

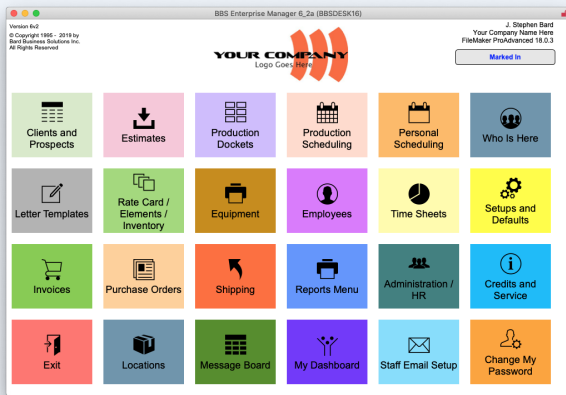
# Management Software

One Program to manage your entire company.



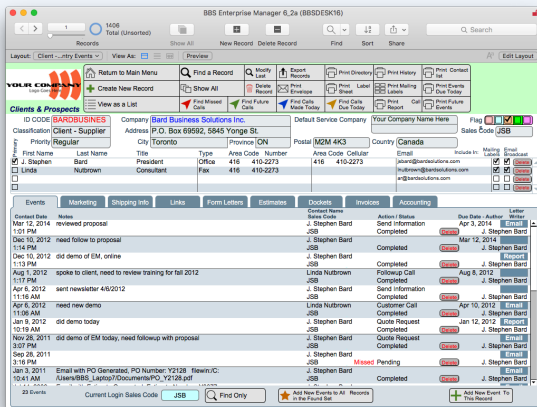
Enterprise Manager





## Clients & Prospects

- CRM for clients, prospects and suppliers
- company name and address, multiple contacts, phone numbers and email addresses
- record all correspondence, letter writer, marketing information, form letters, summary information linked to estimates, dockets and invoices



## Employees

- information regarding your staff
- their relative job functions, cost and billable hourly rates
- populates the menu lists in the Time Sheets

## Equipment & Resources

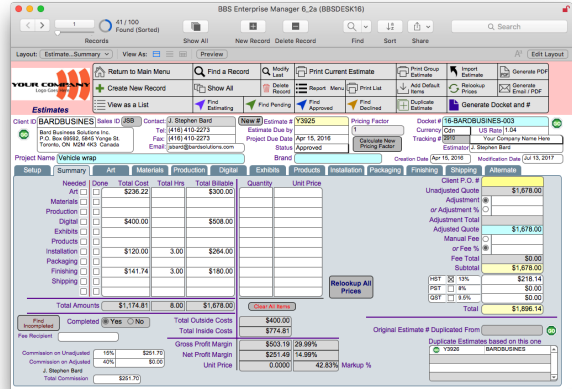
- information regarding all your equipment and resources
- cost and billable rates for each piece of equipment or resource
- bill by the hour or by a counter

## Rate Card & Elements

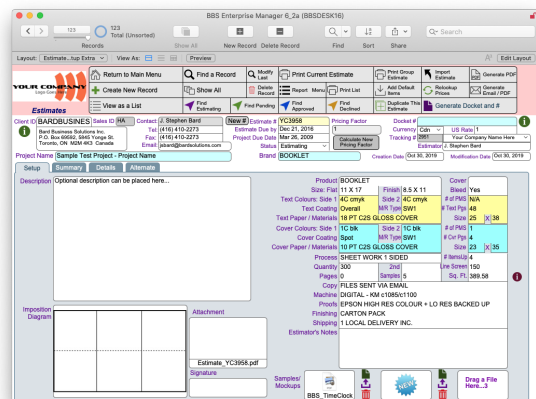
- support database for the estimating and costing databases
- ID Code, classification, category, size, description, auto enter default quantity, default cost, and markup
- each item will automatically determine the selling price
- fully functional inventory system

## Estimates

- track all your estimates for your clients
- setup section allows you to enter all the relative parameters and specifications for the estimate
- summary section shows the totals for each department
- prices are automatically entered for you based on the rate card table, with the ability to override
- an alternate format for estimates is available when you need to design your estimate on alternate specifications and totals



- additional adjustments and pricing factors can also be added
- gross and net profit margins are automatically calculated for you
- generate a pdf of an estimate, email to the client and log the event in one action
- once an estimate is approved, all the information is passed onto a docket with a single click of a button
- New: Two types of setups, Regular and Professional
- Regular allows for one set of specifications and simplifies the estimating process



