



# Purchasing Door, Frame, and Hardware Distributor Software

## Factors to Consider

A BUYER'S GUIDE

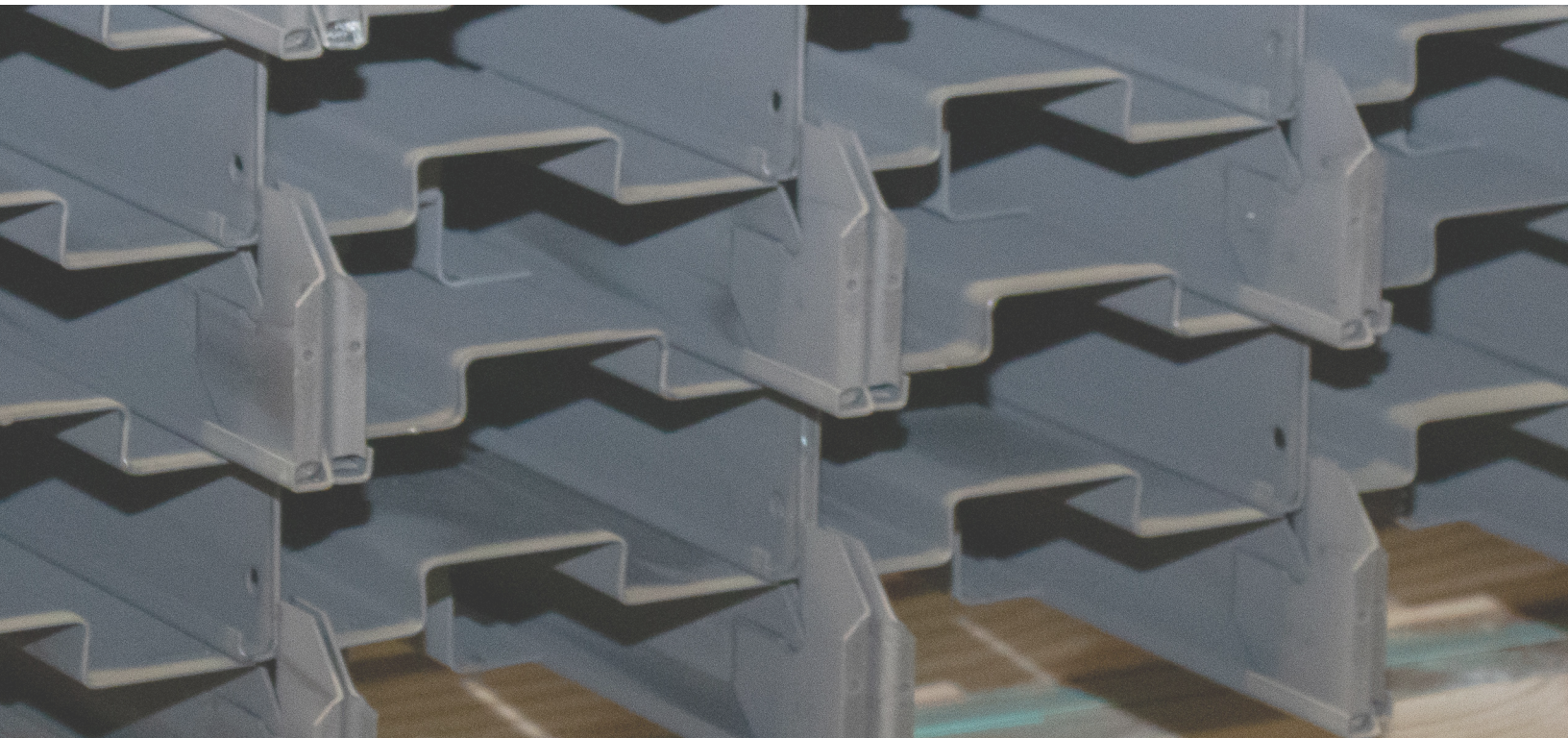
**Software**  
FOR HARDWARE

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## Introduction

Door, frame, and hardware distributors strive for the same goal: create loyal customers and operate a profitable and growing business. Creating loyal customers requires delivering your products and services as promised, professionally, on budget and on time. Creating a profitable business means running an efficient operation and regularly landing new jobs. Creating a growing business requires processes that can be scaled to support increased job activity and increased staff. **Future-minded door, frame, and hardware distributors invest in automation software** for all of these reasons.

