

The Measuring Service Accounting System (MESA)

Version 2.4

**Making the paper work tasks of the product measurer simpler,
with full work tracking and year to date income reports.
Saving you time and money.**

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Introduction

The Measuring Service Accounting System program supports the task of measuring homes and offices for Carpet, Vinyl, Tile and other flooring products. It provides an electronic archive of all jobs and the associated drawings so work can be review and even old locations review for new work. In storing all the information about each measuring job, which the system refers to as a PO, the program generates invoices; Emails work totals to a District manager and provides income reports by week, month and year. The program provides the missing piece between all the job information and needed business accounting.

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1.0 Features of The Measuring Service Accounting System (MESA), Version 2.4.42

- Prints routing work sheets with customer information sorted by location or time
- Prints customer work sheets for drawings and calculations
- Prints extra works sheets needed for Home Depot jobs
- Stores Purchase Orders or Work Orders from store
- Provides an index of all customers
- Generates Income Reports by Day, Week, Month and Year
- Generates Profit and Loss Statement
- Generates Income report for year by Store
- Has Expense Ledger to track business expenses and report by Month and Year Totals.
- Can search on all fields of a Purchase order: customer name, address, PO Number, date, phone numbers, etc.
- Stores drawings with each job for later retrieval for new work at same site or to send via Email or FTP to store.
- Manages multiple measures under one business, separates reports of their work and totals for business.
- Sends work rollup reports for Home Depot jobs to district manager.
- Generate work sheets by product (Carpet, wood, vinyl, tile, etc. .). customized by store needs.
- Can send all job information and drawings to store when work is completed.
- Supports FTP of drawings and any customer signed sheets to regional web site with the push of a button.
- Can use Email to send drawings and customer job information to local or regional manager.
- Works with any scanner or fax software that supports the tif image format.
- Has Option to put local Map page and quadrant numbers or do an Internet look up to show the location on a Map.

1.1 Future options

- Interface with drawing program to eliminate manual house drawings and calculations of areas.
- Support distributing PO information to client measurers electronically
- Multiple drawings per PO, to track rework and customer changes.
- Track alternate Income in business total Profit and Loss Statement

2.0 Description

Before flooring materials can be purchased, it is necessary for measurements to be made. These measurements of a room, show the size, form and area, this is used to determine the amount of materials needed. Trained professionals, known generally as measurers, make these measurements. MESA automates the processes of accounting, scheduling, reporting and billing for these measurers to improve efficiency and to save time and money. In the case of Home Depot, it tracks all work involved in receiving a store's work orders (or purchase orders), logging the planned work, generating routing sheets, work sheets, and the special forms required for Home Depot including the special Home Depot forms for the Allstate Insurance Company. The system supports multiple stores and keeps a list of all customers and the requested work. This provides an on-line history, which can be used to recall the customer information for use for additional work, or for an estimate by a different store. The program also supports a WEB site interface where stores can post work, which can be downloaded directly into the program.

The program saves time in business accounting, by keeping a record by store, all estimating work orders or Purchase Orders with customer information for end of week, month or year reports. All information such as: work orders, customer addresses and contact information, the list of products, standard widths are stored in tables for referencing and for entering a new work orders. This saves time when entering a new work order by providing pull down pick lists for automatically filling out common fields. The program organizes the work by creating a routing sheet that can be organized by time or by common locations. It saves time and money by reducing the number of faxes that are sent and received and it avoids the problems of reading faxes that have been sent more than once. It helps at income tax time by providing reports of work done for the year and, for the master version, it provides reports showing work done by each measurer including the commissions received.

It generates business reports of work done by week, month or year and a special report of work done in certain areas that are defined by their zip code. It supports an EMAIL and fax interface to send invoices to stores for work done. The main work sheet generated by the program is used to log work done at a customer site. It can be customized with different check items for each product to meet each store's needs.

To eliminate faxes and mistakes that are made by transcribing faxed information into the program, there is a web support option that allows stores to enter estimating jobs online. Once entered, the information can be transferred directly into MESA. This eliminates the store typing and faxing the order then you having to retype the information into the program. It also provides a feed back report to the store managers on-line, so they can see which jobs have been posted and which jobs the measurer has picked up.

3.0 Product Versions

There are three versions of the program, the Stand-alone, the Enterprise, and the Remote. All products function the same and are centered on the Work/Purchase Order. The Stand-alone is for an individual independent measurer, the District version is for someone that measures and also has other measurers working for them. Supporting the Master version is the Remote version for the measurers that work for the District manager.

An optional feature is the web interface. The web interface allows stores to post work using a web form during the day, then that night the jobs can be downloaded into the program. The program has an entry screen, the PO screen, for normal posting of Work/Purchase orders.

3.1 Stand-alone Version

This is the basic version. It allows a measurer to track their work orders for measuring jobs. It provides all business reports, generates the job routing schedules, and work sheets. The system tracks work from each store that issues a purchase order. It allows the store the option to use, or not use, a purchase order number. The customer information is stored with the work order. This allows online retrievals for return work, providing search options on any field such as: name, address, date, phone number, etc. The user in this version can update all reference tables; products, standard widths, options for work sheets and, business information tables. The stand-alone version can produce all reports

3.2 Enterprise Version

The Enterprise Version supports a District Manager and has all the features of the Stand-alone version. In addition, it has the ability to export purchase orders to a web transfer buffer for downloading by a specific remote measurer, using the Remote Station version. It can also import from the transfer buffer Pos posted by the Remote Station or from the store web input screen.

The District Manager Station configures all control files. The control files are the tables like the list of Stores, the options on the reports, the business slogan. It tracks work done by all measurers and provides reports totals of all work done, work done for measure at District Station, and by each remote measurer.

The District Manager Station can have other District Managers working and reporting to them.

3.3 Remote Version

This version works in support of a District Manager Enterprise Version. This version can enter new Work/Purchase orders directly into the program, or from work posted by a store for that remote measurer, or from Pos transferred up to the web from the District Manager Station. After working the PO the remote station can transfer via the web link the updated PO information back to the District Manager Station. The Remote Station cannot change the program control files. They are updated from the District Manager Station and sent via the web interface to the remote stations. It can change its business information properties and run reports on the work done by the remote measurer.

3.4 Demo Version

A Free 60 day Demonstration release for each product version can be provided. Just fill out our demonstration request form, download the software and we will send you a 60-day license key. If the product meets your needs, you can purchase a license and convert your demonstration copy into a production release and continue with the information already entered.

3.5 Product Upgrades.

The Remote Version can be upgraded to Stand-alone keeping the remote measurer information as the Stand-alone measurer. The Stand-alone version can be upgraded into a District Version, keeping the Stand-alone information as the District business and the prior work done as one of the measurers managed by the District Station.

3.6 Software Support

For the first year after purchase, the program is upgraded to latest release in the version series, such as 2.x, free. Maintenance contracts are available. Version upgrades will be sold at great discount to valid customers.

4.0 Menus

The Measuring Service Accounting System is a menu driven software application designed to make scheduling, measuring jobs, job tracking and, business accounting as simple as possible. The program has three main menu screens and thirteen support screens. The Main Menu (Figure 1, below) lists the key input form. The Purchase Order screen is shown in Figure 6.

The Other Information Menu is shown in Figure 2. The last general menu is the Product Information Menu, shown in Figure 3. It shows the Product List and associated standard material sizes for each product. The key Company Information Form is shown in Figure 8. The Company Information Form has the name, address and other information used for reports and display in the program.

The Business Reports shown in Figure 17 are used for business accounting. Figure 18 shows the form to view the activity report to send to Home Depot or to generate a generic Invoice to other companies. Work Schedule is shown in Figures 21 and 22. They are used to schedule measuring jobs, reschedule if needed, and then close the job.

4.1 Opening Menu

This is the program's opening menu. From this menu, you can enter and exit all options for the program. The first option is the main work screen for entering Purchase Orders or store Customer Job information. The next selection goes to the program configuration options. After that are the selections to run business reports, enter and close work schedules, and generate invoices. The last two options work with the Store WEB option, to view jobs posted to web site by store both waiting to be downloaded and the ones that have already been downloaded..

The program displays the business name at the top of each form and the Version control number under the business graphic.