- Professional allows for multiple specification charts and more complex estimates
- Easily upgrade from Regular to Professional as your business grows

## Dockets

- track and monitor all active jobs for your company
- all the key steps in a docket can be entered with their relative scheduled dates and check list, these items are attached to a calendar interface and gantt chart
- all costs including time sheets, equipment, purchase orders, expenses, materials / inventory and shipping are attached to their applicable docket
- a summary section compares estimated values to the actual costs as well as gross and net profit margins
- generate shipping labels for any destination

## Invoices

- generate and track billing information to your clients
- invoice numbers are automatically created
- invoices can be generated from dockets with all the relevant information and amounts automatically entered for you, based on estimates or actuals
- you can generate multiple invoices for each docket as needed
- payments, sales commissions, fees are all recorded
- aged receivables

## Purchase Orders

- generate and track all outside purchases
- PO numbers are automatically generated
- multiple items can be entered and linked to one or multiple dockets
- estimated items that are outside purchases to a supplier, a purchase order can automatically be generated and linked to the appropriate docket
- vendor invoices can be entered against the PO, as well as payment information
- aged payables
- past due & open purchase orders can be quickly found

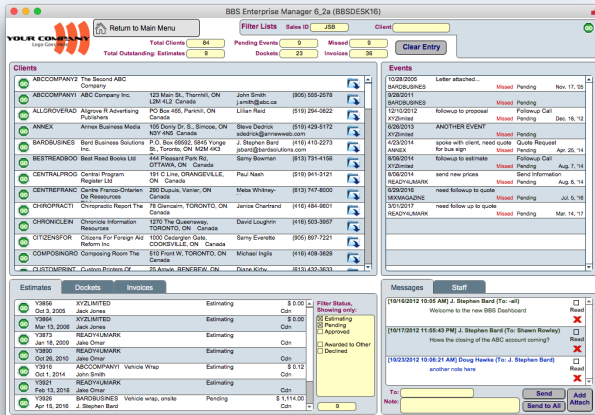
## Reports

- over eighty-five reports already setup for your use
- reports are generated from within each database section based on the current record or the current found set of records
- sales reports for estimates, dockets and invoice levels
- many reports allow you to select a start and end dates for a range of records
- includes aged receivable and aged payable reports
- some reports allow you to optionally select a single client code to filter the report printouts



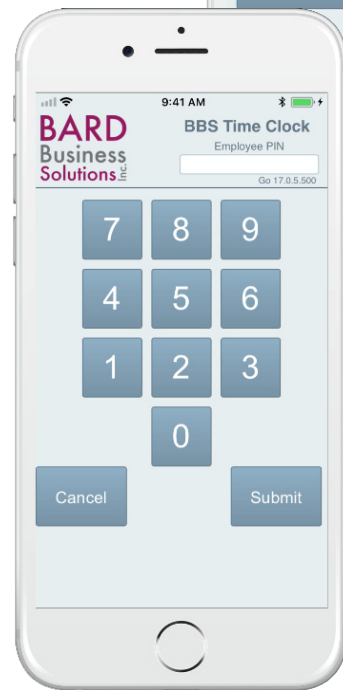
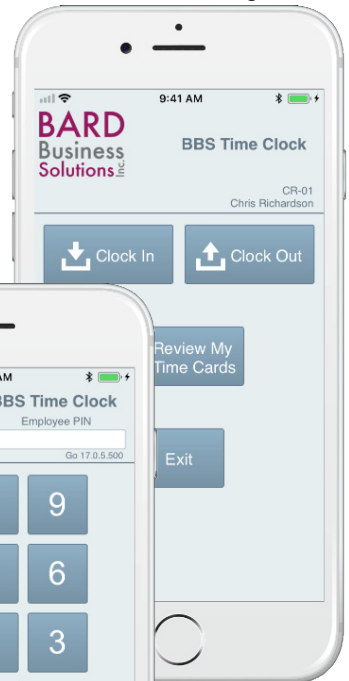
## Dashboard

- the Dashboard allows you view all your clients
- view and edit all your pending events
- auto filters for current estimates, dockets and invoices
- private message board to other staff and file transfer