Automation software enables door, frame, and hardware distributors to easily quote large jobs, manage projects, track inventory, and oversee financials. However, automation software requires a significant investment; hence, it is critically important to make the purchase that best fits your business.

This whitepaper will help you make the right software purchase decision and minimize your investment costs. The key factors to consider when evaluating software solutions fall into four main categories: Ease of Use, Functionality, Support, and Financial Impact. This paper examines each of these categories in detail to help you smartly evaluate your options and make the right decision to power your business for the future.

**“Simply going with software that’s considered industry standard can be a big mistake if it doesn’t fit company needs.”**

—Andrew Schrage, founder of Money Crashers



## 1 Ease of Use

Typically, door, frames, and hardware professionals are not super high-tech people. Job success depends on industry knowledge, people skills, and business skills. Hence, your first factor to consider in purchasing software should be ease of use.

Is the software logically organized, easy to learn, and easy to operate? Did the developers design the software with any prior door, frame, and hardware industry experience? Or, was the software created by a team of programmers with no understanding of the door business and your customers?

### **Demand a Detailed Demo**

Demand an in-depth demo of the real software with real job data. Most software companies sell their product by demo and only focus on the high points. Ask lots of questions about the software, and demand to see the features in action to see if they meet your expectations.

Do not hesitate to get the details, because exploring what the software has to offer on a deep level will help you decide if they're the right fit for your unique business.

**As ease of use declines, the rate of productivity greatly decreases.**

### **Automatic Updates**

Ease of use involves not just the day-to-day operating of the software but also the method for updating the software and the price catalogs. A few of the companies produce systems that auto-update overnight so you have the latest software and price book changes each morning.

### **Integrated Price Books**

To quickly and easily produce a bid, the software must contain the current list

prices of the products used in the job. These price books should also contain the desired cutsheets for each product. Integrated price books enormously increase your ease of use and enable you to quickly do a take-off on large and complex jobs.

Buyers often confuse ease of use with pretty screen design or gimmicky wizards.

### Optimized User Interface

The value of the software should lie in its intuitive screen design. If you cannot figure out how to navigate the program, you lose time and money. A user interface optimized to guide you smoothly through the software is essential for maintaining organization and productivity.

Ease of use means that the software works the way you do your job. To some degree, the software should provide you and your staff a methodology for running your business so that practices and procedures are followed in an organized and consistent manner. This enables you to scale your business for more employees, more customers, and more jobs.

**Ease of use enables you to scale your business for more employees, more customers, and more jobs.**

## 2 Functionality

Ease of use is critical, but you also need dozens of specific features and functions from your software platform. This white paper addresses nearly three dozen specific functions your software should deliver.