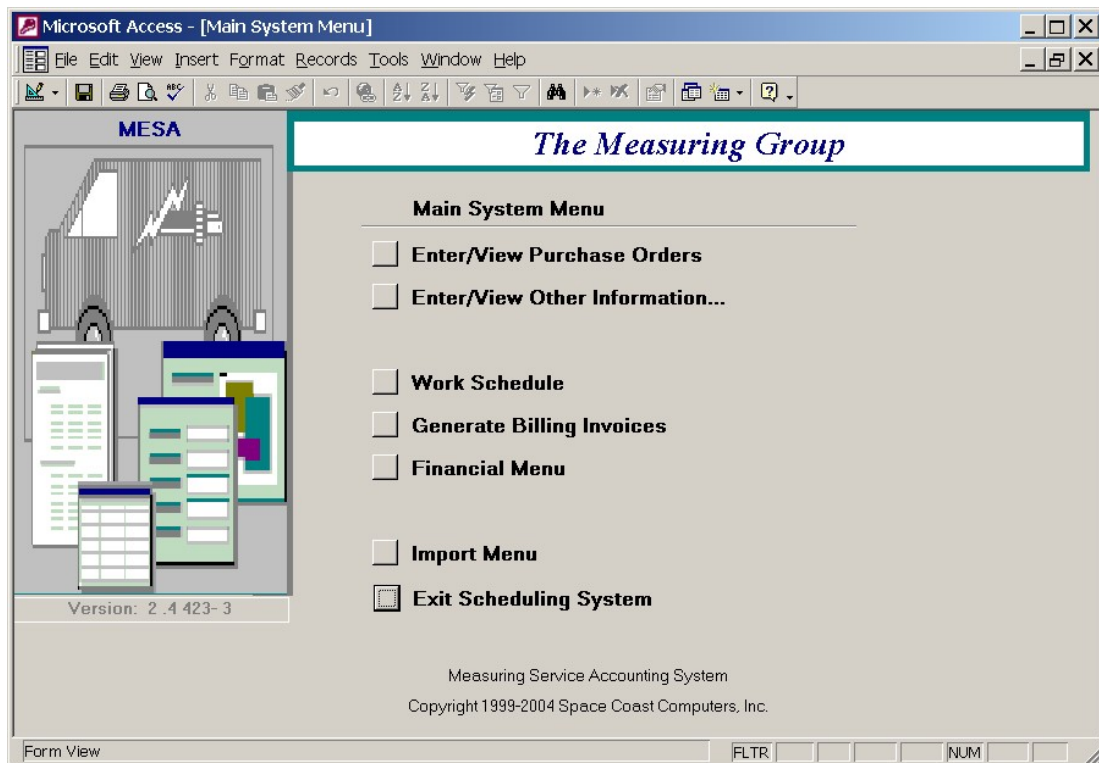


Figure 1

4.2 Other Information Menu

The Other Information Menu is shown in Figure 2. It is used to control the actions of the program, identify the business name, address, owner, measures, Products sold, and other control items. These options are described later.

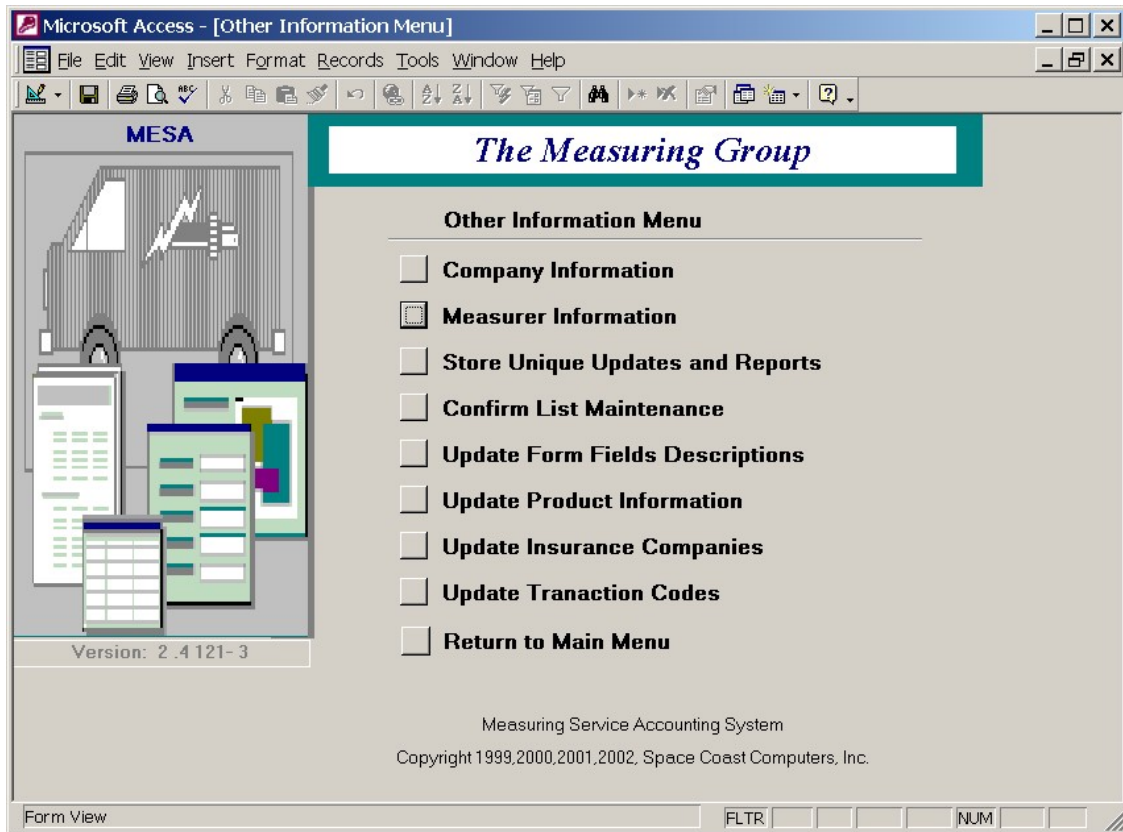


Figure 2

4.3 Product Information Menu

This allows access to the two configuration tables for the products sold and standard widths of the products sold. These are detailed later.

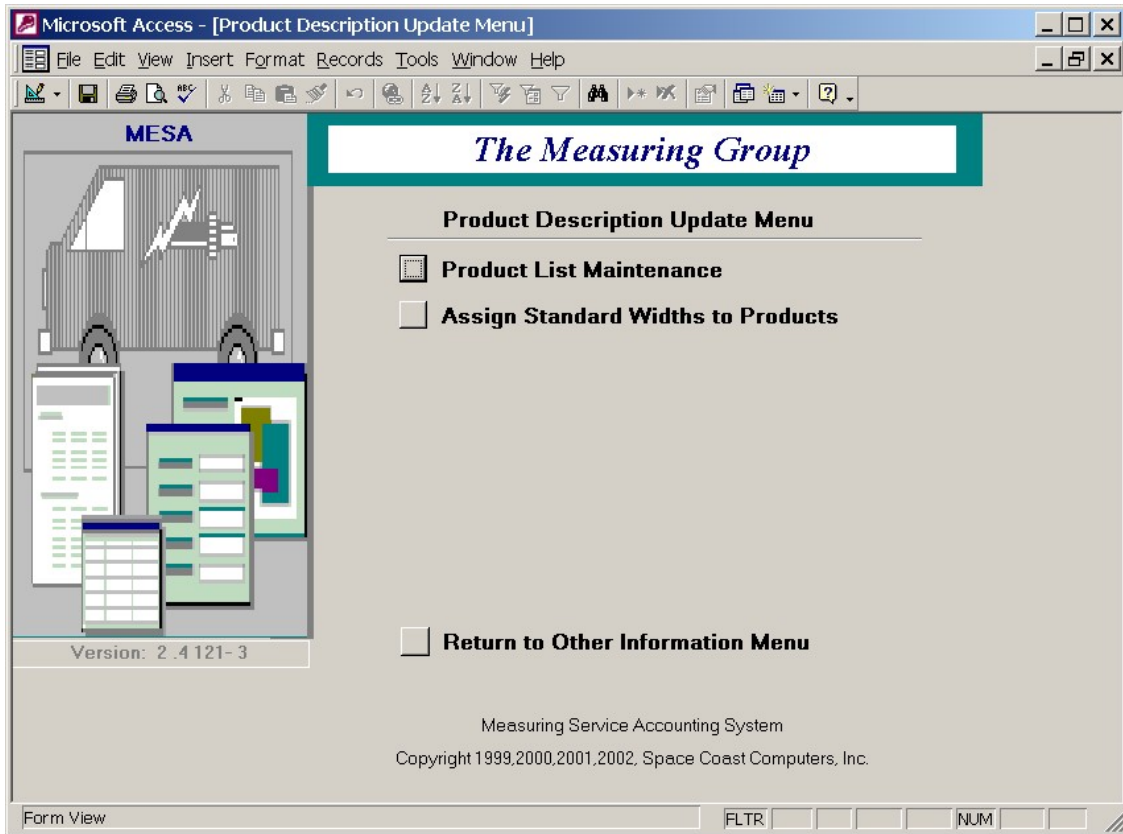


Figure 3

4.4 The Financial Menu

This menu provides access to the business expenses input ledger, the table of business expense categories and Expense Reports.

