc	ation	Contact		Phone	Fax	Type	^
Vandara	SCOTTLAMP		Scott Lamp		St. Louis, MO		Judd Belson		314-569-3300	314-993-9624		
vendors	SERTA	4420	SERTA MATTRESS COMPANY		BATESVILLE, MS		GENE GIANINI		888-773-3109	901-759-5137		
Library	SHAW		SHAW INDUSTRIES				RODNEY BAUMG	ARDNEF	854-7163	854-7332		
Library	SHELBY		Shelby Williams Corporation - N. America	I	Morristown, Tn		Paul Smith		234-234-2342	234-234-2344		
Clients	SIGNATURE	6024	SIGNATURE HOSPITALITY CARPETS		CHATSWORTH, G/	4	BOB THOMAS		800-809-7086	706-517-0391		
0.10110	SLOAN		Sloan									
Projects	SODIR		Sodir									
A	SONY		Sony Electronics									
Areas	SOUTHERN A		SOUTHERN ALUMINUM		Magnolia, Ar		Robert Scallions		1-901-755-2543	1-901-755-0331		
Rooms	SOUTHFIELD		SOUTHFIELD FURNITURE		HIGH POINT, NC		DALE JONES		901-757-4040	901-757-0606		
EE&E Mkoht	SPONGE CUS		SPONGE CUSHION, INC.		MORRIS, IL		DALE JONES		901-757-4040	901-757-0606		
I-I-oke vvisalit	SUMMIT		Summit Furniture		, CA		Selah Chavet		310-289-1266	310-289-1257		<u> </u>
Objects	SWAVELLE	SWAVELLE/M	SWAVELLE/MILLCREEK FABRICS		NEW YORK, NY		KEN PLEASANTS	3	901-854-7472	901-854-7472		
Specs	TBD		To Be Determined									
0.1	TBPBO		To Be Provided by Owner									$\perp$
Orders	TEC		TEC Inc.			-						$\vdash$
	THOMASVILL		THOMASVILLE FURNITURE IND.		THOMASVILLE, NO		BOB CAMPBELL		770-475-8967	770-475-0128		$\vdash$
	THOMASVLLE		THOMASVILLE FURNITURE IND.		THOMASVILLE, NO	;	BOB CAMPBELL		770-475-8967	770-475-0128		L ~
Orders	<u>F</u> ind: art	using	g this order: Vendor ID 🗸 Go		Search in:		✓ for:		Find	Next Find all	A	Α
Expediting												
Invoices	General	For manufacture	rs, reps or suppliers as needed	Special 1	lags:							
	Vondor ID:	SHELBV	Alternate ID:	🛛 🗌 Freig	iht line	Supplier	nreserve address	ade to a	vendor affect all spe acts in old projects	create "new" versions	ou need to with the (	) Clone
Chk Req's	vendor iD.	SHELDT	Allemate ID.	□ Stag	ing/warehouse	Obsolete	command to use	in newer	projects.	orcate new verbione	i mar are e	none
	Name:	Shelby Williams	Corporation - N. America									
Commands	Oratest			Main Ad	dress			Alter	nate Addresses	• • • • • • •		
	Contact:	Paul	Last: Smith	Ctr	P.O. Box 1	128		Altern	ate addresses a	re independent of o	other	
Add	Dhono 1:	234 234 2342	2	30		520		Inform	lation on this scre	een. Include compl	ete vend	or
Edit	FIIONE I.	234-234-2342	2.					name	, recipient, etc. w	nen entering an alt	emale	
Lan	Fax:	234-234-2344						auure	55.			
<u>C</u> lone				City/Loca	lity: Morristown			🗹 Us	e main address	at left		
	E-Mail:			Ctoto /D	To	Deatel Code	37816,1028					
Delete	Mah aita:			State/P	IOV.	Postal Code.	37010-1020					
	web site.			Coun	try:		ISO <sup>,</sup>					
	Manufactur	or Use this of	oction when the "General"									
Reassign	Manufactur	information	is for a manufacturor's ron	Ter								
		mormation	ris lor a manulacturer s lep.	ler	ms.	Cur	rency:					
Export	Contact:		Last:	Net cos	st is 100.00	% of catalog co	ost					
Import list	Phone			100 000								
import list	Fliune.			Last Cata	log: 05/30/88	Exempt f	rom VAT		5	Shipping		
	Fax:			Comm	ent:	_						
Query				Comm					Ordering: Currer	ntly set to "Main Ad	dress"	
Drint	E-Mail:								-	•		
Print								D-		a set to llogade size a l	A	

Auto-add 🗹 Tips

use in viewing records and printing reports.

Web site:

Exit Form

Quit

- 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.

Payments: Currently set to "Ordering Address"

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 Pr	ofessionals					
	Library List						
<u>V</u> iews	Vendor>	Cat #	Туре	Code I	Cost	Price	Lead 🔼
Vendors	All-Iron, Inc.	CDX-123	CHAIR, EXECUTIVE		1200.00	1200.00	4
	All-Iron, Inc.	CDX-123A	CHAIR, EXECUTIVE		1200.00	1320.00	4
Library	Art Horizons	HBR18	Artwork, "Killarney Harbor"		53.00	63.60	0
Clients	Casa Stradivari	VLK234	TABLE, LAMP		750.00	825.00	0
Dreisete	ECKO International	3400	Mirror, "Europa" wall	I I I	167.92	210.00	0
Projects	Knoll International	CUSTOM	CHAIR, ARMLESS, CASTERS		250.00	275.00	5
Areas	Knoll International	D-2342	DESK, EXECUTIVE		1000.00	1100.00	0
Rooms	Knoll International	KJ3-3434	DESK, EXECUTIVE, LAMINATE	CSCI	650.00	722.22	13
FF&E	Shelby Williams	CE-220			138.19	152.01	-
Objects	Sheipy Williams	A00111		usa	200.00	200.00	/
Specs	Strong Industries, Inc.	XC-2342	CHAIR, CONFERENCE, LEATHER	++	1080.00	1188.00	10
Orders	To Be Determined		Fabric prototype	++	0.00	0.00	<u> </u>
Olders				+ +			<b>~</b>
	Eind: using this ord	er: Vendor Name 🛛 💌 G	30 Search in: 💽 for:		Find Next	Find all	AA
Orders							
Expediting	General				Utilities		
Invoices	Type: CHAIR, EXECUT		Code: Spec'l Item #		Volts/Phs	в:	
Chk Req's	Unit of meas: EA		Size:		Load	4:	
	Vendor ID: ALLIRON	New 🚹	Weight: 50 lbs	-	Conn Type	a.	
Commands	All-Iron, Inc.		Color Plum				
<u>A</u> dd	Cotolog (Madel # CDV 122				Gas	5	
Edit	Catalog/Model #. CDA-125		Mat'l/Fin: 100% Wool	Material	spec CFM/BT	U	
			Other Descr:		🗾 🔺 Hot Wt	r:	
	Prototype use: Use as a "prot	otype" template			Cold Wt	r:	
Delete	Ose as placeholde	er for Spec IDs starting v	with:				
					VVaste	e:	
	Pricing				image		
	Catalon Cost: 1200.00 E	ch Lead Time	4 weeks				
Evport		ich Leau finte.				$\overline{}$	
Even	Add'l Opts: 0.00					$\sim$	
Import List	Total Cost: 1 200 00					$^{\sim}$	
Query	1,200.00					~	
Print	Markup: 0.00	0.00 %					
	Duis au 1 200 00	1			Select		
Exit Form	Price: 1,200.00	Lock			✓		
Quit						Auto-ad	ld 🔽 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 / P	Purchasing   Version 4.2.34							-	
	Client List								
Views	ID>	1	lame		Location	Contact	Phone	Fax	^
Vendere	CAMBER	CAMBER HOSPITALITY, LLC		TUSCALOOSA, AL		TOBY WILSON	205-246-1355		
vendors	DEMO GRP	Demonstration Group, LLC		Nashville, TN		John Smyth			
Library	LRF	LRF PROPERTIES		OXBOW, MI		Luke Franklin	601-541-6351		
	WHTHAT	White Hat Group		Atlanta, GA		Lawrence Downer			
Clients	WILCO	Wilco Hospitality		Los Angeles, CA		Dave Wilco	205-246-1355		
<b>D</b> : /	WINWOOD	WINWOOD HOSPITALITY		RALEIGH, NC		P.K. PATEL	919-468-9190	(117	
Projects		Hotel Group XYZ							
Areas	TOORTINI	rour Design Finn							
Rooms									
FF&E Wksht									
Objects									
Specs									
Orders									
010010									
Orders									
Expediting	1								
Invoices	-								
invoices									v
Check Req's	<u>F</u> ind:	using this order: Cl	ient ID 🗸 🗸 Go	Search in:	✓ for:		Find Next	Find all	A A
Commands									
	General				Addresses				
Add	Client II	D: DEMO GRP			Street: 357 D	emonbreun	b	ecome the defaults	ere for all of
<u>E</u> dit	Compan	y: Demonstration Group, I	LLC		Sileei. Oor Di	Smonorean	ti	his client's projects ( rders in the Purchas	(and sing
<u>C</u> lone							n	nodule) unless you o	override
Delete	Contac	t John Last S	myth		City/Locality: Nashv	lle	ti	nem on those scree	ns.
	Billing Contac	t Last			State/Province: TN	Postal Code: 37	204		
	Phone	1:	Account #:		Country:	ISO:	a	ffect all of their proj	ects. If
	Phone	2.	Terms:		Shipping: 🗔 Use	main address shows	y n	ou need to preserve ame, address and c	the contacts in
	Ea		Purch'a Fee %	%	Shipping. ⊵ Ose		0	ld projects, create " ersions with the Clo	'new" ne
Import		<b>.</b>	Turcing roo /u.	//			, ,	ommand to use in n	newer
import list	E-Ma		tax ID:				ρ	rujecis.	
Query	Commer	nt 🔤					E	le sure to include th	e recipient
Print							n	ame in any alternate	e address.
Exit Form									
Quit	1							Auto-add	d 🖂 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