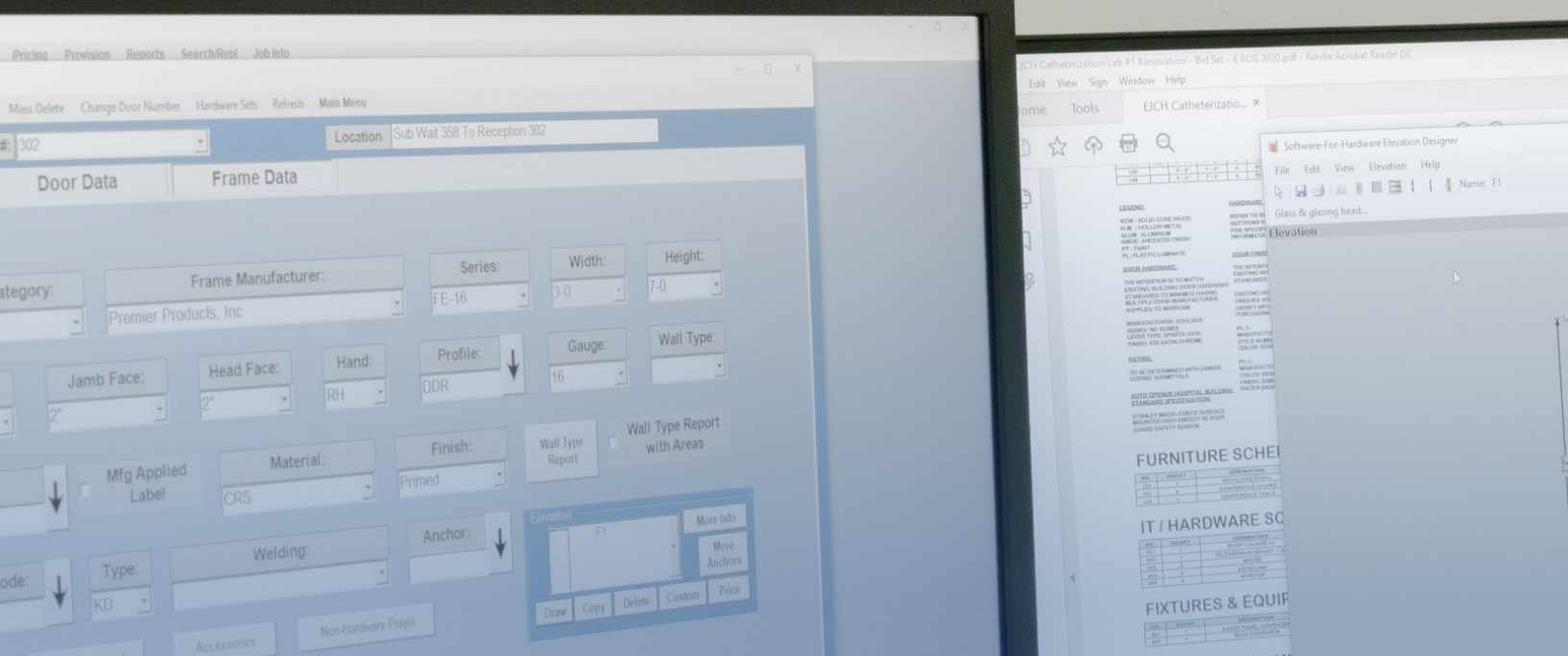
### Win and Manage Jobs

These specific features enable you to better respond to customers, prepare professional bids, and win more jobs.

1. **Contact Database** – Easily access all your customer and prospect contact information in one database. Architects, customers, manufacturers, wholesalers, installers, everyone you work with, buy

from, or sell to, all easily accessible. Don't waste money purchasing outside software.

2. **Integrated Price Books** – The software should automatically integrate and update the door, frame, hardware, and



accessory price books that you need.

3. **Manual Price Book Entry** – Your software should allow you to specify manufacturer and product information manually, if necessary.