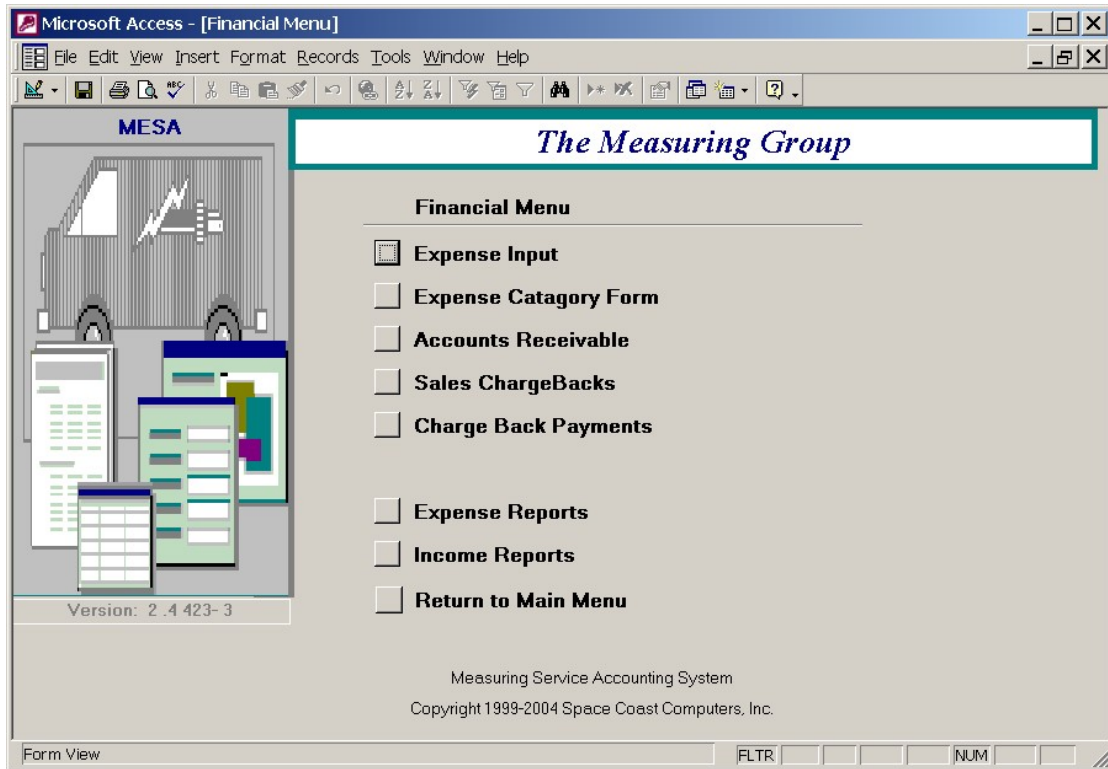


Figure 4.

4.5 The Import Menu

The system can import jobs from a WEB Site or can receive jobs completed by a remote measurer and import those jobs via an EMAIL from the remote measurer. This menu lets you view new jobs posted on the WEB waiting to be downloaded, or show the list of jobs that have already been downloaded. It also provides the same options to view new jobs received from the remote measurer that are ready to be imported, or view the history list of jobs that have already been imported.

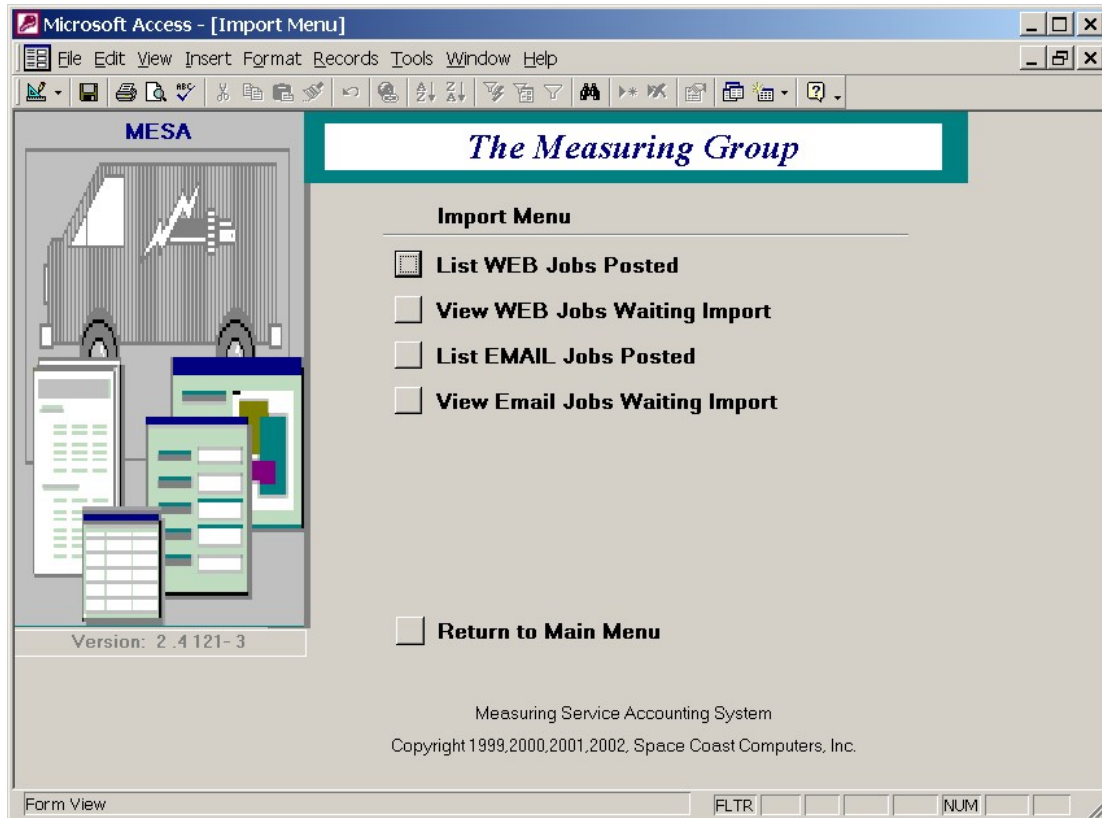


Figure 5

4.6 The Purchase Order or PO Screen

The Job Purchase Order Entry Form is the heart input screen of the system. All information about a job is entered and tracked from this form. This form provides the who, what, when, where about the job. This form also shows the amount paid for the job. The District version also shows the measurer.

The left side has the customer information, the center has the work order information, and the right side has the Store information. Also on the right side is, the search option, the list of drawings window and, the information about the expense and income. The Customer Work window is where the list of products, the installation areas, product width and repeat information is stored. A work sheet is printed for each product type using the View Work Sheet(s) option. The View Drawings label and Button are enabled when there is a drawing(s) stored for this job. The Email Drawings to Store button is a dual function button depending on the store options. If the store wants drawings Email the button say Email and send the drawings by Email to the Store Email account. If the store wants drawings send to their WEB site, the button reads FTP drawings to store, and uses an FTP process to send the drawing to the store WEB site. In both cases, the drawing name is changed to the PO number.

The screenshot shows the 'Job Purchase Order Entry Form' in Microsoft Access. The form is divided into several sections:

- Customer Information:** Includes fields for Name (Glenn Seaton), Address (Po Box 6698), City (Titusville), State (FL), and Phone ((321) 267-6459).
- Work Order Information:** Includes PO Date (2/21/2004), Schedule Date (2/21/2004), PO No. (60110540), and Order No.
- Store Information:** Includes Look up Store (Home Depot Melbourne), Store No (H,260), Store Phone ((321) 728-1900), and Expediter (Kathy).
- Transaction and Billing:** Includes Transaction Code (302), Billing Amount (\$0.00), and Charge Back (\$0.00).
- Customer Work Table:** A table with columns: Product, Areas, Width, Repeat. The first row shows 'Armstrong Laminate' with Area 'A1', Width '12ft', and Repeat 'R1'.
- Buttons and Controls:** Includes 'View Drawings', 'View Notes', 'View Work Sheet(s)', 'Send to Store', 'Print Invoice', 'Send to Remote', and 'Delete PO'.

Figure 6

Once a job has been completed and logged, the Job Completed button is turned on. When the jobs is completed, the form is locked to prevent accidental changes to the information on the form.

As and alternate to a map book with Page and Section information, after the Address information has been entered, the Show Map, button will turn on. This will automatically open your Internet Browser, go to Yahoo Maps and display the map showing the location of that job. Note you are required to be On-Line for this to work.

4.7 Expense Entry Form

This is the business expense ledger.

**Business Expenses for
The Measuring Group**

Date	Check	Description	Amount	Category
1/2/2002		jan stuff	12.00	Car
1/2/2002		jan stuff	12.00	Computer
8/1/2002		aug stuff	100.00	Meals
8/2/2002		fix car	200.00	Car
8/3/2002		sleep	50.00	Hotel/Motel
8/6/2002	1234567	CHECK test	1234.00	Office Supplies
8/6/2002		test	1.00	Misc
12/10/2002		more	23.00	Office Supplies
12/10/2002		this is a long description of this expense and that's all	122346.00	Books
* 8/6/2002			0.00	

Record: 1 of 9

Exit Business Expense Form

Record: 1 of 5402

Form View

Figure 7

5.0 Program Setup

This section shows the different setup screens that configure the operation of the program. There are three areas, the Company Information form, the Measurer Information form and the individual Store forms. The last setup area is the control all the lookup tables. These are the tables control the options of the different from Insurance companies, to options on the different work sheets and reports.

5.1 Company Information Form

This is the main configuration control form. The entry Company Name is the name you establish as the Business Name. Its address appears on all the reports. The master Measurer ID is part of the business information with the District number. The measurer ID on this form is verified with the License Number. The company slogan appears at the bottom of the Invoices.