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 subproject 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 / P	urchasing   Version 4.2.34											- 0
	Project Area List											
Views	4	Area ID>			Contact		Phone		Sub-project	Grou	up Bu	Idget
Vendors	Administration								001			0
Vendors	Back Of House								001			0
Library	Commercial								001			0
	Convention Center								001			0
Clients	Exterior Curet Deserve								001			0
Projects	[Other]								001			0
Areas												
Rooms												
FF&F Wksht												
Objects												
Specs	_											
Orders												
Orders												
Expediting												
Invoices												
Check Req's												
Commande												
Commanus												
Add	Eind:	using this order: G	roup Code	✓ Go		Search in:		✓ for:		Find	Next Find all	A
<u>E</u> dit		[										
Delete	_				Room List:							
	Area ID: G	uest Rooms			Room ID		Name		Budget		Contact	Rm Qty
	Sub project	04			C SU	Suite, Corner			2300	0.00		17
	Sub-project.				GUESTRM	Guest Room				0.00		1
	Group Code:				KSIE	King Suite				0.00		9
					K STE ADAS	King Suite AD	A w/Shower			0.00		1
	Budget:	0.00			K STE/DD	King Ste w/ /D	ivider Desk			0.00		9
					KING	King Room - A	lternate			0.00		18
	Contact:	Last			KING ADA	King ADA				0.00		1
Query	Phone:				NING SUFA					0.00		9
Drint	1 10/10.					Queen/Queen	ADA			0.00		- 41
Print	Area (size):	0 Sq Ft			Q/Q EXT	Queen/Queen	Extended			0.00		8
Close Project	. /											
Quit	Project: DEMO PPO	)F   Hastings Suites	- Downtow	wn Lloe A	ngeles Califo	rnia						ut 🖂 bbe-otuA
	HOJECI. DEWIO-PRU	n nasungs suites	- Downtov	MI   LOS A	ingeles, callio	inna					F	uto-auu ⊵i Hp

#### **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

🕌 FF&EZ Design / P	urchasing   Version 4	4.2.34													- 0
	Project Ro	oom List													
Views		Area ID>		Room II	)	Name		Phase	Code	Bu	dget	Qty*	Ext Budget	Ext Cost	Ext Price /
Vondore	Commercial		VI	ENDING 6	Vending -	6th Fl		1				0 1	0	211	255
vendors	Commercial		W	OMEN'S 1	Women's	Room - 1st Fl		1				0 1	0	307	393
Library	Commercial		v	OMEN'S 2	Women's	Room - 2nd Fl	1	1				0 1	0	387	476
Elbrary	Guest Rooms		C	SU	Suite, Cor	ner		1			23,00	0 17	391,000	208,801	254,344
Clients	Guest Rooms		G	UEST RM	Guest Roo	m		1				0 1	0	1,524	1,839
	Guest Rooms		K	STE	King Suite			1				09	0	59,103	71,685
Projects	Guest Rooms		к	STE ADAS	King Suite	ADA w/Show	ver	1			1	0 1	0	7,559	9,159
Δreas	Guest Rooms		K	STE/DD	King Ste v	// /Divider Des	sk	1		_		09	0	62,298	75,547
Alcas	Guest Rooms		K	NG	King Roor	n - Alternate		1				0 18	0	102,150	124,161
Rooms	Guest Rooms		K	NG ADA	King ADA			1				0 1	0	5,385	6,545
FF&E Wksht	Guest Rooms		K	NG SOFA	King Sofa			1				0 9	0	50,877	61,959
Ohiosha	Guest Rooms		Q		Queen/Qu	een		1				0 41	0	270,908	327,919
Objects	Guest Rooms				Queen/Qu	een ADA		1				0 0	0	33,650	40,826
Specs	Guest Rooms				Queen/Qu	een Extended		4					0	50,120	60,077
Orders	Guest Rooms				Queen/Qu	een Large		4				0 9	0	54,030	00,147
	Eind:		using this ord	er: Area II	D ~	Go	Search	in:		~	for:		F	ind Next Fir	nd all A A
Ordore	A						Dhoco			Totals	Area	ı: 142	391,00	0 976,146	1,184,795
Orders	Area ID.	Guest Rooms	5		× 1	lew	Flidse.	1	$\sim$		Project	:: 142	404,40	0 1,150,233	1,395,601
Expediting	Room ID:	C SU				I	Room Code:								
Invoices	Name	Suite, Corne	r			Budg	et per room:	23	00.00	=			Contact:	Last:	
Check Req's	Room Otv	17 🖂 *inc	lude in roor	n count to	tal2	_	Area (size):		0	Sa Ft			Phone:		
Commands				in count to			(,-								
Add	Contents:												Objects can be	added to a room usi	ng the FF&E Workshee
	Tag		Descri	ption	Pri	nary Vendor	Quantity	Budg	jet	Extended		Cost:	Extended	Price	Extended ^
<u>E</u> dit	ACC-02	Bath Acces	sories Packa	ge	GATC	0	1.00		380		380	291.35	291	.35 351.66	351.66
Clone	ACC-03	Mirror, Deco	orative		CENT	URY	1.00		230		230	175.00	175	.00 211.22	211.22
	ACC-05	Mirror, Full	Length		CARC	LINA M	1.00		76		76	59.00	59	.00 71.21	71.21
Delete	ACC-06	Finale Vase	s		INTER	R-HOME	1.00		390		390	299.00	299	.00 360.89	360.89
	ACC-07	Ball finial			GREA	AT CITY	1.00		110		110	85.00	85	.00 102.59	102.59
	ACC-08	Accessory	@ Cocktail Ta	able	CRYS	TAL CL	1.00		3		3	2.75	2	.75 3.32	3.32
	ACC-09	Ball finial			GREA	T CITY	2.00		150		300	110.00	220	.00 132.77	265.54
	ACC-10	Weather Va	ne, Windsor	Garden	INTER	R-HOME	1.00		130		130	99.00	99	.00 119.49	119.49
	ART-02	Art (Frame	d Photo) @ S	ofa	IMC		1.00		200		200	150.00	150	.00 203.44	203.44
	ART-02B	Art @ Testi	ng Lab		TBD		1.00		0		0	0.00	0	.00 0.00	0.00
	ART-03	Art (Frame	d Photo) @ F	ainting Cour	ch IMC		1.00		200		200	150.00	150	.00 203.44	203.44
	ART-04	Art (Framed	1 Photo) @L	uggage Ben	ich IMC		1.00		200		200	150.00	150	.00 189.66	189.66
Query	AR1-04.1	Artwork, Fre	ench Garden	riaque	BALL		1.00		110		110	80.00	80	.00 96.56	96.56
	ART-04.2	Artwork, "S	ummer Shado	)WS <sup>III</sup>	ARTH		1.00		140		140	106.00	106	.00 127.94	127.94
Print	BED-01	Bed Base (			LEGO		1.00		50		00 20	45.00	45	.00 54.31	54.31
Close Project	000-03	Ded Flame		(ins)	LEGO		1.00		39		23	30.00	30	36.21	30.21 V
Quit	Project: DE	MO-PROF	Hastings S	Suites - D	owntown   Lo	os Angeles	, California								🗌 Auto-add 🗹 Tips
			-			-									