4. **Request for Quote** – Any software package you choose must allow you to

**Your software can help you respond to customers effectively, prepare bids professionally, and win more jobs.**

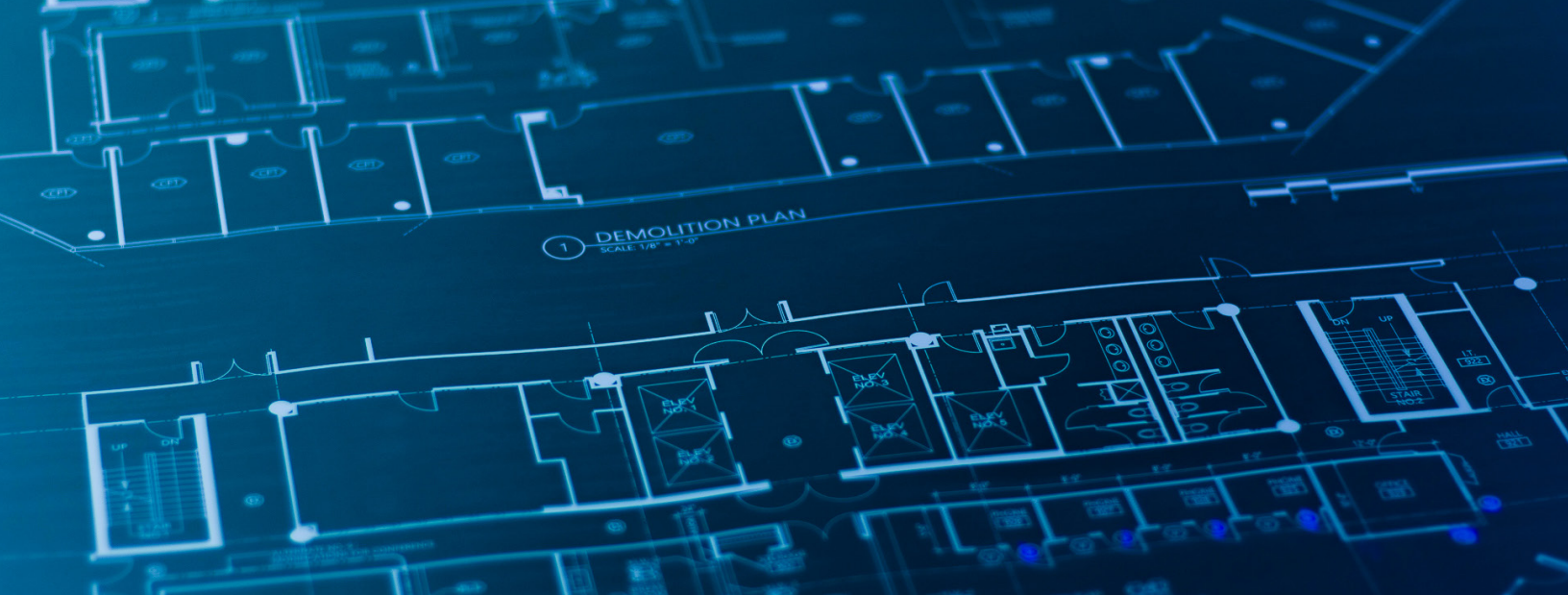
estimate a contract job. It should be able to quickly produce a Request for Quote which can be sent to your supplier(s) for a quoted price. These quotes should have like items grouped together with

associated quantities. In the case of doors, frames, and pre-hung units, this report would also identify all hardware preps and lite/louver kit cutouts required.

5. **Price Estimate Reports** – These are easy to generate, detailed price lists of all doors, frames, hardware items, and accessories used on a job. Door and Frame reports also show the cost of manufacturer preps and “our shop” preps when applicable. A detailed and easy to read report allows for a quick, accurate review before submittal.

6. **Submittal Bid Sheet** – Create summarized pricing for a job. Custom notes can be easily added. Quickly produce concise, professional bid sheets for your customers.

7. **Sales Orders/Proposals** – Some jobs may not require a submittal package. If so, your software should provide an easy to



use sales order process. Similar to adding items to an online shopping cart with one click, you can turn a Sales Proposal into a Sales Order. This process allows you to easily make over-the-counter sales without creating a contract job.

**8. Total Job Bid Report** – For contract job bids, you need software that produces a summarized report with subdivided categories (such as hollow metal doors and frames, wood doors, pre-hung units, finish hardware, division 10, or installation labor). The software should produce a report with an approval signature section and allow you to enter your own job qualifications and exclusions.

