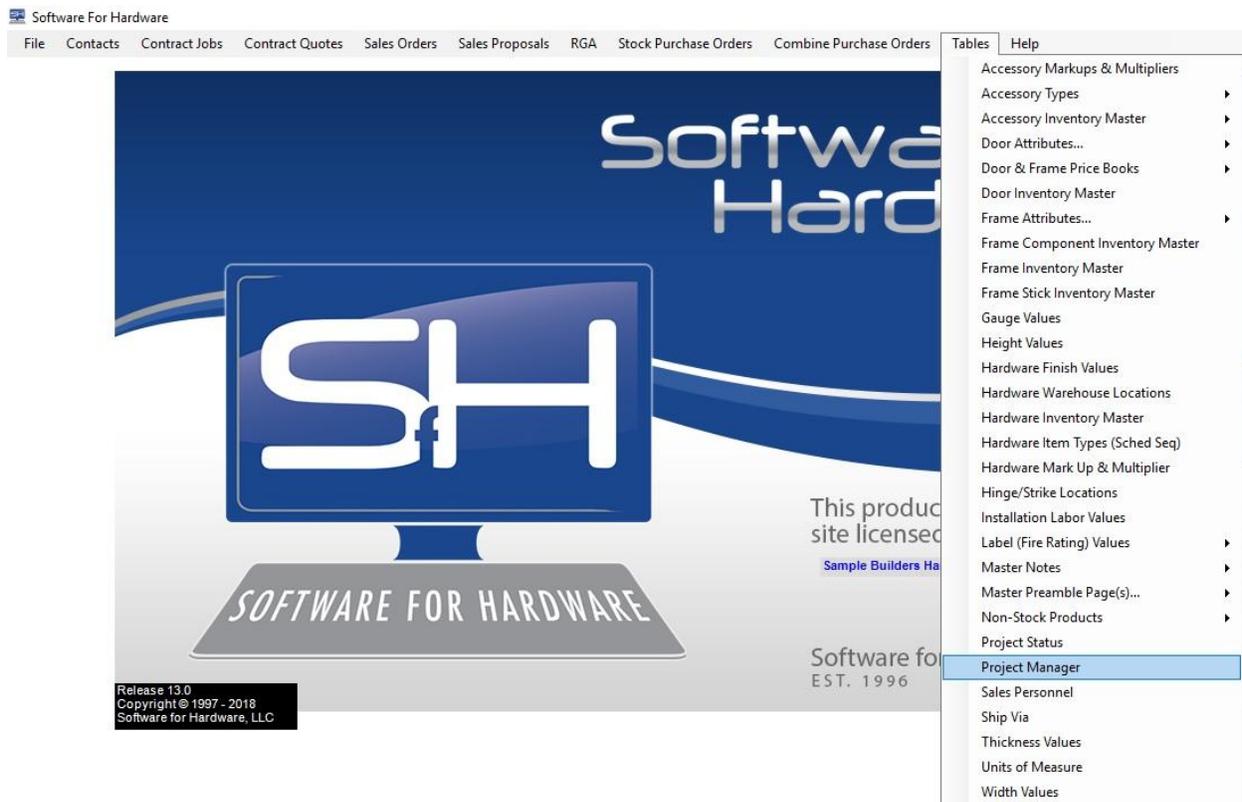


Assign a Project Manager

Software for Hardware, LLC's new enhancement allows you to add a Project Manager to a Contract Job, Sales Order or Sales Proposal. The Project Manager's name will now appear on the following Contract Job reports, all Fabrication reports, the cover pages of the Door/Frame Schedule, the Hardware Schedule and the Division 10 Schedule, as well as Contract Job Packing Slips and Change Orders. The Project Manager's name will on appear on Sales Order Packing Lists and Shop Lists. You can also assign a phone number and email address to each Project Manager.

How it works:

1. Add your Project Manager names into the database.
 - a. From the SFH Logo Screen click the *Tables* menu.



- a. Click on *Project Manager*.

The screenshot shows a window titled "Project Manager" with a menu bar containing "File". Below the menu is a table with three columns: "Project Manager", "Tel Number", and "Email". The table contains three rows of data:

Project Manager	Tel Number	Email
Bill Bevins	() -	
Bob Jones	() -	
David Smith	() -	

Below the table are three input sections:

- Enter a Project Manager:** A text box containing "Bob Jones".
- Enter Project Manager's Phone:** A text box containing "(555)555-5555".
- Enter Email Address:** A text box containing "bob@mysupplycompany.com".

