

Management Software



Do you want to:

- Organize and manage your complete shop process from one program.
- Ensure that nothing “falls between the cracks”, keep in touch with clients and attract new business.
- Increase your speed and accuracy of estimates and produce competitive quotes.
- Provide better client service by knowing the status of any docket.
- Receive live analysis of every docket and know what your margins are before you invoice your client.
- Work better and smarter as a team by eliminating duplicate efforts and lost time, by sharing information.

... then have a look inside...





Clients & Prospects

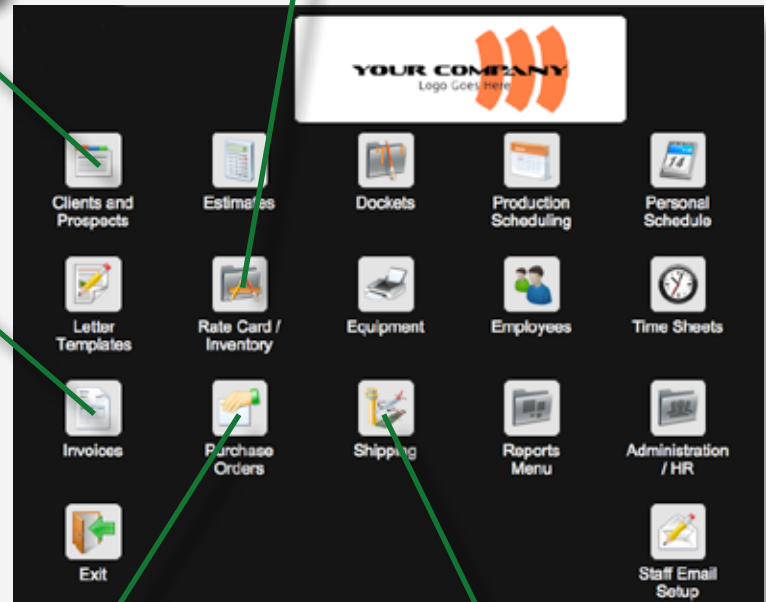
- CRM for clients, prospects and suppliers
- company name and address, multiple contacts, phone numbers and email addresses
- record all correspondence, letter writer, marketing information, form letters, summary information linked to estimates, docket and invoices

Rate Card & Inventory

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

Invoices

- generate and track billing information to your clients
- invoice numbers are automatically created
- invoices can be generated from docket 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 docket
- for 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 found quickly

Shipping

- label generation for number of boxes to one or multiple destinations
- option to import destinations from a spreadsheet
- costs either internal or courier are tracked



Estimates

- track all your estimates for your clients
- setup section allows you to enter all the relative parameters and specifications for the estimate
- prices are automatically entered for you based on the rate card table, with the ability to override
- 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

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
- 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

Production Scheduling

- all tasks required for each docket are tracked along with the department and / or person responsible to complete
- calendar interface for daily, weekly and monthly views
- personal view for a detailed task list

Employees

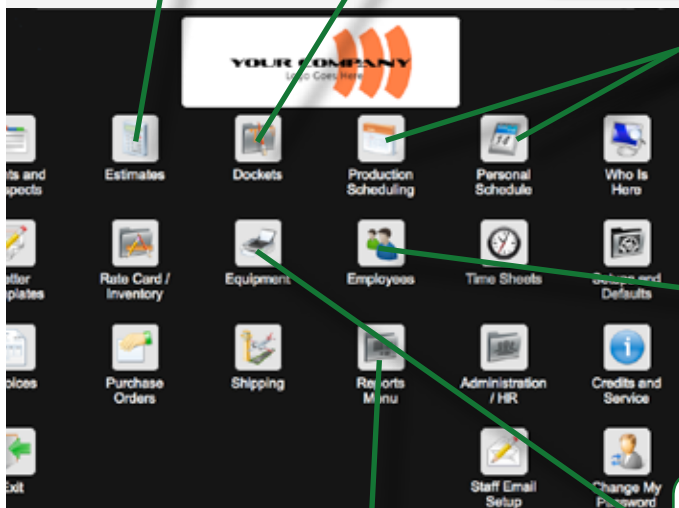
- information regarding your staff
- their relative job functions, cost and billable hourly rates
- populates the menu lists in the Time Sheets

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

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 start and end dates for a range of records
- some reports allow you to optionally select a single client code to filter the report printouts



Efficient Information Flow Is Important To The Success Of 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.



BARD BUSINESS SOLUTIONS INC. is an Associate Member of the FBA.



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Platforms

The Graphics Manager is developed in FileMaker Pro and runs on the Windows XP, Windows Vista / 7 and Mac OS X platforms for a multi-user environment.

Minimum system requirements

Mac:

Mac OS X 10.6, Intel-based Mac, 1GB RAM, Mac OS X 10.5, PowerPC G4 (867MHz+), PowerPC G5, Intel-based Mac, 512MB RAM, Mac OS X 10.4.11, PowerPC G4, G5 or Intel-based Mac, 256 MB of RAM.

Windows XP:

Windows XP Professional or Home Edition (SP 3), Pentium III 700MHz or higher, 256 MB of RAM.

Windows Vista / 7:

Windows Vista Ultimate, Business or Home Edition, 1 GHz or higher, 1 GB of RAM, SVGA (1024x768) or higher resolution.

Versions stated are the minimum requirement. The software may also work with later versions certified by FileMaker, Inc.

Product activation is required for use of this product. Activation may be completed via Internet or telephone.

For complete system requirements, please visit: www.filemaker.com/products/fmp/tech_specs.html

For more than 9 users,
FileMaker Server 10 is required:
[Minimum system requirements](#)

Mac:

Mac OS X 10.5.4 and Mac OS X Server 10.5.4 or higher

Windows:

Windows 2003 Server Standard Edition SP2, Windows 2008 Server SP1, and Windows Vista Business SP1