**9. Submittal Package/Shop Drawings** – A full submittal package typically includes a hardware schedule with cutsheets and a door/frame schedule with door/frame elevation drawings. If your job includes division 10 items, the software should produce a specific division 10 schedule. Also include your company logo on all customer reports.

**10. Job Areas** – By creating Areas, you can break a contract job down by building, floor, phase, or any other category that you may choose. Produce reports or Purchase Orders, Picking Tickets or Packing Slips only for a particular part of the job.

**11. Job Correspondence** – Software should track RFIs, Transmittals, and miscellaneous correspondence documents for every contract job so that you can respond quickly and professionally to customer inquiries.

**Equip your staff with the tools they need for high productivity.**

**12. Job Site Info** – Also related to responding quickly and professionally to customers, all job site information, including phone numbers, special delivery instructions, and directions, should be easily accessible.



## Increase Staff Productivity

These features enable you to increase the efficiency and scalability of your business.

**13. Database Power** – You need a system build upon the latest database technology for speed, power, and flexibility. Plus the ability to access and save data to the cloud.

**14. Inventory Control** – Inventory is not just an accounting function. Many benefits arise from having inventory control as part of your software automation platform. For example, when a customer calls for a specific product, there is no need to physically walk the warehouse. Rather, you

can immediately look it up in your software system. The best packages will track on-hand quantity, committed quantity, and on-order quantity. Another benefit: a master list of products enables you to add them to your jobs or sales orders.

**15. QR Code Integration** – Look for software that allows you to directly manage inventory via bar codes or QR codes. The software enables you to print adhesive QR Code or bar code labels for every product in your inventory. View item details and update inventory counts from any smart phone simply by scanning these codes. Instantly view product details and verify and update your inventory counts while in the warehouse.

**16. Inventory & Non-Stock Databases** – Automatically build a library of doors, frames, hardware and accessories as you add these products to a job or sales order. Save time when creating jobs and sales orders by reusing these items from the database.

**“Scalability is needed to fully exploit sustained periods of growth with minimal risk and disruption to the company.”**

—Gordon Daugherty, Managing Director of Capital Factory





17. **Division 10 Products** – If you are supplying bathroom accessories and toilet partitions, the software you choose must give you the ability to include these items in a job or sales order. In order to do this, you will need to be able to create room numbers and then associate the various accessories to a particular restroom.

18. **Installation** – More commonly today, door, frame, and hardware distributors also bid and provide the installation of the products they sell. Your software should allow you to define an install plan and specify labor hours.

A robust package also enables miscellaneous categories for installation-related expenses as well as assigning different labor rates and markups by job.

In addition, look for the ability to produce installer's reports which tell the installers exactly what to do and also give supervisors the ability to track progress.

19. **Adhesive Labeling of Products** – When you are preparing to ship products to your customer you will often need to label materials with tag numbers for product installation. Good software packages can create labels which include

full product descriptions and tag numbers for each product called for in the job.

20. **Shop Fabrication Reports** – If your company preps doors and frames in your own shop, then you need a software package that will produce shop work orders. These reports need to group together like items based on the attributes of the doors/frames, the preps involved, and the required fire labeling for these products. These reports should list the tag numbers that apply to each grouping of doors/frames and also tell the shop when these products are needed.

21. **Pre-hung Door Units** – For distributors doing high rise or assisted living centers, your software solution must support the use of pre-hung door units. Sophisticated software packages will even accommodate a pre-hangers hardware set in addition to the commercial hardware set for pre-hung openings.

22. **Areas** – When you need to break down a job by floor, phase, interior/exterior, etc. for pricing, ordering, or delivery purposes, the software you choose should support this feature for accessories, doors, frames and hardware.



**23 Archiving** – Once you complete a job or sales order, it is useful to move them from “work in progress” to an archive database. Robust packages will allow you to view/print archived jobs/orders and unarchive them if necessary.