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 / Po	urchasing   Version 4	.2.34												- 0	ı ×
	FF&E Wor	ksheet	t												
Views	Area ID>	Phs	Class	Room ID	Finish Locn	Object			Description		Primary Vnd	r Primary Spe	c Qty / Room Unit	P.O. #	^
Mandara	Guest Rooms	1	FRN	C SU		LIGHT-04	Pend	lant			CANDELLA	LIGHT-04	1.00 Each		T
vendors	Guest Rooms	1	FRN	C SU		LIGHT-05	Wall	Sconce, Tapered			TOP BRASS	LIGHT-05	2.00 Each		-
Library	Guest Rooms	1	FRN	C SU		LIGHT-06	Wall	Sconce			SCOTTLAMP	LIGHT-06	2.00 Each		—
Library	Guest Rooms	1	FRN	C SU		PILLOW-01	Throw	N Pillows (Sleepe	r Chaise)		KELLEX-N	PILLOW-01	2.00 Each		T
Clients	Guest Rooms	1	FRN	C SU		PILLOW-02	Lumb	oar Pillows (Gues	t Rooms)		TBD	PILLOW-02	2.00 Each		T
	Guest Rooms	1	FRN	C SU		PLANT-01	Plant	/ Planter (Guest	Rooms)		LABS	PLANT-01	1.00 Each		
Projects	Guest Rooms	1	FRN	C SU		SEAT-01	Slee	per Chaise (R)			KELLEX-N	SEAT-01	1.00 Each		
A	Guest Rooms	1	FRN	C SU		SEAT-02	Slee	per Chaise (L)			KELLEX-N	SEAT-02	1.00 Each		_
Areas	Guest Rooms	1	FRN	C SU		SEAT-03	Ergo	Task Chair			SOUTHFIELD	SEAT-03	2.00 Each	555	_
Rooms	Guest Rooms	1	FRN	C SU		SEAT-04	Side	Chair (@ Desk)			SOUTHFIELD	SEAT-04	2.00 Each		_
FF&F Wksht	Guest Rooms	1	FRN	C SU		SEAT-05	Ottor	nan / Coffee Tabl	e		SOUTHFIELD	SEAT-05	1.00 Each		_
TT GE TTRAIT	Guest Rooms	1	FRN	C SU		TABLE-01	Table	a, Cocktail			CENTURY	TABLE-01	1.00 Each		_
Objects	Guest Rooms	1	FRN	C SU		TABLE-02	Table	a, Console			CENTURY	TABLE-02	1.00 Each		_
Specs	Guest Rooms	1	FRN	C SU		WIN-01	Wind	low Treatment (G	uest Rooms)		CDS INC	WIN-01	1.00 Each		+
Ordere	Guest Rooms	1	FRN	C SU		WIN-02	Wind	iow Blinds			GRABER IND	WIN-02	1.00 Each		+
Orders	Guest Rooms	1	FRN	C SU		XTRA-01	Own	er Supplied Items			ТВРВО	XIRA-01	1.00 Each		
	Guest Rooms	1	ACC	K STE		ACC-06	Final	e Vases			INTER-HOME	ACC-06	1.00 Lot	582	+
	Guest Rooms	1	FIN	K STE		CPT-04	Cust	om Carpet			DESIGN ORI	CPT-04	1.00 Sq Yd		+
Orders	Guest Rooms	1	FIN	KSIE	Floor	CPT-01	Carp	et (Guest Rooms)	)		SIGNATURE	CPT-01	1.00 Sq Ya		+
Eurodition	Guest Rooms	1	FIN	KSIE	Floor	CPIB-01	Carp	et Base (Guest R	looms)		SIGNATURE	CPIB-01	1.00 LIN FT		+
Expediting	Guest Rooms	1	FIN	KSIE	Floor	PAD-01	Carp	et Pad (Guest Ro	ioms)		LEGGET & P	PAD-01	1.00 Sq Yd		+
Invoices	Guest Rooms	1	FIN	KSIE	vvall	VWC-01	VVVC	(Guest Room Ba	aths)		EYKON	VVVC-01	1.00 Lin Ya		
Check Reg's	Guest Rooms	1	FRN	KSIE		ART-02	Art (	Framed Photo) (a	y Sofa			ART-02	1.00 Each		-
	Guest Rooms	1	FRN	K STE		BED-01	Ded	Dase (King)				BED-01	2.00 Each		+
	Guest Rooms	1	FRN	K STE		DED-05	King	Mattress / Doxsp	orings		SERIA	CASE 01	1.00 SET		+
Commands	Guest Rooms	1	EDN	K STE		CASE-01	Night	totand (24"w V 29	"b)			CASE 03	2.00 Each		+
Δdd	Guest Rooms	1	EDN	K STE		CASE 10	Evos	stanu (24 w A 20	- 11)			CASE-10	1.00 Each		+
<u></u> uu	Guest Rooms	1	FDN	KSTE		CASE-10	TV /	VCP Chest			ITB	CASE-10	1.00 Each		+
<u>E</u> dit	Guest Rooms	1	FDN	K STE		CASE-15	End	Table			ITB	CASE-15	1.00 Each		+
	Guest Rooms	1	FRN	K STE		CASE-17	Bath	Vanity Base (Ba	se Only)		ITB	CASE-17	1.00 Each		+
Replace		1.	1	IN OIL			Duti	Vality Base (Ba	ue entry						+*
<u>C</u> lone	Eind:		us	sing this order:	Area ID	✓ Go		Search in:		for:		F	ind Next Find all	A	A
Delete														ast save: (	08/10/08
	FF&E Sum	nary		Mode: (	Budgeting 💿	Cost/Sell		Budget	Total Obj. Cost	Tot	al Obj. Sell	Profit Margin	the second second		
Order	Project						1.3	300 000	1 148 709	1 39	3 762	17.6%			and the state
	Area	Guest F	looms					0	157 388	10	0 549	17.4%	****	-	and the second
	Boom	King St	ito				0 Dmc	0	12 552		5 220	17.6%			1000
Utilities	Chiest	King St	iiie 				9 KIIIS	200	12,000		3,230	17.0%	and the second sec	Sec. 1	
	Spec(s):	AIL (FI	amed P	nolo) @ Sola	Type	Ven	dor ID	200 Catalog #	130 Otv/ObiUnit	Cos	103 t F	17.1%			
<u>w</u> uci y		ART-02		Art (Framed Ph	oto) @ Sofa	IMC		HJCV MS BARC	GE 1.00000 ea		125.00	159.49		-	
Print		FRAME-	01 F	rame	,0	DECOR	ł	9654	1.00000 Ea		25.00	43.95			
Close Project												¥			
Quit	Project: DE	MO-PRO	DF   H	astings Suit	es - Downtow	n   Los Ange	eles, Ca	lifornia				Show	images 🗹 Auto-sum 🗌 A	wto-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.

	Select area:			Curr	ent conten	ts of room K	STE	Status: Addi	ng an occurrence	to the selected
Views	Administration		^	Class	Fin. Loc'n	Tag	Description	Vendor	Qty/Rm	Ext. Price
Vendors	Back Of House	e					<< ITEM WILL BE ADDED TO THIS ROOM >>			0.0
Vendors	Commercial	nter		ACC		ACC-06	Finale Vases	INTER-HOME	1.0	360.5
Library	Exterior	nter		FIN		CPT-04	Custom Carpet	DESIGN ORI	1.0	54.3
or (	Guest Rooms			FIN	Floor	CPT-01	Carpet (Guest Rooms)	SIGNATURE	1.0	42.3
Clients	[Other]			FIN	Floor	CPTB-01	Carpet Base (Guest Rooms)	SIGNATURE	1.0	42.3
Projects			· •	FIN	Floor	PAD-01	Carpet Pad (Guest Rooms)	LEGGET & P	1.0	14./
i iojecis		Create New Area		FIN	Wall	VWC-01	VWC (Guest Room Baths)	EYKON	1.0	36.
Areas				FRN		ART-02	Art (Framed Photo) @ Sofa	IMC	10	203
Rooms	Select roon	n:		FRN		BED-01	Bed Base (King)	LEGGETT	2.0	108
FERE Wikeht	C SU	Suite, Corner	^	FDN		BED 05	King Mattress / Boysprings	SEDTA	1.0	724
FFOE WKSIIL	GUEST RM	Guest Room		EDN			King Mattress / Doxsprings	JERIA	1.0	124
Objects	K STE	King Suite		FRIN		CASE-01	Headboard (King)	JID	1.0	90
Specs	K STE ADAS	King Suite ADA w/Shower		FRN		CASE-03	Nightstand (24"w X 28"h)	JIB	2.0	307
Ordere	K STE/DD	King Ste w/ /Divider Desk		FRN		CASE-10	Executive Desk	JTB	1.0	429
Orders		King Room - Alternate		FRN		CASE-12	TV / VCR Chest	JTB	1.0	424
	KING SOFA	King Sofa		FRN		CASE-15	End Table	JTB	1.0	274
	Q/Q	Queen/Queen	~	FRN		CASE-17	Bath Vanity Base (Base Only)	JTB	1.0	419
Orders				FRN		CASE-49	Towel Box Shelf (Queen/Queen)	JTB	1.0	14
Expediting		Create New <u>R</u> oom		FRN		COVER-01	White Bed Covers (King)	TBD	1.0	90
Invoises	Object (tag	) to place:		FRN		DUST-01	Dust Skirt (King)	CDS INC	1.0	90
invoices				FRN		LAMP-01	End Table Lamp	ASHLEY	1.0	42
Check Req's	ART-02	Art (Framed Photo) @ Sofa	^	FRN		LAMP-02	Floor Lamp	ASHLEY	10	42
	ART-02A	Art @ Testing Lab		FDN			Desk Lamp (Double Light)	ASHLEY	1.0	42
ommands	ART-03	Art (Framed Photo) @ Fainting Couch		EDN			Vanity Bar Light (Guest Baths)	TROV	1.0	
-	ART-04	Art (Framed Photo) @ Luggage Bench		EDN		LIGHT-002	Cailing Light (Guest Estar)	PROVINEE	1.0	00
<u>S</u> ave	ART-04.1	Artwork, French Garden Plaque		FRN		LIGHT-004	Celling Light (Guest Entry)	BROWNLEE	1.0	60
0	ART-04.2	Artwork, "Summer Shadows"		FRN		LIGHT-005	Ceiling Light (Guest Bath)	BROWNLEE	1.0	60
Save	ART-05	Art (Guest Bath)		FRN		LIGHT-006	S/A Wall Lights (Night Stands/Lug Bench)	ASHLEY	2.0	120
Auto-aud	ART-10	Art (Framed Photo) @ Boardroom		FRN		MIR-05	Vanity Mirror (Guest Rooms)	IMC	1.0	96
Canaal	ART-11	Art (Framed Photo) @ Boardroom		FRN		MIR-06	Mirror @ Standard Desk	IMC	1.0	96
Cancel	ART-12 ART-13	Art (Framed Photo) @ Lobby		FRN		MIR-08	Wet Bar Mirror (Guest Rooms)	IMC	1.0	96
	ART-14	Art (Framed Photos) @ Entry Vestibule		FRN		PILLOW-01	Throw Pillows (Sleeper Chaise)	KELLEX-N	1.0	35
	ART-15	Art (Framed Photo) @ Lobby		FRN		PILLOW-02	Lumbar Pillows (Guest Rooms)	TBD	1.0	17
	ART-16	Art (Framed Photo) @ Lobby		FRN		PLANT-01	Plant / Planter (Guest Rooms)	LABS	1.0	90
	ART-17	Art (Framed Photo) @ 1st FI Lobby Sofa	s	FRN		PLANT-02	Silk Floral (Guest Rooms)	LABS	10	90
	ART-18	Art (Framed Photo) @ 1st FI Lobby Sofa	s	FDN		SEAT.03	Erro Task Chair	SOLITHEIELD	1.0	385
	ART-19	IArt (Framed Photo) @ 1st FI Flev I obby	· ·	EDN		SEAT 04	Side Chair (@ Deek)		1.0	330
		Create New Object				SEAT-04	Ottoman (Coffee Table		1.0	330
	1			FRN		SEAT-05	Ottoman / Coffee Table	SOUTHFIELD	1.0	226
	Quantity use	ed per room:	1.00	FRN		WIN-01	Window Treatment (Guest Rooms)	CDS INC	2.0	1,523
			-	FRN		WIN-01A	Stationary Side Panels	CDS INC	2 0	253
	Location of	finish in room:	~				Show. O Budgets	Total for 0 re-		7,9
ose Project								Iotal for 9 rooms		/1,6