At the bottom are three buttons: "Save", "Delete", and "Close".

- c. From this screen you can *Add* and/or *Delete* a Project Manager.
 - d. Enter the Project Manager's Name.
 - e. Phone and Email Address are optional.
 - f. Click *Save* when finished.
 - g. Click the *Close* button once you have created a list of Project Managers.
2. Add a Project Manager to a Contract Job.
 - a. Open a Contract Job.
 - b. The Project Screen appears now containing a *Project Manager Name* drop down.

The screenshot shows a "Contract Job" screen with a menu bar: "Change Orders", "Notes", "PAK Slips", "Pic Tics", "POs", "Preamble", "Pricing", "Provision", "Reports", "Search/Repl", "Job Info", "Metric".

Key fields include:

- Job Number:** 1
- Job Name:** Job 1
- Salesperson Name:** Bill Bevins
- Project Manager Name:** Bill Bevins, Bob Jones, David Smith
- Project Location:** Address #1: Second Floor, Address #2: Reception Area, City: Fort Myers, State: FL, Zip Code: 33901 USA.
- Architect:** Top Notch Architects
- Project Status:** On Going
- Contractors:** Blue Mountains Contractors and Builders

At the bottom is a table titled "Doors/Frames":

Door#	Leaf#	Arch. Set#	HW. Set#	Hand	Width	Height	Thickness	Door Material	Frame Material	Door Label	Qty.	Opening Type	Location 1	To/From	Location 2	Int. / Ext.	Product T
101		21	1	LH	3.0	7.0	1.34	CRS	CRS	TUH	1	Single	Corridor 1	To	Office 1	I	Door/Frame
102			1	LHR	3.0	7.0	1.34	CRS	CRS		1	Dutch	Corridor 2	From	Office 2	E	Door/Frame
103			2	RH	3.0	7.0	1.34	CRS	CRS		1	Single	Corridor 3	To	Office 3	E	Door/Frame
104			2	RH	3.0	7.0	1.34	CRS	CRS		1	Single	Corridor 4	To	Office 4	I	Door/Frame

- c. Select a Project Manager from the drop down list of names.
- d. Click the *Save* button to associate the selected Project Manager to this Contract Job.

3. Add a Project Manager to a Sales Order / Proposal.
 - a. From the SFH Logo Screen click the *Sales Order* menu.
 - b. Either add a new or open an existing Sales Order.
 - c. The Sales Order Screen appears now containing a *Project Manager Name* drop down.

The screenshot displays a web-based form for creating a sales order. The form is organized into several sections:

- Header Section:** Contains fields for Salesperson (John Doe), Ordered By (Tom Matthews), Customer PO (357778), Job Name (The Links), and Our Job# (TL-101).
- Date Required Section:** A field for Date Required (MM/DD/YYYY) with the value 04/15/2018.
- Project Manager Name Section:** A dropdown menu currently showing David Smith, with a list of other names (Bill Bevins, Bob Jones, David Smith) visible below it.
- Date Shipped Section:** A field for Date Shipped (MM/DD/YYYY) with a date picker icon.
- Received By Section:** A field for Received By.
- Ship Via Section:** A dropdown menu for Ship Via, currently set to Best Way.
- Payment Terms Section:** A field for Payment Terms.
- Print Options Section:** A panel with three checkboxes: Total Only, Sub Total with Total Only, and Elevations.

- d. Select a Project Manager from the drop down list of names.
 - e. Click the *Save* button to associate the selected Project Manager to this Sales Order.
4. The following reports will print the Project Manager's name, (if one is associated).

Note: The process of running reports is the same as it always has been.

 - a. Contract Jobs:
 - i. Division 10 Schedule
 - ii. Door/Frame Schedule
 - iii. Hardware Schedule
 - iv. Shop Work Order for Door Fabrication
 - v. Shop Work Order for Frame Fabrication

- vi. Shop Work Order for Prehung Fabrication
 - vii. Packing Slips
 - viii. Change Orders
- b. Sales Orders
 - i. Packing List
 - ii. Shop List