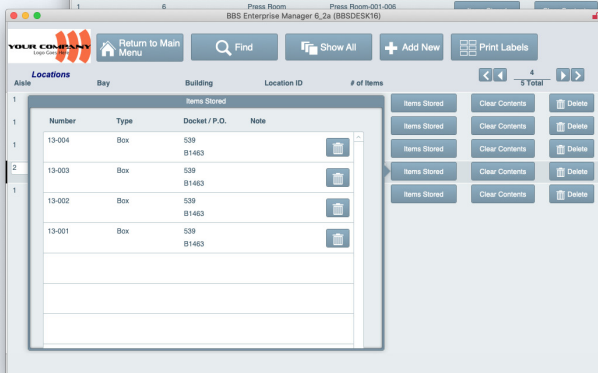
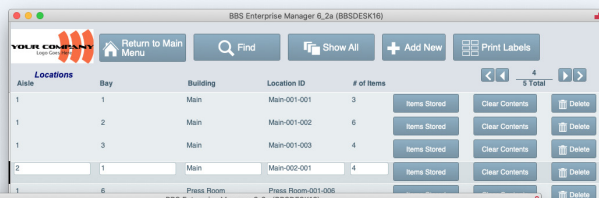
## Time Clock App

- Easy to Use
- Use any browser or FileMaker on any desktop, tablet or smart phone to clock-in and clock-out
- Track paid or unpaid breaks and lunches
- View your labour costs in real-time
- Can track GPS locations on some devices
- PIN Based Entry, you can define the number of digits required for quick clock-ins and clock-outs
- Manager Controlled Edits, staff can enter a note if they forgot to clock-in or clock-out and the manager can make corrections from their desktop or iPad
- Reports can be generated for a single employee or all employees for any date range



## Locations

- for tracking all inventory items both regular and special order items
- together with the included Remote Program, you can define, log in and out items by docket tracking or purchase order number
- allows for returning and leftover stock to it's original place or new location



Rates		Information		Dockets		Time Cards	
Start Date		Jan 13, 2019		to End Date		Jan 19, 2019	
Date		In		Out (hh:mm)		Total (dec.)	
Jan 17, 2019		9:02 AM		11:52 AM		2:50	
Jan 17, 2019		12:35 PM		4:05 PM		3:30	
Jan 18, 2019		9:01 AM		11:58 AM		2:57	
Jan 19, 2019		12:32 PM		4:10 PM		3:38	
Total						12.95	

**BARD**  
Business  
Solutions Inc.

**Time Card Report**  
Jan 13, 2019 to Jan 19, 2019

CR-01 Chris Richardson		Date	Time In	Time Out	hh:mm	Total	Note
		Jan 17, 2019	9:02 AM	11:52 AM	2:50	2.84	
		Jan 17, 2019	12:35 PM	4:05 PM	3:30	3.51	
		Jan 18, 2019	9:01 AM	11:58 AM	2:57	2.95	
		Jan 19, 2019	12:32 PM	4:10 PM	3:38	3.65	
		Total				12.95	

## Efficient Information Flow Is Important To The Success Of Your Business

We build customized Databases To Suit Your Business...

BARD BUSINESS SOLUTIONS INC. is a solution provider for all your customized database needs since 1995. -- Why? Because off-the-shelf software does not do business the way you do business.

### The BARD BUSINESS SOLUTIONS INC. Mission Statement

To provide solutions to companies and individuals who need the accurate processing of information using PC or Macintosh technology through the implementation of customized databases.

After all, information flow is instrumental in the success of most businesses today.

### Philosophy

Enter data once and use it many times. Error-prone paper processes are eliminated through seamless integrated connectivity.

One program is used to manage your entire company.

The Enterprise Manager allows you to enhance your client service and increases speed and accuracy from estimates to invoices.

Save time and resources as well as work smart and more efficiently.



### Platforms

The Enterprise Manager is developed in FileMaker® Pro and runs on the Windows, Mac OS, and the iPad OS platforms for a multi-user environment, and comes bundle with FileMaker® Pro.



### System Requirements

Please see our website for the latest version and system requirements.

**BARD**  
Business  
Solutions<sub>INC.</sub>

P.O. Box 106, Steeles Ave W  
Toronto, Ontario, Canada M3J 0H9  
Telephone: 416 410 BARD (2273)  
E-mail: [info@bardsolutions.com](mailto:info@bardsolutions.com)  
Website: [www.bardsolutions.com](http://www.bardsolutions.com)



**FileMaker.**  
An Apple Subsidiary  
Business Alliance

BARD BUSINESS SOLUTIONS INC. is an  
Associate Member of the FBA.  
[www.filemaker.com](http://www.filemaker.com)