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 Specifi	ications Tool for Design Pro	fessionals								- 🗆	×
	Project Object	List									
Views	Tag>		Description	Primary Vndr	Primary Spec	Typ'l Use	Code Bu	idget Co	st	Total Price	^
Vondore	PLANT-04	Planter (Pool)		ELEMENTS	PLANT-04	POOL	OSOI	96.00	75.00	75.00	
Vendors	PLANT-05	Plant (Bd. Rm)		DISTINCTIV	PLANT-05	BD ROOM		96.00	75.00	75.00	_
Library	PLANT-06	Plant (Lobby)		DISTINCTIV	PLANT-06	LOBBY		96.00	75.00	75.00	_
Library	PLANT-07	Plant (Lobby)		LABS	PLANT-07	LOBBY		96.00	75.00	75.00	_
Clients	PLANT-08	PLANT (Exercise Roor	n)	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	_
Projects	PT-01	Paint For Walls		BENMOORE	PT-01	C SU		0.00	0.00	0.00	_
Areas	PT-03	Paint Between Crown &	Trim	BENMOORE	PT-03	C SU		0.00	0.00	0.00	_
Aleas	PT-06	Paint For Ceilings		BENMOORE	PT-06	C SU		0.00	0.00	0.00	_
Rooms	PT-07	Paint For Bath Ceilings		BENMOORE	PT-07	C SU		0.00	0.00	0.00	-
FE&E Wksht	PT-08	Paint		TOABO-X	PT-08	C SU		0.00	0.00	0.00	
TT GE WRSh	SEAT-02	Sleeper Chaise (L)		KELLEX/N	SEAT-02	C SU	OSOI	640.00	565.00	565.00	
Objects	SEAT-03	Ergo Task Chair		SOUTHFIELD	SEAT-03	Q/Q SUITE	OSOI	350.00	273.00	273.00	-
Specs	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	_
Orders	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	- 11
	SEAT-07	Ottoman		SOUTHFIELD	SEAT-07	Q/Q EXT	OSOI	240.00	188.00	188.00	- 11
Orders	SEAT-08	Luggage Bench		JTB	SEAT-08	Q/Q LARGE	OSOI	320.00	248.00	248.00	-
<b>-</b>	SEAT-09	Sleeper Chair		KELLEX/N	SEAT-09	KING		350.00	273.00	273.00	-
Expediting	SEAT-09A	Window Seat Cushion		CDS INC	SEAT-09A	Q/Q SUITE		51.00	40.00	40.00	_
Invoices	SEAT-10	Executive (Board Roon	n)	SOUTHFIELD	SEAT-10	BD ROOM	OSOI	570.00	446.00	446.00	
Chk Reg's	SEAT-11	IClub Chair (Business C	enter)	IFKO	ISFAI-11	IBUSINESS I	OSOL I	350.001	273.001	2/3 001	-
Olik Nega	<u>F</u> ind: sea	using this orde	r: Tag	Go Search	n in:	✓ for:		Find Next	Find all	A A	<b>L</b>
Commands	Tag	SEAT 02	Close: EDA	Code: OS					_		
Add	Deseriation:			Code. OC		Notes.					
-	Description.	Sleeper Chaise (L)									
Edit		Use component #	1 "Type/Product" in the	e worksheet and reports	5.						
<u>C</u> lone	Unit of measure:	Each									
Delete	Budget:	640.00									
											<u> </u>
		Components fo	r SEAT-02			You	can modify the compone	ent list without editing	) the object Object" can	fields. Double-cli be entered direc	ick tlv
	Maria	# Spec ID	Tv	rpe	Vendor ID	Catalog #	Cost	Price	Qtv / C	biect Unit	^
	wove up	1 SEAT-02	Sleeper Chaise (L)	,	KELLEX/N	SP3938-46 (L)	475.00	475 (	0 1 000	000 Fach	
		2 UDH 01	Uph (Soat 01 8 02)		KDAVET	27222 3	20.00	20 (	10 4 500		
Utilities	Move Down	2 0111-01	opin(ocur-oria oz)		TUVUET	LILLE - U	20.00	20.0	10 4.000		
									-		
Query	Remove								-		
Print									_		*
Close Project	Attach new or re	place selected com	ponent: Select produ	ict spec to use:		V New Qty/object	Lc	t Atta	ich	Replace	
Ciose Floject	1										
Quit	Project: DEMO-F	PM   Hastings Suite	es - Airport   Los Ange	les, California				Show report descr	íptions 🗌	Auto-add 🗹 Tip	)S

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&EZ Design / Pu	rchasing   Version 4.2.34									- 0	×	
	Project Object	List										
Views	Tag>	Description	Class	Primary Vndr	Primary Spec	Typ'l Use	Code	Budget	Cost	Total Price	^	
Mandana	PLANT-05	Plant (Bd. Rm)	FRN	DISTINCTIV	PLANT-05	BD ROOM		96.00	75.00	90.52	-	
Vendors	PLANT-06	Plant (Lobby)	FRN	DISTINCTIV	PLANT-06	LOBBY		96.00	75.00	90.52	-	
Librany	PLANT-07	Plant (Lobby)	FRN	LABS	PLANT-07	LOBBY		96.00	75.00	90.52	-	
Library	PLANT-08	PLANT (Exercise Room)	FRN	DISTINCTIV	PLANT-08	EXER RM		96.00	75.00	90.52	-	
Clients	POD-01	Lectern Podium	FRN	PETER PEPP	POD-01	CONF RMS	OSOI	390.00	300.00	362.10	-	
ononio	PT-01	Paint For Walls	FIN	BENMOORE	PT-01	C SU		0.00	0.00	0.00		
Projects	PT-03	Paint Between Crown & Trim	FIN	BENMOORE	PT-03	C SU		0.00	0.00	0.00		
	PT-06	Paint For Ceilings	FIN	BENMOORE	PT-06	C SU		0.00	0.00	0.00	_	
Areas	PT-07	Paint For Bath Ceilings	FIN	BENMOORE	PT-07	C SU		0.00	0.00	0.00	_	
Rooms	PT-08	Paint	FIN	TOABO-X	PT-08	C SU		0.00	0.00	0.00	_	
EE8E Wkeht	SEAT-01	Sleeper Chaise (R)	FRN	KELLEX-N	SEAT-01	C SU	OSOI	640.00	495.00	597.46	_	
TT OL WINSHI	SEAT-02	Sleeper Chaise (L)	FRN	KELLEX-N	SEAT-02	C SU	OSOI	640.00	447.50	599.14		
Objects	SEAT-03	Ergo Task Chair	FRN	SOUTHFIELD	SEAT-03	Q/Q SUITE	OSOI	350.00	319.00	385.03	_	
Specs	SEAT-04	Side Chair (@ Desk)	FRN	SOUTHFIELD	SEAT-04	Q/Q SUITE	OSOI	350.00	271.00	330.49	_	
	SEAT-05	Ottoman / Coffee Table	FRN	SOUTHFIELD	SEAT-05	K STE/DD	OSOI	240.00	188.00	226.91	_	
Orders	SEAT-05A	Ottoman / Coffee Table	FRN	SOUTHFIELD	SEAT-05A	Q/Q SUITE	OSOI	240.00	188.00	226.91	_	
	SEAT-06	Lounge Chair	FRN	SOUTHFIELD	SEAT-06	Q/Q SUITE	OSOI	350.00	271.00	330.49	-	
	SEAT-07	Ottoman	FRN	SOUTHFIELD	SEAT-07	Q/Q EXT	OSOI	240.00	186.00	227.89	- 1	
Orders	SEAT-08	Luggage Bench	FRN	JIB	SEAT-08	Q/Q LARGE	OSOI	320.00	248.00	299.33	_	
E	SEAT-09	Sleeper Chair	FRN	KELLEX-N	SEAT-09	KING		350.00	271.00	330.49	_	
Expediting	SEAT-09A	Window Seat Cushion	FRN	CDS INC	SEAT-09A	Q/Q SUITE		51.00	40.00	48.28	_	
Invoices	SEAT-10	Executive (Board Room)	FRN	SOUTHFIELD	SEAT-10	BD ROOM	OSOI	570.00	446.00	538.32		
Check Req's	Eind:	using this order: Tag	FRN	Search in: De	scription	for chais	1080I I e	Find	Next Eind a		A	
										21		
Commands	Tag:	SEAT-34 Class: FRN	V Co	de:	N	lotes:					^	
<u>S</u> ave	Description:	Loveseat @ Convention Corridor										
Cancel		✓ Use component #1 "Type/Product" in the way	orksheet and	reports.								
Import	Unit of measure:	Each										
import	Budgot	1250.00										
	Budget.	1230.00									~	
	Primary Compo	nent (Product Specification)		0	ptional: Second	dary Compon	ent (Produc	ct Specificatio	n)			
	● Create a " <u>p</u> lace	eholder" spec with this Spec ID: SEAT-34		0	No secondary (	component is r	needed.	ID: COM-45				
	Description:	Love seat @ Convention Corridor	Use protot	ype		uder spec Wi	in uns opec	D. 0001-43				
	Vendor:	TBD V New	from librar	ry .	Description: Fa	bric @ Loveseat				Use prototype	÷	
	Unit of measure	e: Each	in material / F	Inish	Vendor: TB	D	✓ New Unit	of measure:		Mat'l / Finish		
	Unit of med Sure			0	Attach existing	spec as a sec	ondary com	ponent:	~ N	lew		
	O Attach existing spec as the primary component.											
Close Project	Primary component quantity is assumed to be 1. To change, edit object's component list later.											
Quit	Project: DEMO-F	PROF   Hastings Suites - Downtown   Los A	Angeles, Cali	fornia				Show repor	t descriptions	] Auto-add 🗹 Tir	ps	
	-											

