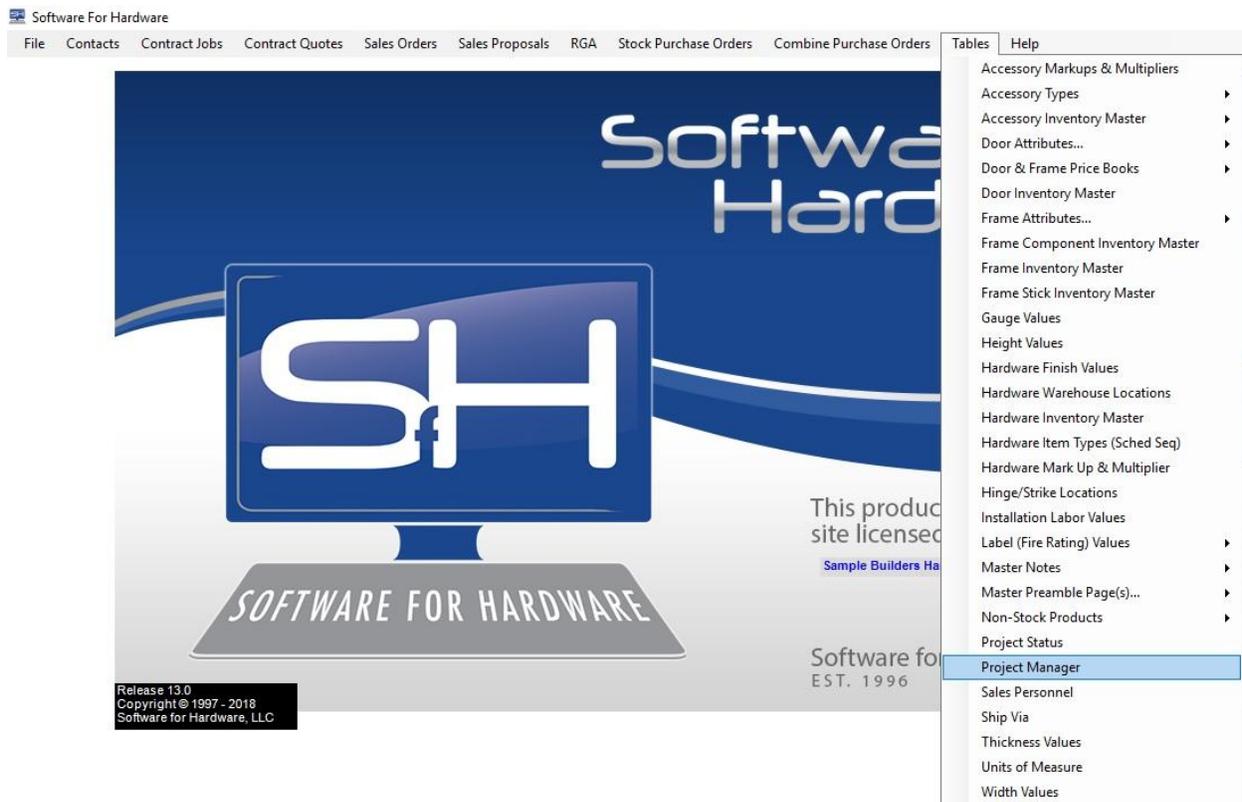# Assign a Project Manager

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.

   b. Click on *Project Manager*.

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.

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.

Salesperson	John Doe
Ordered By	Tom Matthews
Customer PO	357778
Job Name	The Links
Our Job#	TL-101

Project Manager Name

David Smith

Bill Bevins
Bob Jones
David Smith

Date Required (MM/DD/YYYY)

04/15/2018

Print Options

☐ Total Only

☐ Sub Total with Total Only

☐ Elevations

Date Shipped (MM/DD/YYYY)

__/__/____

Received By:

Ship Via

Best Way

Payment Terms

   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