There are three drawing folders to tell the system where to find drawings for each Purchase Order entered. The normal usage would be to put new drawings into the Drawing Path, and then after backups are done, the files are moved to the folder pointed to by the Local Archive Path. Drawings can also be saved to a CD if a CDRW drive is available. The normal program usage is for Drawing Archive to be the CD ROM drive letter. The CD would contain older drawings that are no longer in the Local Archive Path. The system checks access to the folders and turns on the path failed box at the end of each path. This failed flag is used to keep the system displaying errors every time it tries to view the drawings stored there.

The Email area is for sending reports by e-mail. The Email Name is the easy to read Name that shows up when you receive Email to show who the mail was from. The Email Address is the address of your personal Email Address or business Email Address. The Email address would be used if someone wanted to send you Email to ask a question about the report you sent. The Email Server is the SMTP Relay host is usually provided by your ISP and used to configure your personal Email settings as SMTP Address. It is required here to allow you to send e-mail from inside the program. The Bulk Email address is that of the recipient of the work reports. The Transfer values support the Master Station providing the email address and account used to transfer PO information and drawings from Remote Stations to the Master Station.

Company Information

Company Name: The Measuring Group
Address: PO Box 6698
City: Titusville
State/Province: FL **Zip Code:** 32782-
Phone Number: (321) 267-6459
Fax Number:
Measure ID #: 321
District: 32

Email Name: Glenn Seaton
Email Address: glenn@seltron.com
Email Server: smtp-server.cfl.rr.com
Bulk Billing Email: sales@seltron.com
Transfer UserID: tmstransfer
Transfer Paswd: Password goes Here
Transfer Server: seltron.com

This information is used on all the reports, identifies the master
 Measurer ID # and has the path to the drawing files.
 Slogan is printed on the Invoice Sheet.
Email and Upload Link Information

Company Slogan: WE SAVE YOU TIME AND MONEY

Drawing Path: c:\seltron\smsdrawings\ Path Failed
Local Archive Path: c:\seltron\smsdrawings\darchive\ Path Failed LA
Drawing Archive: d:\ Archive Path Failed

License No: 999324020928000321BA2B15

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Figure 8

5.2 Measurer Information

The System supports one Master Measurer and multiple supporting Measurers. The Measurers Information form has the information about each measurer. The first measurer is the business owner information. The left window shows the list of measurers. Selecting one of the measurers in the list displays their information. The **Is Independent** flag is for a measurer whom works for you and you track, but do not pay commissions.

The screenshot shows a Microsoft Access window titled "Microsoft Access - [Measurer]". The main form area has a light blue background and is titled "Enter/Update Measurer Information and Set Default Measurer". The form contains the following fields and controls:

- Measurer ID: 123
- Name: Glenn Seaton
- Address: PO Box 6698
- Phone: (321) 267-6116
- City State Zip: Titusville, FL 32782
- Pager: (empty)
- Password: Hi There
- Commission Per Job: \$0.00
- Local Default Measurer: Glenn Seaton (selected in a dropdown list)
- Is Independent
- Buttons: "Add Measurer" and a button with a plus sign and a cursor icon.

At the bottom of the form, there is a copyright notice: "Copyright 1999,2000,2001,2002, Space Coast Computers, Inc." The status bar at the bottom shows "Record: 1 of 1" and "Form View".

Figure 9

5.3 Setup Store Information

All work done by a measurer is setup to be done for a store, such as Home Depot. The Store Information Work Sheet adds the store to the Store list on the PO Screen. The information this form is printed on reports, used to calculate money made per measure and it indicates where drawings should be sent by FTP or Email. Only the Store Number (Store No) must be unique.

The WEB URL is the address where drawings should be sent as captured from the WEB Browser. If the WEB URL is used and is in the correct format as show in image below, the address, folder and User ID will be extracted and those fields filled in automatically.

Store Information Work Sheet

Store No: 1,260 Long Distance From Store:

Name: Home Depot Melbourne Extra For Long Distance: \$0.00

Address: 2865 W New Haven Ave Base Pay: \$25.00

City: West Melbourne Flat Rate Measurement Fee:

State: Florida Zip: 32904 Set Store Inactive:

Phone: (321) 728-1900

Fax: (321) 728-7923

Expediter: Kathy Update Store Information, pay schedules and Email and WEB Upload values.

Expediter No: (321) 952-7406

Send to Store via: WEB

Email Name:

Email Address:

WEB URL: ftp://g_seaton@ftp.fcstampa.com/Drawings/HomeDepot/0260/

WEB Address: ftp.fcstampa.com

WEB Folder: Drawings/HomeDepot/0260

WEB UserId: g_seaton

WEB Password: No Good Password

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Record: 1 of 2

Form View NUM

Figure 10

5.4 Insurance Company Setup

The Insurance Company Setup form lists the insurance companies. This table makes sure spelling is consistent for searches and is used to identify special forms required by the insurance company. You can add or delete insurance companies from this list. This list shows up on the PO screen as a pull down list.

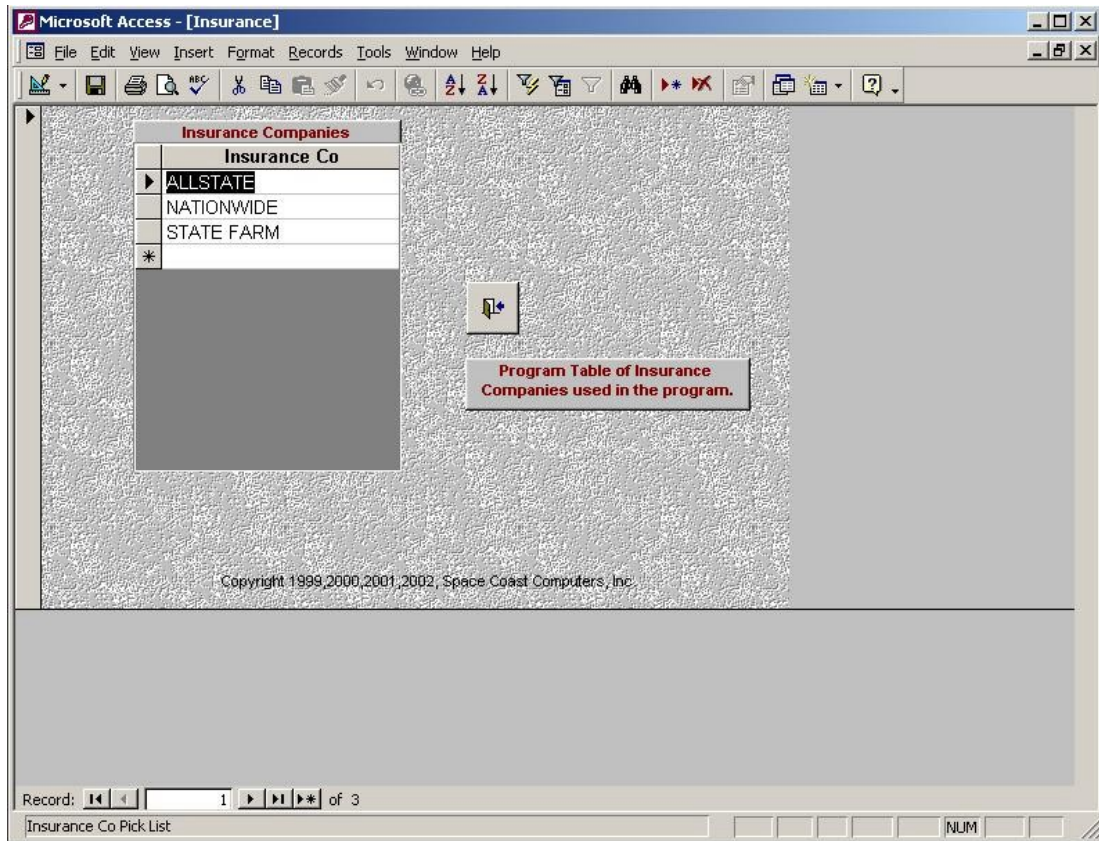


Figure 11

5.5 Transaction Codes to Description

Transaction Codes are the work codes that translate a type of job to the job code number.

Microsoft Access - [tranxcode : Form]

File Edit View Insert Format Records Tools Window Help

Update Transaction Codes and Descriptions

tranxcode subform

tranx_code	tranx_desc
160	Burdines Flooring
302	Flooring
331	Windows
910	Refigure
*	0

Transaction Codes and Descriptions link what type of business activite is associated to what Transaction Code.

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Record: 1 of 1

PO Transaction Code

NUM

Figure 12

5.6 Product Form Setup for stores

This form is created automatically when you add a store. It controls all the different options at the bottom of the job work sheet. If a store does not want to see all the options you can delete them from the work sheet for that store here. It is recommended that you do not change this form.