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



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** buttona 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 datestamped 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

👖 FF&EZ Design / P	urchasing   Version 4.2.	34																	-	
	Project Spe	cificatio	n List																	
Views	Spec ID>			Туре		Ve	endor	Ca	talog #	Code	Co	ost		Sell	Lead	DA	CA	Quote	Ship T	• •
Vondors	PT-01	Paint F	or Walls			BENMOOR	E					0.0	0	0.00	C	)			Project	
vendors	PT-03	Paint E	Between Cr	rown & Trim		BENMOOR	E					0.0	0	0.00	0	)			Project	
Library	PT-06	Paint F	or Ceilings	S		BENMOOR	E					0.0	0	0.00	C	)			Project	
,	PT-07	Paint F	or Bath Ce	eilings		BENMOOR	E				_	0.0	10	0.00	0	)			Project	
Clients	PT-08	Paint				TOABO-X						0.0	10	0.00	0	)			Project	
	SEAT-01	Sleepe	r Chaise (F	R)		KELLEX-N		SP3938-4	47 ZEN (R)	OSOI		475.0	10	573.32	8	3 1	×	×	Project	
Projects	SEAT-02	Sleepe	r Chaise (L	L)		KELLEX-N		SP3938-4	46 (L)	OSOI		427.5	0	575.00	8	×	×	×	Project	
Areas	SEAT-03	Ergo Ia	ask Chair			SOUTHFIE		928		0501	_	250.0	0	301.75	6	6		×	Project	
-	SEAT-04	Side C	hair (@ De	esk)		SOUTHFIE		612-1S		0501		250.0	0	301.75	10	, 			Project	
Rooms	SEAT-05	Ottoma	an / Coffee	Table		SOUTHFIE		025-X		0501		165.0		199.15	10				Project	
FF&E Wksht	SEAT-05A	Uttoma	Choir	Table		SOUTHFIE		217.1		0501		250.0		201 75	10	<u></u>			Project	
Objecto	SEAT 07	Ottomo				SOUTHEIE		217.0		0501		165.0		100.15	0	<u></u>			Project	
Objects	Find: cost					Co.		Caraak	:						Find	M	out i	Find		
Specs	Find. Seal		using thi	is order.	pec ID	~ 00		Search	III.		IOF.				Fillig	IN	ext	i-inu a		1 ^
Orders																			Last sav	e: 04/06/21
	<u>G</u> eneral						Submitt	al Irac <u>k</u>	ing Si	tatus	As Of					S	tatus		As Of	
	Spec ID:	SEAT-01			🗆 Ima	ge only	Cutting for	Approval	0-Not reg	uired 🗸	11	1	CAD		0-1	Jot red	nuired	~	11	1
Orders	Type/Product:	Sleeper (	Chaise (F	R)			Shop Draw	ina	0-Not requ	uired			Prototyr	10		lot rec	nuired			
Expediting	Unit of meas:	EA		Code:	OSOI		Finish Sam	nle	1-Require	d/Pending	04/06/21		Hardwar	e Samples	5-4		od		04/06/2	
Invoices	Cnool Hom #							ipic	Trivequire	an chang -	04/00/21	~~	Tarawa		57	(ppior	Cu .		04/00/2	~
Check Req's	opec mem #.				Material/I	-inish spec	Strike-off		0-Not requ	ured 🗸		<i>×</i>	COM Re	equirement	1-0	lot red	quired	~		
	Size:	76"w 39"o	d 35"h				Cut Sheet		0-Not requ	uired 🗸	11	×.			1-0	lot red	quired	~	11	×
Commands	Weight:			Re	epeat		Flooded Flo	oor Plan	0-Not requ	uired 🗸	11	×.			0-1	lot red	quired	~	11	×.
<u>S</u> ave	Color:			]			Submittal N	Votes: 🗶	s Jim, 04/0	6/21: Vendor	promised fini	sh samp	ole by mi	d-month.						^
Save as	Mat//Fin <sup>-</sup>					-														
Revised	Mater III.						Reset St	tatus												
	Other Descr:	Zen Sleep	per Chai	ise #SP39	38-47 Ze	n (R); ^	Clear A	All												~
Revert		Arm on R	light whe	en facing s	sleeper c	haise;	-Spec St	atus												
Import		Zen Mattr	ess 8 1/	2" pillowta	p: Mech	& Matt 75"	Design a	approved	1: 02/23/19	)	Revision	Group	Date:	A			02/2:	3/19		
Template		long; pati	ented z-	coil fold o	ver techn	ology; Full	Client	annroved	1. 03/01/19	2	:	Status	notes:							^
Teurheureur		size matti Seat Ht	ress; 19" <sup>.</sup> Arm	Ht 35"			Vondor	Ouoto +	+ E22422		ato: 02/15/	10								
		Note: Qua	antity of	COM yar	dage req'	d to be	Vendor		F. EZ34Z34	+	ate. 02/13/	19	.							
	determined by fabricator; Expires after: 60 days Lead time: 8 wks																			
	nurchesing agent has unon Architectural Submittals																			
		Plan Lay	out;	buse upo	in / a critic	oturui	Total su	bmittals i	required:	2										
		Foam to I	Meet or I	Exceed C	A117 <sup>.</sup>	~	Total sub	mittals a	pproved.	1										~
Close Project	Sidemark:	✓ Auto	Project	ID / Objec	ct or Spe	D			pprotou.			VVe	ed link:							
Quit	Project: DEM	O-PROF	Hastin	gs Suites	- Downte	own   Los Ar	igeles, Cal	ifornia			Show S	Su <u>b</u> mitta	ls 🗹 Sho	w Spec Sta	tus 🗌	Equip	oment	fields [	Auto-add	I 🗹 Tips
				-								_					_			

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.

cleat ran			🗆 Include le ge au ren erte
elect Teb	DFC:		include legacy reports
inish Sche	edule by Type (Tag Group)		
llustration \$	Sheet by Area		
llustration a	Sheet by Area, Room		
lustration S	Sheet by Tag		
ead Time	/ Spend Analysis by Object (us	ed in worksheet)	
ead Time	/ Spend Analysis by Spec (use	ed in worksheet)	
	1		Search: Cle
General C	ptions Report Options		,
	1 1		
Title:	Illustration Sheet by Tag		
0.100	, , ,		
Subtitle:			Auto
Type:	Base report		
Filtor		Pages	Design revision date:
	a a vida	C All	© Do not print
· All IS	corus	(* All	to not print
C Reco	rds in the current query	C Page range:	<ul> <li>Use project date</li> </ul>
⊂ All m	arked records	From: 1	C Manual: 04/09/21
C Curr	ant _	To: 0000	I
, C <u>u</u> m	Room		
ACC	DBLQ		Update project screen
		Copies to print: 1	•
Printer	BROTHER HL-5250DN		
r miler.	DROTHER RE-0200DIV		
		Delete saved or	tions Save Report Optione
		Delete saved op	Save Report Options

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.

🛿 Report Setup - FF&E Reports	×
Select report:	□ Include legacy reports
Finish Schedule by Type (Tag Group) Illustration Sheet by Area Illustration Sheet by Area, Room Illustration Sheet by Class, Tag Illustration Sheet by Tag Lead Time / Spend Analysis by Object (used in worksh Lead Time / Spend Analysis by Spec (used in worksh	eet) eet) v
General Options Report Options	Search: Clear
Use this base sheet layout: 1-Images at tc -	Vendor information detail to print for primary component: 5-Name/Catal
For layout type 1, add additional description information to component images?	If printing secondary components, vendor f-Name/Catalc
Level of component specification detail to print: 1-Full detail fo	F If printing vendor, include Vendor ID?
Total object quantity and price information 1-Total quantit -	If printing vendors, also show supplier vendors that have been selected?
Location and location quantity information 1-Location and	Add Bill to/Ship to addresses? (Format does NOT consolidate ordering quantities across objects.)
If printing location information, position within report layout:	Submittal information to print: 1-Always print
Use single column for description detail instead of two (better with long (multi-page) descriptions)?	If showing locations, show corresponding PO #? (component 1 only)
If showing detail, show quantity needed for each component?	Print page numbers? (Not recommended for large projects—use "Tag" as index)
Show price for each component?	Include revision date and/or code if found on a specification?
	Delete saved options Save Report Options
Printer Properties Preview	Print >PDF Display PDF? 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<sup>Z</sup> Screens** Design/Purchasing

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

#### Ordering FF&E (1)

Design version w/optional export plug-in Design/Purchasing version

In the pure *Design* version of FF&EZ, you can produce the "Ordering Worksheet" report, which breaks down the project FF&E requirements by vendor and prints what are in essence unnumbered purchase orders in report format.

In the *Design/Purchasing* version or the *Design* version with the optional *Orders Export* plug-in, an **Order...** button appears in the "Commands" section on the FF&E Worksheet (see image at right).

The **Order...** command allows you to convert finalized FF&E specifications to purchase orders. In the *Design/ Purchasing* version, the orders will be assigned order numbers and added to the Orders Screen. The descriptions for each specification are augmented with a breakdown of how the product is being used (that is, room locations for primary products like chairs and object usage for secondary components.

When you click on the **Order...** button, the system allows you to specify a scope that changes the number of objects being ordered, based on the object, the vendor and/or location. There are options that control some of the additional text that is added to the order items, as well as the level of detail included.