**24. Picking Tickets & Packing Slips** – Easily generate picking tickets to pull stock material for both contract jobs and sales orders. Packing Slips can be created for all of the material being delivered to the job site. Adhesive labels can be printed to label all products going to the job site. Save time and reduce errors when managing jobs and sales orders.

**25. Schedule Creator** – Produce Door/Frame, Hardware, and Division 10 schedules. Preamble and note pages can be attached to each schedule and the Door/Frame Schedule should also include elevation drawings. Easily create and print complex schedules.

**26. Door, Frame and Pre-hung Fabrication Reports** – Create detailed reports that group all like doors, frames, or pre-hungs found in a contract job. Your software should produce reports that identify all required preps, fire labels, and accessories for the doors, frames and pre-hungs being delivered. Help your shop meet deadlines and track complex jobs.

**27. Change Orders** – Clients often request changes numerous times after the initial approval, so your software should produce and track change orders. Robust software packages can create purchase orders directly from change orders and support cutsheets and elevation drawings.

**28. Purchase Orders** – Instantly create purchase orders with one click from a Contract Job or Sales Order. Save time, reduce errors, and save costs. Easily track all your purchases.



## Increase Profitability

These features help identify areas that can improve the bottom line financials of your business.

29. **PO Status Monitor** – View all open POs on one screen with color-coded status to alert your staff of any potential issues before they become problems.

30. **“Combo” Purchase Orders** – Combine stock, job, or sales order POs into a single purchase order. Easily find the best POs to combine going to the same supplier to save money on freight charges, gain greater discounts, and meet minimum order quantities.

**“The average payback for investment in workflow automation software was 10.5 months with a 3-year ROI of 176%.”**

—“Total Impact of Workflow Automation Solutions”, Forrester Research, January 2015

31. **Archive Jobs and Sales Orders** – Clear out old jobs and sales orders by archiving them into a separate database. Keep your current database fast, organized, and clutter-free while still retaining access to past jobs/orders.

32. **Unbilled Purchase Order Report** – Create these reports to identify material that has been purchased but never billed to the client, thereby generating revenue.

33. **Sales Forecast Reporting** – Make sure your new software contains management reports to help you monitor sales and your current sales forecast.

34. **Profitability Reporting** – Critical to increasing profits is tracking it by job and by salesperson. Your software should provide quick access to the data you need to manage and grow your business.

35. **Quick Search** – You need the ability to search for any alpha or numeric screen across your databases.



### 3 Support

Purchasing business automation software is not a one and done event. In fact, by doing this you are entering into a long-term relationship with your software vendor. If the software suits your business needs and supports your business growth, then you may be using the software for decades. Hence, you need to carefully assess the software company and their ability to support your business for many, many years. Ask about these following key areas.

#### **Technical Support Response**

Can the company respond to your requests quickly? When you encounter a problem, while on deadline to submit your bid, will the vendor immediately answer the phone and help you? If your issue involves a “How do I?” question, you should receive same day help, ideally same hour or immediate. Some issues

may involve a software fix which could be quick or require days. Either way, your vendor should keep you informed as to the progress of the fix.

#### **Technical Support Capability**

Are the support staff native English speakers? Many firms outsource support to overseas firms. Ask the tenure of the



tech support staff and ask for satisfaction survey data. Strong tech support staffs should be able to resolve the vast majority of all inbound support requests quickly, same day. However, for stickier product issues, the company should provide direct access to Level 2 technical assistance.

## Training

Inquire about initial training and whether your training is included in the license fee. Many vendors charge thousands of dollars for training in addition to the license. Training can quickly get you and your staff up and running, and your best option is extensive, hands-on training. Good training will greatly benefit you and your staff in the long run. Live webinar training is a good option as it enables real-time interaction, letting you ask questions as you go through the software.