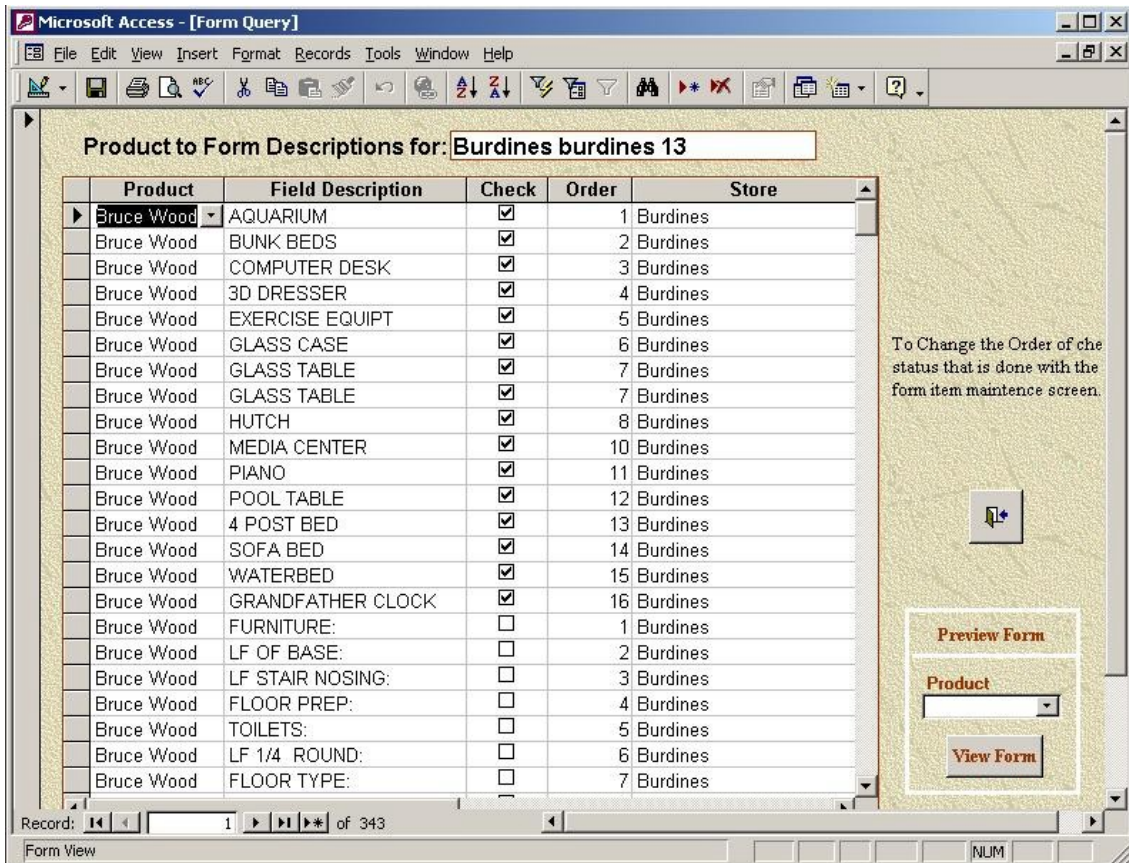


Figure 13

5.7 Assigning Standard Widths to Products

This is the standard list of widths associated with a product. This table would only need changing if you added a new product line or a standard product came in a new standard size.

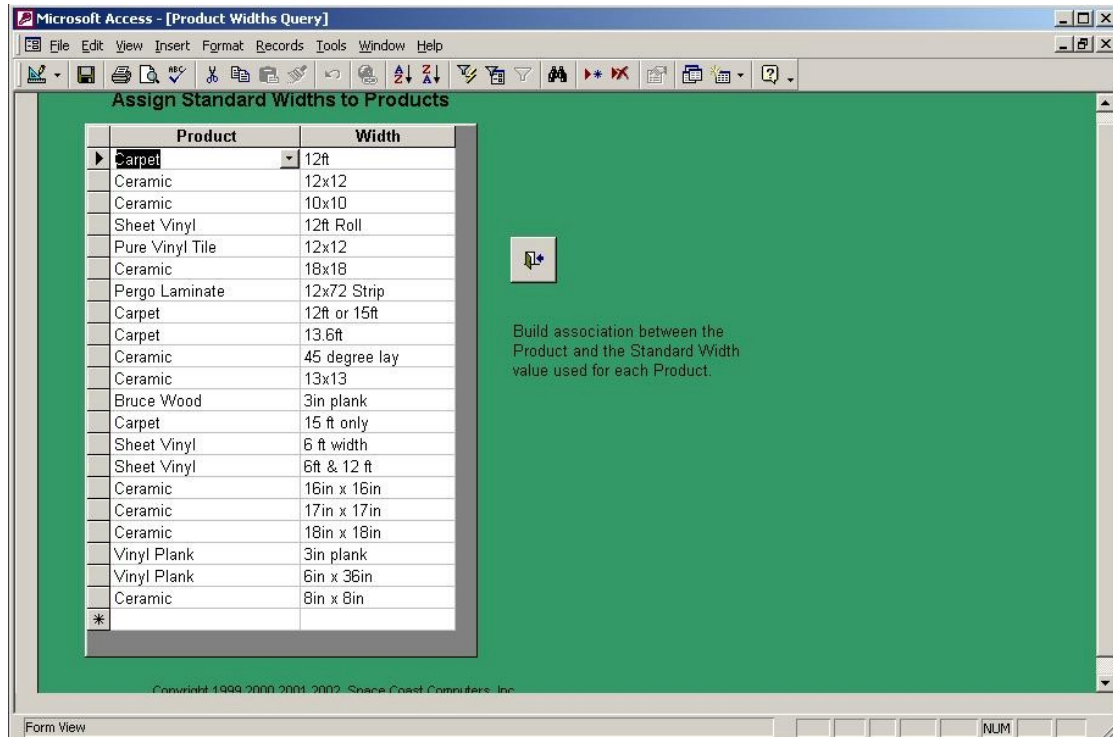


Figure 14

5.8 Business Product List

This table lists the different products with their abbreviations. The abbreviation is used on the work routing sheet to save space printing all the daily jobs. It also flags when printing the product, if the width needs to be printed also and in what units.

Product List Maintenance

Product	Abbrev	Print Widths	Units (Ft/Yd)
▶ Armstrong Laminate	LAM	<input type="checkbox"/>	Ft
Bruce Wood	WOOD	<input checked="" type="checkbox"/>	Ft
Carpet	CPT	<input checked="" type="checkbox"/>	Ft
Ceramic	CER	<input type="checkbox"/>	Ft
Columbia Wood	WOOD	<input type="checkbox"/>	Ft
Linne Wood	WOOD	<input type="checkbox"/>	Ft
Mannington Wood	WOOD	<input type="checkbox"/>	Ft
OPTION Carpet	CPT	<input checked="" type="checkbox"/>	Ft
OPTION Ceramic	CER	<input type="checkbox"/>	Ft
OPTION Laminate	LAM	<input type="checkbox"/>	Ft
OPTION Vinyl	VIN	<input checked="" type="checkbox"/>	Ft
OPTION Wood	WOOD	<input type="checkbox"/>	Ft
Pavors	PAV	<input type="checkbox"/>	Ft
Pergo Laminate	LAM	<input type="checkbox"/>	Ft
Pure Vinyl Tile	PVT	<input checked="" type="checkbox"/>	Ft
Sheet Vinyl	VIN	<input checked="" type="checkbox"/>	Ft
Vinyl Composition Tile	VCT	<input type="checkbox"/>	Ft
Vinyl Plank	VIN	<input type="checkbox"/>	Ft
Wilsonart Laminate	LAM	<input type="checkbox"/>	Ft
Wood	WOOD	<input type="checkbox"/>	Ft
*		<input type="checkbox"/>	Ft

List of Product work form.
Enter Product name the Abbreviation to be used in the program, if the width is printed on the Product Work Sheet and the normal unit of Measure for each Product.

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Figure 15

5.9 Business Expense Category List

This list is the pick list for Business expense category organization. Items must be added to this list to appear as an option in the Business Expense Ledger.

The screenshot shows a Microsoft Access window titled "Microsoft Access - [Expenses Query]". The main area displays a form titled "Expense Categories for *The Measuring Group*". The form contains a list of categories with a header "Category". The categories listed are: Books, Car, Computer, Gas, Hotel/Motel, Meals, Misc, Office Supplies, Paper, and an asterisk (*). Below the list is a button labeled "Exit Expense Category Form". The status bar at the bottom indicates "Record: 1 of 9" and "Form View".

Category
▶ Books
Car
Computer
Gas
Hotel/Motel
Meals
Misc
Office Supplies
Paper
*

Figure 16

6.0 Reports and Invoices

6.1 Income Reports

The Business Reports shown in Figure 7 are used for business accounting. The menu provides work reports by week, month, year and measurer.

The screenshot shows a Microsoft Access form titled "Income Reports". The form is divided into several sections:

- Reports**:
 - Buttons for "Week Totals", "Totals for Month", and "Account Rec Report".
 - Fields for "Start" (2/29/2004) and "End" (3/6/2004).
 - A "Measurer" dropdown menu set to "Glenn Seaton".
 - An unchecked checkbox for "All Measurers".
 - Buttons for "Totals for Year" (1/1/2004 to 3/6/2004) and "Income Summary".
 - A "Profit and Loss" button and a "Federal Mileage Allowance" field set to 0.375.
- Support Reports**:
 - Button for "Installer Job Summary".
 - Fields for "Start" (3/6/2004) and "End" (3/6/2004).
 - A dropdown menu for "Home Depot Store".