In the image above, the objects from a single vendor have been selected across the entire project. FF&EZ shows the items in the scope, where

	FF&E Work	sheet										Query Ac	tive	Show All
Views	Area ID	Phs	Class	Room ID	Finish Locn	Object		Description		Primary Vndr>	Primary Spec	Qty / Room	Unit	P.O. #
Vondore	Guest Rooms	1	FRN	KING		SEAT-03	Ergo Task Cl	hair		SOUTHFIELD	SEAT-03	1.00	Each	
venuors	Guest Rooms	1	FRN	KING ADA		SEAT-03	Ergo Task Cl	hair		SOUTHFIELD	SEAT-03	1.00	Each	
Library	Guest Rooms	1	FRN	KING SOFA		SEAT-03	Ergo Task Cl	nair		SOUTHFIELD	SEAT-03	1.00	Each	
	Guest Rooms	1	_ 🗾 🛛	Order Conversion Setu	р						<b>×</b>	1.00	Each	
Clients	Guest Rooms	1	-	Scope of order	list <sup>.</sup>							1.00	Each	
	Guest Rooms	1	_	This object (	CEAT 10)	0	in room PD		Have your	un the "Setun C	'bk"	1.00	Each	
Projects	Guest Rooms	1	-		SEAI-10)	0.		ROOM (Only)	utility to se	arch for any		1.00	Each	
Areas	Guest Rooms	1	-	Vendor SOL	JTHFIELD's	objects O.	in this area	(any room).	unresolved	ormissing		1.00	Each	
	Guest Rooms	1	-	○ All objects		۰.	anywhere	in this project.	selections	or quantities?		2.00	Each	
Rooms	Guest Rooms	1	-		l objects in th		- (ronardloss	of location)				1.00	Each	
FF&E Wksht	Guest Rooms	1				1.00	Each							
Objects	Guest Rooms	1	H c	rdering scope w	1.00	Each								
Objecto	Guest Rooms	1	- P	reviously ordere	d objects are	IS.	1.00	Each						
Specs	Guest Rooms	1	Η								-	1.00	Each	
Orders	Guest Rooms	1										1.00	Each	
	Guest Rooms	1	-	c	Objects in order scope Display components to							1.00	Each	
	Guest Rooms	1				The curren	t scope will	create 5 orders				1.00	Each	
Ordore	Guest Rooms	1		-		The curren	it scope will	cicate o ordera.	10.01.0			1.00	Each	
Oldels	Guest Rooms	1		lag		Descrip	tion	Roo	om ID Qty/H	tm Tot Qty	^	1.00	Each	
Expediting	Guest Rooms	1		SEAT-04	Side Chair (@	) Desk)		Q/Q SUI	TE	1	8	1.00	Each	
Invoices	Guest Rooms	1	5	EAT-05	Ottoman / Col	ffee Table		C SU		1	17	1.00	Each	
invoices	Guest Rooms	1	5	EAT-05	Ottoman / Col	ffee Table		K STE		1	9	1.00	Each	
Check Req's	Guest Rooms	1	5	EAT-05	Ottoman / Col	ffee Table		K STE A	DAS	1	1	1.00	Each	
	Guest Rooms	1	_ 5	EAT-05	Ottoman / Cot	ffee Table		K STE/D	D	1	9	1.00	Each	
ommands	Guest Rooms	1	_ 5	EAT-05A	Ottoman / Co	ffee Table		KING SC	)FA	1	9	1.00	Each	
6 -1 -1	Guest Rooms	1	- 5	EAT-05A	Ottoman / Cot	ffee Table		0/0 SUI	TE	1	8	1.00	Each	
<u>A</u> dd	Guest Rooms	1			Lauraa Chair	liee Table				-		1.00	Each	
Edit	Guest Rooms	1	_		Lounge Chair					1	÷ –	1.00	Each	
	Guest Rooms	1		EAT-06	Lounge Chair			Q/Q ADA	1	1	5	1.00	Each	
<u>R</u> eplace	Commercial	1		SEAT-06	Lounge Chair			Q/Q LAR	GE	1	9	12.00	Each	
Class	Find: south		5	SEAT-06	Lounge Chair			Q/Q SUI	TE	1	8 ind	Next F	Find all	A A
			= 5	EAT-07	Ottoman			Q/Q EXT		1	8			
Delete			S	EAT-10	Executive (Bo	oard Room)		BD ROO	M	12	12			ast save: 11/12
	FF&E Summ	arv			1									
				Combine produ	cts from sam	e vendor or su	pplier into sir	igle order.	⊠ Show	locations or usa	age			
Order	Project: Split different object usages of the same product into separate items Include room name													
	Area:	Comme	rd 🗆	List socondary	components t	that are ordere	d congratoly							
	Room	Board F		List secondary	components	linal are ordere	u separately							
<u>U</u> tilities	Object	Executiv	្រុល	rder item detail	: O Full deta	ail	Stack	fields		01	dor			
0	Spoc(c):	One	1		Medium	n description				<u></u>	uei	2		
Query	Spec(s).	Spec	Ч 🗸	Show tips	○ Short de	escription			Ordering Worksheet	t Ca	ncel			_
Print		3EA1-10		ener upe										2
<u>_</u>		UPH-10		Inholstony (Board Pr	n Chaire)					- 23.00	27.76	/		2
		A 100 TO 100 TO 100		CONTRACTOR OF A CONTRACT OF A	u sololiai			EATHER FOOR( 1.0)		20.00	61.10 14			-

they are located and lets you confirm the quantity per room if needed. It shows an extended quantity based on the room counts you entered on the Room screen.

The Order Conversion Setup screen also includes a secondary access to the "Ordering Worksheet Report," which is normally accessed with the main **Print** button. This version of the report is automatically set to use the scope you select, so you can easily create documentation of which products were ordered each time you run the Order procedure.

The Orders Export plug-in is an optional module that builds a dataset representing product ordering data,

then exports it in a variety of standardized formats, including flat and relational structures. It also includes a "hook" for developing custom formats (essentially a plug-in for the plug-in) to create specially formatted or pre-processed data sets for the specific requirements of individual clients.

## Ordering FF&E (2)

Design version w/optional export plug-in Design/Purchasing version

Since FF&EZ allows you attach multiple products to one object, the scope that you select when you are setting up orders also selects all the related products that need to be ordered.

Clicking on the **Components to Order** button will display the "disassembled" objects and their total quantities. This display also notes items that have been set to ship directly to the project site, or which have alternate shipping destinations, so a quick check can be made. Setting the shipping destination is important, since FF&EZ breaks out order items based on the source *and* the shipping address.

In the example shown, the large list of objects listed in the previous page's image have been condensed to the actual products that are needed, along with the extended quantities. Note that each fabric product has been set to ship to the upholstery vendor, not the project site.

FF&EZ Design / P	urchasing   Version 4	4.2.34										- u				
	FF&E Wor	rksheet	t								Query Active	Show	All			
Views	Area ID	Phs	Class	Room ID	Finish Locn	Object	Descripti	on	Primary Vndr>	Primary Spec	Qty / Room Unit	P.O. #	_ ^			
Vendors	Guest Rooms	1	FRN	KING		SEAT-03	Ergo Task Chair		SOUTHFIELD	SEAT-03	1.00 Each		-			
Vendoro	Guest Rooms	1	FRN	KING ADA		SEAT-03	Ergo Task Chair		SOUTHFIELD	SEAT-03	1.00 Each		-			
Library	Guest Rooms	1	FRN	KING SOFA		ISEAT-03	Ergo Task Chair		SOUTHFIELD	ISEAT-03	1.00 Each		-			
	Guest Rooms	1	L 27 ·	Order Conversion S	Setup					<b>—</b>	1.00 Each		-			
Clients	Guest Rooms	1	+	Scope of or	der list:						1.00 Each		-			
- · ·	Guest Rooms	1	+-		+ (SEAT 10)	0		Be sure to	check the "Shi	n To"	1.00 Each		-			
Projects	Guest Rooms	1	+-1		LI (OLAI-10)	0.		column to	ensure that iter	ns are	1.00 Each		-			
Areas	Guest Rooms	1	+1	Vendor S	SOUTHFIELD's	objects O.	in this area (any room).	beina ship	ped to the corr	ect	1.00 Each		-			
Deserve	Guest Rooms	1	+-	<ul> <li>All objects</li> </ul>	5		anywhere in this project	location. N	Aake correction	s on	2.00 Lach		-			
Rooms	Guest Rooms	1	+-		ared objects in th	a current quen	(regardless of location)	the Specif	fication screen.		1.00 Each					
FF&E Wksht	Guest Rooms	1			ered objects in t	le current query	(regardless of location)				1.00 Each					
Objects	Guest Rooms	1	H	Ordering scope	e will automatica		1.00 Each		<u>_</u>							
Objecta	Guest Rooms	1	+ F	Previously ord	ered objects are	e excluded. A s	eparate order will be create	d for each unique	shipping addre	SS.	1.00 Each					
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invoices	Guest Rooms	1	T ī	HUNTER DOU	UPH-10	Upholstery (Bo	ard Rm Chairs)	12.00	Yd SOUTHF	IELD	1.00 Each		<b>-</b>			
Check Req's	Guest Rooms	1		SCOTT	UPH-05	Upholstery (Se	at-05/05A/08)	53.00	rd SOUTHE	IFLD	1.00 Each		- I			
	Guest Rooms	1		SOUTHEIELD	SEAT-03	Ergo Task Cha	air	158.00 6	-Δ Site		1.00 Each		-			
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<u>A</u> dd	Guest Rooms	1	-	SOUTHFIELD	SEAT-05	Ottoman / Con	ee lable	36.00 t	EA Site	L	1.00 Each					
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Euit	Guest Rooms	1	-	SOUTHFIELD	SEAT-06	Lounge Chair		23.00 E	EA Site		1.00 Each					
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<u>C</u> lone	Linu. south		_	VALLEY FGE	UPH-10A	Upholstery (Bo	ard Rm Chairs)	12.00	rd SOUTHF	IELD	INEXL I-IIIU dii	A	•			
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							,				-		· · ·			