**Nearly all software vendors conduct customer satisfaction surveys. Ask your vendor if they will share those results with you.**

## Future Enhancements

Software continually evolves and improves with technology developments but more importantly with customer input. Ask the vendor how they incorporate customer feedback into product development. Many vendors only allow direct customer input from select large customers, if at all. Ask if they offer a user conference where you can receive training, give feedback, and socialize with others in the industry.



## 4 Financial Impact

Regardless of the great potential that software automation can provide your door, frame, and hardware business, one fact remains true— it costs money. You need confidence that this expenditure will produce real financial results.

### Return on Investment

The right software package should greatly increase productivity versus manual processes like Excel and Word. Automation software investment should enable your business to handle more complex jobs while reducing costly errors. Plus, the software should help you manage the myriad of changes most jobs involve, maximizing revenue and profit. Take the time to review your past jobs and determine the costs you incurred making errors or losing potential jobs.

### Job and Salesperson Profitability

Your software should allow you to determine job profitability at each point. Winning a bid often comes down to slim margins, so accuracy is critical. Also, your software package should be able to produce a salesperson profitability report for any time period you choose.

**Your software should allow you to determine job profitability at any point along the way.**

### Integrated Price Books

In order to quickly produce a bid, your software must contain list prices for each product being used in the job. You need to know that you are always using the most up-to-date pricing, because using outdated pricing could cause you to underbid a job.

### Accounting Systems Interface

While it may not be the most glamorous aspect of your software platform, the integration of your inventory, purchase orders, and invoices into an accounting system interface can dramatically improve efficiency and reduce invoicing and collection errors.





## Why spend the money?

The old adage, “If it ain’t broke, don’t fix it,” holds a lot of real truth. You operate a profitable door, frame, and hardware distributor business and all seems to be running just fine. So why purchase software? Why create new risks? You might think that the software won’t produce benefits, it will be hard to learn, or it will prove too costly.

Based on over 22 years of experience serving door, frame, and hardware distributors, we can help you dramatically reduce the risks and increase your odds of success. The three keys to leveraging software to grow your business are:

- 1. Purchasing software that addresses the functionality requirements outlined in this paper.**
- 2. Purchasing from a company that provides the best support and training in the industry.**
- 3. Purchasing the most value-priced software in the industry.**

Software for Hardware provides these three keys. As proof, in 22 years, only three of our clients have chosen a competitor’s software.

Implementing automation with Software for Hardware will help you:

- **Reduce errors and costs:** Minimize manual and human error that costs precious time, resources, and dollars.
- **Create Employee Success:** A Workflow Automation Platform helps employees succeed. The elimination of repetitive and manual processes motivates employees and allows them to focus on more important tasks which, in turn, boosts morale, enhances innovation, and creates loyal clients.
- **Improve Operations Visibility:** A Management visibility and real-time reporting improves with software-based workflow automation. Any employee can see another employee’s jobs, enabling easy coverage when a staffer is out sick.
- **Increase Profitability:** Old manual processes limit any business’s ability to scale. Workflow Automation opens up your ability to bid for bigger jobs and creates higher productivity to serve more customers with your existing staff.





**Software for Hardware works every day to help door, frame, and hardware distributors realize these benefits and put their businesses on the path to efficiency and profitable growth.**

Based in Atlanta, GA since 1996, Software for Hardware® provides software to commercial door, frame and hardware distributors across the U.S. and Canada. Nearly 1,000 door industry professionals rely on Software for Hardware® to improve their business productivity, client responsiveness, and bottom line profitability. As a result, Software for Hardware® has become the fastest growing software company in the industry and the software of choice for door distributors. Software for Hardware is proud to be a Univerus company.



Univerus believes that harmonious value results from bringing together forward-thinking professionals and proven solutions. Representing a suite of software businesses strategically woven into the Univerus family, its centralized management approach has empowered top-notch teams to provide mission-critical solutions with the most robust and innovative products available in the marketplace.

**softwareforhardware.com**  
**info@softwareforhardware.com**  
**770-945-2463**