At the bottom of the form, there is a copyright notice: "Copyright 1999-2004 Space Coast Computers, Inc." and a "Form View" indicator.

Figure 17

In the first section, Income report show gross income projections based on work scheduled and completed. Payment may not have been received for this work yet. The Account Receivable Report shows work with payment due. The Income Summary shows Income projection by store and the Profit and Loss Report show actual income and expenses.

The Support Reports shows summary of the Home Depot work done during the specified time using their report summary format.

6.2 Invoice Generation Form

The screenshot shows a Microsoft Access window titled "Microsoft Access - [bill work : Form]". The window contains a form titled "Generate Billing Invoices" with a teal background. At the top left of the form is a "Print" button. Below it are three buttons: "Home Depot Report", "Home Depot Mail Report", and "Invoice Store". To the right of these buttons are two date input fields labeled "Start" and "End", both containing the date "2/3/2002". Below the "Home Depot Mail Report" button is a "Store Name" label and a dropdown menu. A small icon with a plus sign is located to the left of the instructional text. The instructional text reads: "Generate Billing Invoices for Work Done. Enter date range when work was done to generate invoice for. The Home Depot Reports buttons, build the special report in the format needed to send electronically to Home Depot. The first Home Depot Report button generates and displays the report. The second Home Depot Mail Report button generates a file and displays the file name to Email. To print an Invoice to a store, select a store the press Invoice Store." At the bottom of the form, the copyright notice "Copyright 1999,2000,2001,2002, Space Coast Computers, Inc." is visible. The window's status bar at the bottom shows "Form View" and a "NUM" indicator.

Figure 18

7.0 Work Scheduling

7.1 Scheduling Control Form

This form is used to schedule jobs once entered on PO Form. The job order can be scheduled by location or by time of day. The Routing Schedule is printed by map coordinate and then by time. The Bulk Work Sheets prints the product pages for each job and the Home Depot and Insurance forms as needed.

Once a job is completed or if it needs to be rescheduled, the Close Routing Schedule Sheet shown in Figure 11 is used. When closed, an option can be selected to email the information and drawing to the store.

The screenshot shows a Microsoft Access window titled 'Microsoft Access - [Company Information1]'. The main form is titled 'The Measuring Group' and 'Route Schedule Planning, Printing and Closing Menu'. It features several interactive elements: a 'Plan Routing Schedule by Map' button, a 'Routing for:' field with the value '2/5/2002', a 'Plan Routing Schedule by Time' button, a 'Measurer:' dropdown menu with 'Glenn Seaton' selected, a 'Preview Routing Schedule' button, a 'Bulk Work Sheets' button, and a 'Print Now' checkbox. Below these are 'Close Routing Schedule Sheet' and 'Email Completed Work to Store' buttons. A central icon with a plus sign is also present. To the right, a text block explains the form's purpose: 'Generate Routing and work sheets for next days work. Build the Route Plan by Map coordinates or time. Preview Routing Schedule all for selected day and Print individually, or Print All if Print Now is selected. After job is completed or needs to be rescheduled, Close Routing shows all not completed Jobs.' The footer includes 'Copyright 1999,2000,2001,2002, Space Coast Computers, Inc.' and the status bar shows 'Form View' and 'NUM'.

Figure 20

7.2 Schedule Work Control Form

There are two screens that show scheduled work by map location or by time of day. Both screens have the same fields. Once all the jobs are entered from the PO screen, this screen is used to set the time.

The screenshot shows a Microsoft Access window titled "Microsoft Access - [Routing]". The main form is titled "Work Form for Route Sheet by Map Location" and includes a date field set to "2/5/2002". Below the title is a table with the following columns: CustomerName, Customer Phone, Work Phone, Pager/Cell Phone, Schedule Time, Schedule Date, Confirm, Map Page, Sect., and Measurer. The table contains two rows of data. The first row has empty fields for CustomerName, Customer Phone, Work Phone, and Pager/Cell Phone, and "2/5/2002" for Schedule Date. The second row has "12:00 AM" for Schedule Time and "2/5/2002" for Schedule Date. The Measurer field in both rows is set to "Glenn Seaton". Below the table is a large, empty rectangular area, likely intended for a map. At the bottom of the form, there is a record navigation bar showing "Record: 1 of 1" and a copyright notice: "Copyright 1999,2000,2001,2002, Space Coast Computers, Inc.".

CustomerName	Customer Phone	Work Phone	Pager/Cell Phone	Schedule Time	Schedule Date	Confirm	Map Page	Sect.	Measurer
					2/5/2002		0	0	Glenn Seaton
*				12:00 AM	2/5/2002		0	0	

Figure 21

7.3 Close Routing Sheet

This form is used when a job is completed to check completed or reschedule. For completed jobs the billing options of special commercial job, extra for mileage and if the job information is ready to be sent to a District Manager.

CustomerName	Customer Phone	Schedule Time	Schedule Date	Confirm	Completed	Miles	Travel Bonus	Commerical Job	Bill Amount	Send via Email	Measurer
			2/5/2002		<input type="checkbox"/>	0.0	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00	<input type="checkbox"/>	Glenn Seaton
*		12:00 AM	2/5/2002		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	

Figure 22

7.4 Routing Work Sheet

Once the customer has been contacted and the Work Schedule form updated, the work routing sheet can be printed. It can be printed by location or by time of day the job is scheduled. The information comes from the PO screen to show where the job is located, for whom the work is to be done, the list of rooms to be measured and, the scheduled time. A place is provided to log the mileage to the job.

Microsoft Access - [Routing Sheet]

File Edit View Tools Window Help

Schedule for: 2/5/2002

The Measuring Group

Measurer: Glenn Seaton

Routing Sheet

GAS:

Start mileage:

	Name and Address	Phones	Store	Comments	Time	Map	Miles
1			misc			0	0

Page: 1 of 1

Ready

Figure 23

8.0 Store Internet Web Site Download

An optional feature of the system supports a web site where a store can enter a job by filling out the PO screen, which is then electronically transferred into the system. This eliminates typing the PO information from a fax copy. It provides feedback to the store that you received the job, which is something that is not provided by a fax.

8.1 View of Current Jobs to Download

This screen would show jobs posted to the web site by a store ready to be downloaded.

The screenshot shows a Microsoft Access window titled "Microsoft Access - [jobs_waiting : Form]". The window contains a form with a blue header bar that reads "New Jobs waiting Import". Below the header is a table with the following columns: Store #, Ordered, Salesperson, Name, Phone, Addr, City, and Zip. The table is currently empty. Below the table is a record navigation bar with the text "Record:" followed by navigation icons. At the bottom of the form, there are two buttons: "Import" and "Print New Work". The footer of the form displays the copyright information: "Copyright 1999,2000,2001,2002, Space Coast Computers, Inc." The status bar at the bottom of the window shows "Record: 1 of 1" and "Form View".

Store #	Ordered	Salesperson	Name	Phone	Addr	City	Zip
---------	---------	-------------	------	-------	------	------	-----

8.2 View Old Downloaded Jobs

This screen shows all the jobs send from the web site for the last three months. This allows a review of jobs posted to resolve any missing work for that store.

Microsoft Access - [list_posted_jobs : Form]

File Edit View Insert Format Records Tools Window Help

All Jobs Posted for Import

Store #	Ordered	Salesperson	Name	Phone	Addr	City	
K & Y	1/24/2002	Malcolm	Colby, Lisa	321-777-0230	601 Tradewinds Dr.	Indian Harbor	
K & Y	1/24/2002	Malcolm	Wilt, Donna	321-725-7960	2985 Pennsylvania	West Melbour	329
K & Y	1/22/2002	Malcolm	Fokoll, Charles and	321-773-6614	360 Greenway Avenue	Satellite Beac	
K & Y	1/21/2002	Malcolm	Newman, Richard	321-728-1296	791 Pembroke Avenue N	Palm Bay	329
K & Y	1/21/2002	Jim	Rowley, Robert & C	321-984-9898	7939 Timberlake Drive	West Melbour	329
K & Y	1/19/2002	Kim	CLARK, TOBY	321-723-1860	500 RIVER COVE PLAC	Indialantic	329
K & Y	1/18/2002	Kim	Horn, Brian	321-726-0075	974 Ripley Terrace, NE	Palm Bay	329
K & Y	1/16/2002	Jim	Fitzpatrick, Dan		4042 South Babcock	Melbourne	329
K & Y	1/16/2002	Malcolm	Lawson, Roger and	321-752-4829	984 Fostoria Drive	Melbourne	329
K & Y	1/16/2002	Kim	Goodnough, Bill	321-254-5469	2375 Honeybrook Drive	Melbourne	329
K & Y	1/14/2002	George	Pozgar, Kim	321-751-0011	1761 Nicklaus Drive	Melbourne	329
K & Y	1/10/2002	Jim	Priest, Greg		1751 Sarno Road	Melbourne	329
K & Y	1/10/2002	George	WILHELM, STEVE	561 664 7851	7590 CEDAR BARK	MICCO	BA
K & Y	1/10/2002	George	STOKELY	726 8620	219 SEAVIEW	Melbourne Be	329
K & Y	1/8/2002	Malcolm	Thomas, Roy and J	321-751-1251	3944 Turkey Point Drive	Melbourne	
K & Y	1/8/2002	Jim	Litfin, Lynda	321-676-1492	603 Lang Road SW	Palm Bay	329

Record: 1 of 1

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Form View NUM

9.0 Remote Measures updates

The Email Import List allows remote measures to send a master station job information and drawings.