#### **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").

FF&EZ Design / Pu	urchasing   Ve	ersion 4.2.34												-		×			
	Order	List																	
Views	✓ Hold	<po #<="" th=""><th></th><th>Client ID</th><th>Project ID</th><th>CInt Ref</th><th>Status</th><th>Date</th><th>Vendor ID</th><th>Cost</th><th>:</th><th>Sell</th><th>Deposit Out</th><th>Ship</th><th>То</th><th>^</th></po>		Client ID	Project ID	CInt Ref	Status	Date	Vendor ID	Cost	:	Sell	Deposit Out	Ship	То	^			
Vendors		562	SMITH	ICO	DEMO-PM		ISSUED	02/28/20	IMC	61,1	135.00	61,135.00	33,242.23	PROJECT					
Vendors		561	SMITH	100	DEMO-PM		ISSUED	01/26/21	IMC	1	150.00	150.00	0.00	PROJECT		_			
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Specs	PC	)# <sup>-</sup> 562		Rev	rised <sup>-</sup> 09/09/20				□ Hold	Closed	Status note	s.			Add not	le			
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	Sold by: Bissel, Jon New Edit Imc Framed Art And Mirrors																		
Orders	Project:         DEMO-PM         Hastings Suites - Airport         Billing type: O Invoice us (resale)         Terms:														~				
Expe <u>d</u> iting	Client: SMITHCO V The John Smith Companies O Invoice client directly (incl. internal clients) Automatic revision tracking:																		
Invoices	Client Bef (22/25/21) Jim: Shipping schedule revised as													^					
Check Reg's	Tax quote: 4,349.45 Freight quote: 1,250.00 "Deliver by 03/05/21."																		
· ·	PO Tax	%: 0	0.000	Default	Purch %: 5% 🗆 Tax	?					[02/25/21]	Jim: Ship	ping schedule	revised a	s "."	~			
Commands	Order	te <u>m</u> s													Α	A			
	Add	Insert	#		Product/Type		Catalog #	Spec I	D Orig Q	ty Final	Qty ][ L	Init	Cost	Sell		^			
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<u>E</u> dit	Revise	e Item	2 /	Art (Frame	d Photo) @ Lounge	Chair	ROBINSON DE	VIL ART-03	5	0.00 50.00 ea			125.00	1	25.00	_			
Clone	Clone	Split	3 /	Art (Frame	d Photo) @ Luggag	je Bench	THE BELL TOV	VEFART-04	10	6.00 1	08.00 S Ea	l 🛛	125.00	1	25.00	_			
			4 /	Art (Guest I	Bath)		6989	ART-05		8.00	8.00 EA	۸	125.00	1	25.00	_			
Void	Delete	Repl	5 /	Art (Frame	d Photo) @ Boardr	oom	ROBINSON UN	IV (ART-10		1.00	1.00 Ea	۱ <u> </u>	125.00	1	25.00	×			
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Process	© Cilei		5 /// de	estination for	all items. Override as	O Ta and	lo shipping/pro	ject address a	liten	-Vendor Dep	osit Requi	rements -							
	Proje	ectadore	iss ne	eeded at right	:	O to ano	ner vendor.		~ New	Vndr Dep Inv	#: Proform		Chk Request	: N/A					
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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'1 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 reprinted, 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 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.

<mark>V/</mark> F	F&EZ Design / Pu	rchasing   Version 4	.2.34										- C		×
		Expediting	List												
	Views	Vendor>	Client	Project	PO/CO	ltm.Sp	t Spec ID	Description	Catalog #	Qty	Unit Cost	Shpg Date	Status	1	
	Vandara	AMANA	SMITHCO	DEMO-PM	556	1	EQP-081	Microwave-03	HDC212	2 Each	1,250.00		SHIPPED 02/21/21		
	vendors	AMANA	SMITHCO	DEMO-PM	556	1.1	EQP-081	Microwave-03	HDC212	1 Each	1,250.00		DELIVERED		
	Library	CORBETT	SMITHCO	DEMO-PROF	527	1	LIGHT-102	Ceiling Pendant (Board Room)	28-74	1	50.00		DELAYED 02/27/21	1	
	Library	IMC	SMITHCO	DEMO-PM	561	1	ART-11	Art (Framed Photo) @ Boardroom	LAUREL OAK I	1 Ea	125.00 S	SEE ITEM NO	SHIPPED 01/25/21		
	Clients	IMC	SMITHCO	DEMO-PM	561	2	FRAME-10	Frame	8692	1 Ea	25.00 S	SEE ITEM NO	SHIPPED 01/25/21		
		IMC	SMITHCO	DEMO-PM	562	1	ART-02	Art (Framed Photo) @ Sofa	ROBINSON PA	53 ea	125.00	04/15/21	WILL SHIP 04/12/21	1	
	Projects	IMC	SMITHCO	DEMO-PM	562	2	ART-03	Art (Framed Photo) @ Lounge Chair	ROBINSON DE	50 ea	125.00	04/15/21	WILL SHIP 04/12/21	1	
	0	IMC	SMITHCO	DEMO-PM	562	3	ART-04	Art (Framed Photo) @ Luggage Bench	THE BELL TOW	108 Ea	125.00	02/27/21	SHIPPED 02/23/21		
	Areas	IMC	SMITHCO	DEMO-PM	562	4	ART-05	Art (Guest Bath)	6989	8 EA	125.00	02/26/21	SHIPPED 02/25/21		
	Rooms	IMC	SMITHCO	DEMO-PM	562	5	ART-10	Art (Framed Photo) @ Boardroom	ROBINSON UNI	1 Ea	125.00	04/15/21	WILL SHIP 04/12/21	1	
l i	FERE Wikeht	IMC	SMITHCO	DEMO-PM	562	6	ART-12	Art (Framed Photo) @ Lobby	ROBINSON THO	1 Ea	125.00	04/15/21	WILL SHIP 04/12/21	1	
	HORE WINSHI	IMC	SMITHCO	DEMO-PM	562	7	ART-13	Art (Framed Photo) @ Lobby	HIPPODROME	1 Ea	125.00	04/15/21	WILL SHIP 04/12/21	1	
	Objects	IMC	SMITHCO	DEMO-PM	562	8	ART-15	Art (Framed Photo) @ Lobby	ROBINSON KAI	1 Ea	125.00	04/15/21	WILL SHIP 04/12/21	1	
	Specs	IMC	SMITHCO	DEMO-PM	562	9	ART-16	Art (Framed Photo) @ Lobby	ROBINSON UN	1 Ea	125.00	04/15/21	WILL SHIP 04/12/21	1	
	0.1	IMC	SMITHCO	DEMO-PM	562	10	ART-17	Art (Framed Photo) @ 1st FI Lobby Sofas	ROBINSON KAI	1 Ea	125.00	04/15/21	WILL SHIP 04/12/21	1	
	Or <u>d</u> ers	IMC	SMITHCO	DEMO-PM	562	11	ART-18	Art (Framed Photo) @ 1st FI Lobby Sofas	ROBINSON CH	1 Ea	125.00	04/15/21	WILL SHIP 04/12/21	1	
		IMC	SMITHCO	DEMO-PM	562	12	ART-19	Art (Framed Photo) @ 1st FI Elev Lobby	ROBINSON NO	1 Ea	125.00	04/15/21	WILL SHIP 04/12/21	1	
		IMC	SMITHCO	DEMO-PM	562	13	ART-20	Art @ Employee Lounge	AB52002	1 Ea	125.00	04/15/21	WILL SHIP 04/12/21	1	
	Or <u>d</u> ers	IMC	SMITHCO	DEMO-PM	562	14	ART-24	Art @ Women's RR 1st FI	STY03-M	1 Ea	125.00	04/15/21	WILL SHIP 04/12/21	1	
	Even all the s	IMC	SMITHCO	DEMO-PM	562	15	ART-25	Art @ Men's RR 1st FI	STY02-M	1 Ea	125.00	04/15/21	WILL SHIP 04/12/21	1	
	Expediting	g IMC SMITHCO DEMO-PM 562 16 ART-26 Ar		Art (Framed Photo) @ Library Shelf	1213/816A	1 Ea	125.00	04/15/21	WILL SHIP 04/12/21	1	1				
	Invoices	Eind:		using this order:	Vendor ID		∽ Go	Search in:	✓ for:		Find	d Next	Find all $\mathbf{A}$	Α	
	Check Req's														-
		Snipping						vendor		-	Financia	IS			٦
c	ommands	Item shippin	g note/date:					IMC Framed Art and Mirror	S		Vendor D	eposit:	33,242.23 requir	red	
		Vondor Ack	25422422								Balanco	roquost:	NI/A		
U	pdate Item	Venuor Ack.	204204204		nip. //			PO Notes Add ger	eral note Add	l item 1 note	Dalance	request.			
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		ompper.	NONE	< New	110 #.			_			Vendor i	nvoice #:	534		
Up	odate Order	Shipped on:	01/25/21	Qty S	Shipped:		1.00 Ea						04/05/04		
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١,	view Item	Container #:	11 1100								FF&E am	nount:	1:	25.00	)
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B	evise Item			se in a su		Adjust	client lee?				iax amou				
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	Query	<ul> <li>Standard</li> </ul>	note					<b>^</b>							,
	Print	<ul> <li>Custom no</li> </ul>	ote						applied.	00.20					
		O No note								58.84	Į.				
	Exit Form							The notes box applies to	all items in the or	der.					
	Quit												Brief layout	Tips	1
													-		- E

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.

