

Management Software

*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, 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
- 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 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 any shipping labels for any destination

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

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

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
- some reports allow you to optionally select a single client code to filter the report printouts

Clients & Prospects

- full contact management
- correspondence
- marketing information
- letter writer
- history

Estimates

- rate card
- automatic calculations
- unlimited templates
- margins
- RFQ's

Dockets

- planning & scheduling
- costing
- time sheets & equipment
- purchase orders
- shipping & receiving



Invoices

- automatic creation
- customer statements
- commissions & fees
- payments
- accounts receivable

Reports

- estimates; sales & performance
- docket; costing analysis
- inventory; status and orders
- financial; sales and margins
- exports to accounting programs

Purchase Orders

- automatic creation from estimates
- vendor statements
- vendor invoices
- payments
- accounts payable

What the Enterprise Manager application can do for you

In dealing with today's markets, it is imperative that your company maintain accurate data on clients, rates, estimates, production dockets, production scheduling, costs, purchase orders, shipping and invoices.

The power of this application is derived from the philosophy that you "enter data once and use it many times".

Several programming links are setup between all areas of the Enterprise Manager. To increase efficiency and accuracy, simply select an item from a drop down menu and all the appropriate information is filled in for you automatically.

Special Needs: We build customized solutions to suite your business needs.

Platforms: The Enterprise Manager is developed in FileMaker Pro and runs on both the Mac OS X and Windows XP, Vista platforms for a multi-user environment.

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. Let the software work for you, instead of you working for the software.



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



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Platforms

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

Minimum system requirements

Mac:

Mac OS X 10.4.8, PowerPC G3, G4, G5 or Intel-based Mac, 256 MB of RAM, CD-ROM drive.

Windows XP:

Windows XP Professional or Home Edition (SP 2), Pentium III 500MHz or higher, 256 MB of RAM, CD-ROM drive.

Windows Vista:

Windows Vista Ultimate, Business or Home Edition, 800 MHz 32-bit (x86) or higher, 512 MB of RAM, SVGA (800x600) or higher resolution, CD-ROM drive .

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 9 is required:

Minimum system requirements

Mac:

Mac OS X 10.4.9 and Mac OS X Server 10.4.9

Windows:

Windows 2003 Server Standard Edition SP2, Windows 2000 Server SP4, and Windows XP