9.1 Email Import List

This screen is used to download import jobs from the server using the "Check for New EMAIL" Button. Once the information and drawings are imported into the program, this screen will show the jobs ready to be imported using the PO Input form.

Microsoft Access - [Email_jobs_pending : Form]

File Edit View Insert Format Records Tools Window Help

EMAIL Jobs Waiting Download

Ordered	Salesperson	Name	Phone	Addr	City	Zip	Pr

Record: 1 of 1

Check for New EMAIL

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Record: 1 of 1

Form View

9.2 Email Import History

This screen shows all the jobs send from the remote station(s) via Email to the master stations. The emails can be kept online for as long as needed. There is an option to get the program PO Input Form to reload the information, but any attachment can only be transferred the first time.

The screenshot displays a Microsoft Access window titled "Microsoft Access - [email_jobs_list : Form]". The window contains a form titled "All EMAIL Jobs Posted" which features a table with the following data:

Ordered	Salesperson	Name	Phone	Addr	City	Zip	Pr
6/28/2002	Louis	Seaton, Glenn		1234 N. Riverside Drive	Titusville	32780	Carpet
7/1/2002	Louis	Seaton, Glenn	(321) 321-4321	1234 N. Riverside Drive	Titusville	32780	Carpet
7/1/2002	Louis	Seaton, Glenn	(321) 321-4321	1234 N. Riverside Drive	Titusville	32780	Carpet

Below the table, a record navigation bar shows "Record: 2 of 3". A "Refresh" button is located below the navigation bar. At the bottom of the form, a copyright notice reads "Copyright 1999,2000,2001,2002, Space Coast Computers, Inc.". The status bar at the bottom of the window shows "Form View" and "NUM".

10. Job Work Sheets

10.1 Insurance Estimating Work Sheet

A form titled "FLOORING ESTIMATING RECORD" with a page number "Page 2 of 4" and a date "FALL 1995". It includes fields for "CUSTOMER" (Seabro, Glenn), "ADDRESS", "CITY", and "STATE". Below these fields is a large area for drawing or notes, containing a small "H". To the right of this area is a table with 15 rows and 2 columns: "Row" (A-M) and "Sq. Ft.". The table is followed by a "Total" section with a "Total Sq. Ft." field. At the bottom left, there is a section for "Customer's Authorization to Team Location" with a signature line and a date field.

Row	Sq. Ft.
A	
B	
C	
D	
E	
F	
G	
H	
I	
J	
K	
L	
M	
N	
O	

For Home Depot Insurance claims it prints both the Special Custom Work sheet in 10.2 it also prints the Home Depot Work Sheet.
The program also prints the Home Depot Forms: 439 *Flooring Installation Specifications* and Measuring Guide and the 546 *What you should Know before the Installer Arrives* .”

10.2 Measuring Work Sheet.

H.250	0	CARPET ORDER 6289 027 6	Date: 6/26/2002
SALESMAN: Cad		Measurer: Harry Sam Itas	
CUSTOMER: Seabla, Glenn		These reviewed the diagram and approval placement based on 12" or 15" goods. I agree these are the only areas to be measured.	
ADDRESS: 123 W. Oak Street Apt# 0, Palm Bay, FL 32907-9439		6" x 6" berber	114 / 25 5425
PHONE: (321) 728-1234 W () - 0 C () - 0		X: _____	

Room	Size
A	
B	
C	
D	
E	
F	
G	
H	
I	
J	
K	
L	
M	
N	
O	
P	
Q	
R	
S	
T	
Total	
Total Sq. Ft.	

<input type="checkbox"/> AQUARIUM <input type="checkbox"/> BUNK BEDS <input type="checkbox"/> COMPUTER DESK <input type="checkbox"/> 2D DRESSER <input type="checkbox"/> ELECTRONIC EQUIP <input type="checkbox"/> GLASS CASE <input type="checkbox"/> GLASS TABLE <input type="checkbox"/> HUTCH <input type="checkbox"/> LARGE DESK <input type="checkbox"/> MEDIA CENTER <input type="checkbox"/> PIANO <input type="checkbox"/> POOL TABLE <input type="checkbox"/> 4 POS BED <input type="checkbox"/> 5 OF A BED <input type="checkbox"/> WATERBED <input type="checkbox"/> GRANDFATHER CLOCK <input type="checkbox"/>	<p style="text-align: center;"><i>Appliances</i></p> <input type="checkbox"/> Refrigerator <input type="checkbox"/> Stove <input type="checkbox"/> Washer <input type="checkbox"/> Dryer <input type="checkbox"/> Freezer	<input type="checkbox"/> FLOOR TYPE. <input type="checkbox"/> FLOOR PREP. <input type="checkbox"/> FURNITURE. <input type="checkbox"/> TYPE OF STEPS. <input type="checkbox"/> NO. OF STEPS. <input type="checkbox"/> BOX / CAPS / SER. <input type="checkbox"/> LF STRIP. <input type="checkbox"/> LF METAL.
---	---	--

This is the MESA detail work sheet with customizable check boxes at the bottom and filled out name and address at the top.

11.0 Reports

11.1 Monthly Balance Sheet

<i>Month Totals</i>		<i>From: 5/1/2002</i>	<i>To: 5/31/2002</i>	<i>Measurer: Harry Samitas</i>	
<i>Schedule Date</i>		<i>Gross Income</i>	<i>Charge Back</i>	<i>Miles</i>	
<i>Wednesday, May 01, 2002</i>					
H.200	<i>Store Total</i>	\$22.00	\$0.00	0.0	
H.0200	<i>Store Total</i>	\$00.00	\$0.00	0.0	
K.S.V	<i>Store Total</i>	\$44.00	\$0.00	0.0	
	<i>Daily Total</i>	\$100.00	\$0.00	0.0	
<i>Thursday, May 02, 2002</i>					
H.200	<i>Store Total</i>	\$44.00	\$0.00	0.0	
K.S.V	<i>Store Total</i>	\$22.00	\$0.00	0.0	
	<i>Daily Total</i>	\$00.00	\$0.00	0.0	
<i>Friday, May 03, 2002</i>					
H.0200	<i>Store Total</i>	\$22.00	\$0.00	0.0	
K.S.V	<i>Store Total</i>	\$22.00	\$0.00	0.0	
	<i>Daily Total</i>	\$44.00	\$0.00	0.0	
<i>Monday, May 06, 2002</i>					
H.200	<i>Store Total</i>	\$22.00	\$0.00	0.0	
H.0200	<i>Store Total</i>	\$44.00	\$0.00	0.0	
	<i>Daily Total</i>	\$00.00	\$0.00	0.0	
<i>Tuesday, May 07, 2002</i>					
H.200	<i>Store Total</i>	\$44.00	\$0.00	0.0	
H.0200	<i>Store Total</i>	\$22.00	\$0.00	0.0	
	<i>Daily Total</i>	\$00.00	\$0.00	0.0	
<i>Wednesday, May 08, 2002</i>					
H.200	<i>Store Total</i>	\$00.00	\$0.00	0.0	
H.0200	<i>Store Total</i>	\$44.00	\$0.00	0.0	
K.S.V	<i>Store Total</i>	\$22.00	\$0.00	0.0	
	<i>Daily Total</i>	\$100.00	\$0.00	0.0	
<i>Thursday, May 09, 2002</i>					
H.200	<i>Store Total</i>	\$22.00	\$0.00	0.0	
	<i>Daily Total</i>	\$22.00	\$0.00	0.0	
<i>Friday, May 10, 2002</i>					
H.200	<i>Store Total</i>	\$22.00	\$0.00	0.0	
H.0200	<i>Store Total</i>	\$22.00	\$0.00	0.0	
	<i>Daily Total</i>	\$44.00	\$0.00	0.0	
<i>Monday, May 13, 2002</i>					
H.0200	<i>Store Total</i>	\$44.00	\$0.00	0.0	
	<i>Daily Total</i>	\$44.00	\$0.00	0.0	