## Processing

Design/Purchasing version only

The Processing Setup form, called with the **Process...** command (Orders screen or the Expediting screen), includes functions used to process the "milestones" of the purchasing workflow.

There are two types: those that create outgoing documents and those that process incoming documents. These functions are are broken across five distinct types of command groups. The processes that create documents all have an option to print directly to a PDF file instead of a printer.

The layout shown will change based on the type of processing, and each process type will display specific tools that can be used to easily accomplish the selected task.

The commands shown are in the rough order that they are used in processing orders (although there may be exceptions and some functions that are not used, depending on the project billing type).

#### Orders

This group allows you to preview, issue and re-print orders. Orders are officially "issued" when you use the **Print Final** or **>PDF** options and confirm this milestone.

The base order formats include options to add temporary notes to the header area as well as short and long boilerplate that prints on all orders. Custom formats are available.

ocessing Setup						
Process Type Orders	Scope of This	f orders	<b>to issue:</b> (562)		○ All orders for ve	ndor IMC
Issue <u>O</u> rders		ers for p ers for c	lient SMITHC	РМ О	<ul> <li>All orders in th</li> <li>All unissued ord</li> </ul>	e current query. lers
<u>R</u> e-print Orders	Ordering s	cope will a				
Vendor Deposits						
Issue Vendor	Orders to	proces	s (listed by v	endor)		Orders to process: 3
Deposit Requests	Vend	or ID	PO#	Client	Project	Cust Ref / PO ^
Enter Deposite to Vendere	IMC		534	SMITHCO	DEMO-PM	
Enter Deposits to vendors	IMC		540	SMITHCO	DEMO-PM	
Vendor Balances	IMC		561	SMITHCO	DEMO-PM	
Enter Vendor <u>F</u> inal Invoices						
Issue Vendor <u>B</u> alance Requests						
Enter Vendor Balance <u>P</u> ayments						
Client Invoices						v
Print Client Invoices	Comment:		1	1		Format:  Standard
Enter Client Invoice Payments						Custom
Project Closeout	Auth'd by: (Contact)	(None)		~ Add Edit	Date: 01/25/2021	Edit "Jerms & Conditions"
Olares Orderes	Revisions:	Print	notes 🖂 Prin	t flags 🖂 Print or	iginal quantities	Print: 🖂 Taxes 🖂 Freight
<u>C</u> iose Orders	Printer:	BROTH	ER HL-5250D	N		☑ Display PDF files?
Show tips	Pri <u>n</u> ter.		Properties	Preview	v/Draft <u>P</u> rint Fina	al >P <u>D</u> F Cancel

Here, the **Issue Orders** command has been selected, showing the options for selecting scope, the format and other options like special notes. You can also edit the permanent boilerplate for either "standard" formats.

#### **Vendor Deposits**

If you need to document the processing of deposit invoices from vendors and their payment, you can use these functions. Due to the simple nature of deposits, you can also do these tasks by editing the order. "Vendor Payment Status" reports let you track payment status information.

#### Vendor Balances

Used to reconcile vendor invoices against what the system expects them to invoice and to apply deposits to confirmed amounts. The **Enter Vendor Final** Invoices command is a crucial component in verifying that vendor invoices match what you expect to see. Balances owed appear on balance check requests, which create a "sent for payment" milestone.

#### **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.

rocess <u>T</u> ype	Vendor Invoid	e Information							
Orders	Single PO #:	AO4000005	100% D	eposit If the PO r	invoice applies to o number, otherwise on	ne PO, enter the ly select the			
Issue <u>O</u> rders	or vendor:	FABTEX	~	vena	lor. Double-click for o	current PO.			
Re-print Orders	Invoice #:		Invoice	date: / /					
	Amounts (US	D)From Invoice	Inv Ba	lance To	otal Selected	Remaining			
/endor Deposits	FF&E:	2,795.40		2,795.40	0.00	2,795.40			
Issue Vendor Deposit Requests	Freight:	65.00		65.00	0.00	65.00			
	Tax (0.00%):				0.00	0.00			
Enter Deposits to <u>V</u> endors	Deposit: =	2,860.40		2,860.40	0.00	2,860.40			
Vendor Balances	Balance:	0.00			0.00	0.00			
Enter Vendor	-Select order i	tems to which invo	ice applies:						
<u>Final Invoices</u>	Enter PO #:	AO4000000 Tax q	uote:	0.00	Deposit amt:	2,860.40			
Issue Vendor <u>B</u> alance Requests	. Uide weekin	Freig	ht quote:	65.00	Amt to apply:	2,860.40			
Entor Vandar		Description	equested ite		<u>D</u> elect all				
Balance Payments		Description		FF&EAM	Freight	lax			
Client Invoices	□ 2 DUA	L WINDOW SHADE	1.00						
	□ 3 MEA	SURING TRIP CHAP	1.00						
Print Client Invoices		L WINDOW SHADE	2.00						
Enter Client Invoice Payments									
Project Closeout									
<u>C</u> lose Orders	Create memo	Create memo for unapplied balance Mark open items as "shipped" as of invoice date.							
	Printer: BRO	THER HL-5250DN							
Show tips	Printer P	ropertie <u>s</u>	A	ccept 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, itemdriven 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.

🚪 FF&EZ Design / P	urchasing   Versio	n 4.2.30											-		×
	Request	List													
Views	Req ID>	Date	Туре	Client ID	Project ID	Vendor ID		Name		Req Net Total	Amt Recvd	Stat	Last Pmt	Exp	^
Vendors	52	01/26/21	Balance	SMITHCO	DEMO-PM	IMC	IMC Fra	med Art and Mirrors		88.27	0.00	14.11	11	N	-
	51	01/26/21	Doposit	SMITHCO	DEMO-PM	IMC	IMC Fra	med Art and Mirrors		0.00	0.00	Paid	01/06/01	N	-
Library	49	02/12/20	Deposit	SMITHCO	DEMO-PM	JITB	JOHNS	TON TOMBIGBEE FUE	RNITURE	111 792 50	0 00	Faiu	/ /	N	_
Clients	48	01/14/20	Balance	SMITHCO	DEMO-PM	AMANA	AMANA	SOUTHEAST		2,181.25	2,181.25	Paid	01/14/20	N	-
Olicitis	47	01/14/20	Deposit	SMITHCO	DEMO-PM	AMANA	AMANA	SOUTHEAST		2,131.25	2,131.25	Paid	01/14/20	Ν	
Projects													-	++	- 1
Areas														++	- 1
Rooms															-
FF&E Wksht	I													++	- 1
Objects													-	++	-
Specs														$\square$	_
Orders														+	- 1
														++	-
														$\square$	
Orders														++	-
Expediting			1	-		_							<u>+</u>	+	
Invoices	<u>F</u> ind:		using t	his order: Request	ID V G	0	Search in:		<ul> <li>✓ for:</li> </ul>		Find N	lext F	Find all	A 4	A
Check Req's	Request I	):	50	Notes:						^	ast Payment:	01/26/	/21		
Commands	Request D	ate: 01/2	26/21								Exported:	11	:: <b>AM</b>		
Add	Туре:	D								~ ·	/oided	11			
<u>N</u> ote	Request	Item Det	tail								1				
Clear	PO#	Item S	plit	Des	cription		Qty	Amount	Tax	Freight	Dep Applied		Net Total		^
Payment	561	All	Initial o	rder deposit			1.00	75.00	5	.78 7.50	88	3.28		88.28	
Void															-
2.070															-
															-
															- 1
Export	1														
0.000	Checks R	eceived				1						1			
Query	Chook #:	Crodit Cor	d Chook	data: 01/26/2	Entoro	d- 01/26/21	Donor	sit received:	00.00						
Print	OHECK #.		u check	uale. 01/20/2	Littere	u. 01/20/21	Debos	at received.	00.20						
Exit Form															
Quit														⊡ Ti	ρs

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).

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	Invoice	List																
Views	Inv #>	Date		Client ID	Name	Proj	ect ID		Title		Inv To	al	P	aid	Status	Last Pmt	Exp	^
Vendors	229	01/14/20	SN	AITHCO T	he John Smith Companies	DEMO-P	M	Hasti	ngs Suites - Airpo	rt town		187.50		0.00			N	
Library		00/25/10				DEMOT		Haoth	nga Ouitea - Dowi	ltown		,200.23		0.00				F
Clients																		ŧ.
Projects																		t I
Areas			_														+	+
Rooms																		t
FF&E Wksht																	_	<b>—</b>
Objects																	-	+
Specs																		E I
Orders																	-	+
																		É.
Orders																		t
Expediting																		- ~
Invoices	Eind:			using this orde	er: 🗸 🗸 Go		Search in:			<ul> <li>✓ for:</li> </ul>			F	ind N	Vext F	Find all	A	Α
Check Req's	s Invoice #: 227 Notes:											ntly se the						
Commands	Invoice	Date:	08/29	9/19								"Proce	essing" o	ption on th	ne Orders	screen.		
Add	Terms:											Expo	rted: (	8/29/19	11:09:2	4 PM		
Note											~	Voide	ed:	11				
Clone	Invoice	ltem D	etail															
	Order #	ltem	Split	Spec ID	Description		Qty		Amount	Ext. To	otal	Tax		Frei	ght	Total		^
void	526	1		CASE-20	Board Room Conference Table		1	1.00	1466	3,	149.00		0.00		0.00	3,1	49.00	
	528	1	-	LIGHT-102	Wall Sconce (Board & Conf Ro	oms)	1	1.00	1400		68 75		0.00		0.00		68 75	+
	020			2.511 101							00.10		5.00		0.00			
Export																		
	Payme	nts Ap	olied	1														
Print	Check #	#:		Check date	e: / / Entered: /	/		De	eposit applied:		0.00	Amou	unt app	lied:		0.00		
Exit Form																		
Quit																		īps