11.2 Annual Income Report with Monthly Totals

<i>Year Totals</i>		<i>From:</i> 1/1/2002	<i>To:</i> 8/4/2002	<i>Measurer:</i> Harry Santora
		<i>Gross Income</i>	<i>Charge Back</i>	<i>Miles</i>
<i>Schedule Month 1 2002</i>				
H.260	<i>Stave Total</i>	\$946.00	\$0.00	415
H.6336	<i>Stave Total</i>	\$516.00	\$0.00	344
K&Y	<i>Stave Total</i>	\$429.00	\$0.00	210
K&Y North	<i>Stave Total</i>	\$22.00	\$0.00	22
ScottCocca	<i>Stave Total</i>	\$22.00	\$0.00	27
	<i>Month Total</i>	\$2,035.00	\$0.00	1018
<i>Schedule Month 2 2002</i>				
H.213	<i>Stave Total</i>	\$44.00	\$0.00	0
H.234	<i>Stave Total</i>	\$44.00	\$0.00	0
H.260	<i>Stave Total</i>	\$1,166.00	\$0.00	0
H.6336	<i>Stave Total</i>	\$1,342.00	\$36.00	6
K&Y	<i>Stave Total</i>	\$242.00	\$0.00	13
K&Y North	<i>Stave Total</i>	\$22.00	\$0.00	0
	<i>Month Total</i>	\$2,880.00	\$36.00	19
<i>Schedule Month 3 2002</i>				
H.260	<i>Stave Total</i>	\$1,254.00	\$0.00	0
H.6336	<i>Stave Total</i>	\$792.00	\$0.00	0
K&Y	<i>Stave Total</i>	\$396.00	\$0.00	0
K&Y North	<i>Stave Total</i>	\$22.00	\$0.00	0
	<i>Month Total</i>	\$2,464.00	\$0.00	0
<i>Schedule Month 4 2002</i>				
H.234	<i>Stave Total</i>	\$22.00	\$0.00	0
H.260	<i>Stave Total</i>	\$726.00	\$0.00	0
H.6336	<i>Stave Total</i>	\$396.00	\$0.00	0
K&Y	<i>Stave Total</i>	\$131.00	\$0.00	0
K&Y North	<i>Stave Total</i>	\$44.00	\$0.00	0
	<i>Month Total</i>	\$1,325.00	\$0.00	0
<i>Schedule Month 5 2002</i>				
H.234	<i>Stave Total</i>	\$132.00	\$0.00	0
H.260	<i>Stave Total</i>	\$1,096.00	\$0.00	0
H.6336	<i>Stave Total</i>	\$600.00	\$0.00	0
K&Y	<i>Stave Total</i>	\$198.00	\$0.00	0
K&Y North	<i>Stave Total</i>	\$44.00	\$0.00	0
	<i>Month Total</i>	\$1,980.00	\$0.00	0
<i>Schedule Month 6 2002</i>				
H.260	<i>Stave Total</i>	\$362.00	\$0.00	0
H.6336	<i>Stave Total</i>	\$516.00	\$0.00	0
K&Y	<i>Stave Total</i>	\$176.00	\$6.00	0
	<i>Month Total</i>	\$1,144.00	\$6.00	0

Sunday, August 04, 2002

Page 2 of 2

11.3 Business Expense Reports

This form selects the date range and type of business expenses you want. Entered expenses or Charge Backs.

The screenshot shows a Microsoft Access window titled "Microsoft Access - [Business Expense Reports]". The window contains a form with a green textured background. The form has the following elements:

- Expense List**: A button.
- Expense by Catagory**: A button.
- ChargeBack Report**: A button.
- Start Date**: A text box containing "3/1/2004".
- End Date**: A text box containing "3/6/2004".
- Measurer**: A dropdown menu with "John Gandy" selected.
- A small icon button at the bottom center.
- Copyright text: "Copyright 1999-2004 Space Coast Computers, Inc." at the bottom center.

The status bar at the bottom of the window shows "Form View" on the left and "NUM" on the right.

11.4 Charge Backs

11.4.1 Entry and Status Form

This form is used to enter and track Charge Backs. The charge back amount when entered on this form against a PO, it will show up on the PO form automatically.

The screenshot shows a Microsoft Access form titled "Installed Sales ChargeBack" within a window named "Microsoft Access - [ChargeBacks Query]". The form contains the following fields and controls:

- Chargeback No:** 121234
- Store No:** Home Depot Merritt Isl. (dropdown)
- Issue Date:** 3/1/2004
- Original PO:** 60441749
- Measurer:** Glenn Seaton (dropdown)
- Description Materials:** a
- Description Labor:** b
- Cost:** \$75.00
- Balance Due:** \$45.00
- Reason:** test (text area)
- Payments Table:**

	Date	Payment	Check	Description
▶	3/1/2004	\$30.00	12	
*	3/6/2004	\$0.00	0	

Navigation buttons: Next, Previous, Add, and a button with a plus sign.

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Record: 1 of 25
Form View

11.4.2 Charge Back Payment List

This form allows a single payment to be subtracted against several Chargeback numbers on a single screen.

Microsoft Access - [ChargeBacks Query]

File Edit View Insert Format Records Tools Window Help

Charge Back Payments List

Payments	ChargebackNo	Date	Payment	Check	Description
	170636	7/20/2003	\$120.00	7251	125.00 of 200.00
	170636	7/21/2003	\$53.00	7200	53.00 of 253.00
	171943	7/21/2003	\$50.00	7200	50.00 of 50.00 Done
	170636	7/28/2003	\$75.00	7320	75.00 of 75.00 Done
	176739	8/5/2003	\$100.00	7372	100.00 of 688.00
	176739	8/11/2003	\$100.00	7434	100.00 of 588.00
	176739	8/17/2003	\$100.00	7478	100.00 of 488.00
	12123	2/28/2004	\$5.00	12	
	12123	2/28/2004	\$20.00	22	
	159965	2/29/2004	\$50.00	0	
	12123	2/29/2004	\$5.00	0	
	121234	3/1/2004	\$30.00	12	
	32123	3/3/2004	\$10.00	0	
	12123	3/3/2004	\$30.00	123	
	176739	3/3/2004	\$50.00	321	

Record: 53 of 53

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Record: 1 of 53

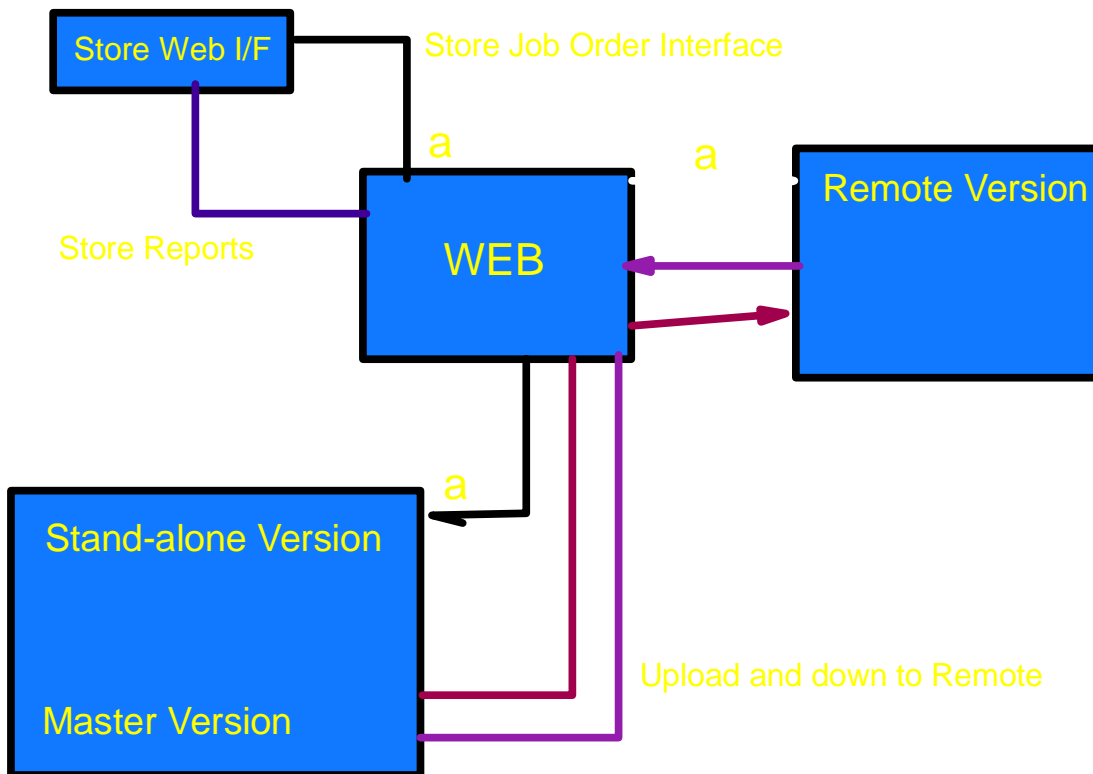
Form View

Appendix A

Technical Data Flow Diagrams

Store Web Site Data Flow

A PO can be entered several ways. A new PO can be entered directly into any version of the program using the PO from, or from your special business web site for that store. The special business web site lets you store customer enter a new PO online. This also allows the store to be able to track posted Purchase Orders, by which sales person, and if it has been downloaded by the measurer. It can be downloaded to any version of the program.



WEB Store Interface (I/F)

The WEB Store Interface can provide a option for stores to enter PO/Work Orders on-line and eliminate faxing. Unlike the fax option, the on-line option provides feedback to the store that the job was received.

The store is provided two levels of control the Sales person and the Manager. The Sales person can only enter and edit POs for that individual and can not run reports. The Manager can enter POs, add other Sales or Managers to the user list, run reports on posted jobs and edit posted jobs.

Concept: User Level Access Control

