

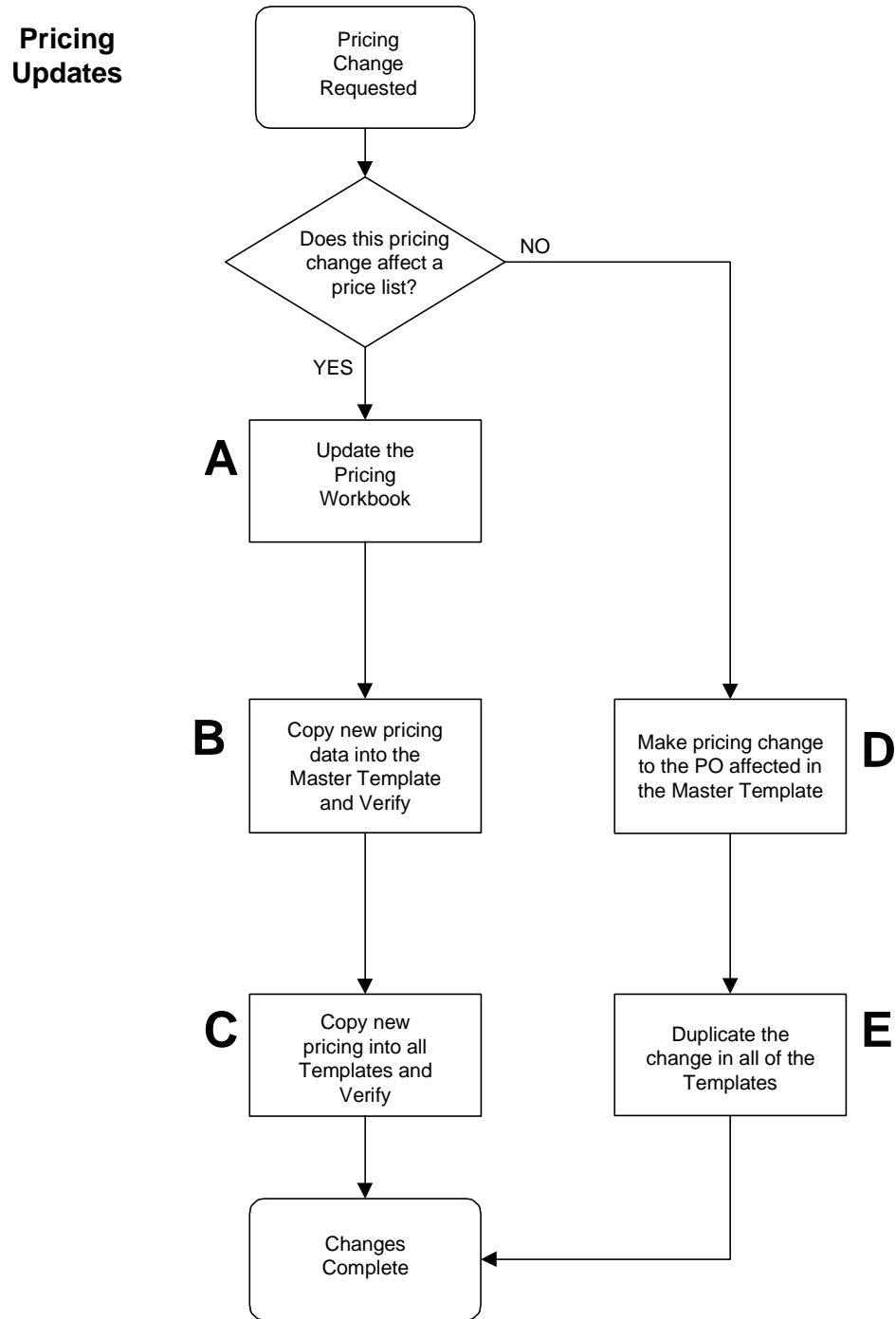
1.0 OVERVIEW

The purpose of this procedure is to provide the steps required to update pricing in the master template and the model templates.

Attached to this procedure in section 4, are reports that list all range names and how pricing changes affect purchase orders. Refer to these lists when you are uncertain of how changes will impact the templates.

2.0 FLOW CHART

This flow chart describes the work process



3.0 PROCEDURE



A. Update the Pricing Workbook

A.1 The pricing workbook is an Excel file located in the Master Template folder on the server. Load the workbook into Excel and proceed to the next step. (G:\PO-Templates\Master Template\PricingData.xls)

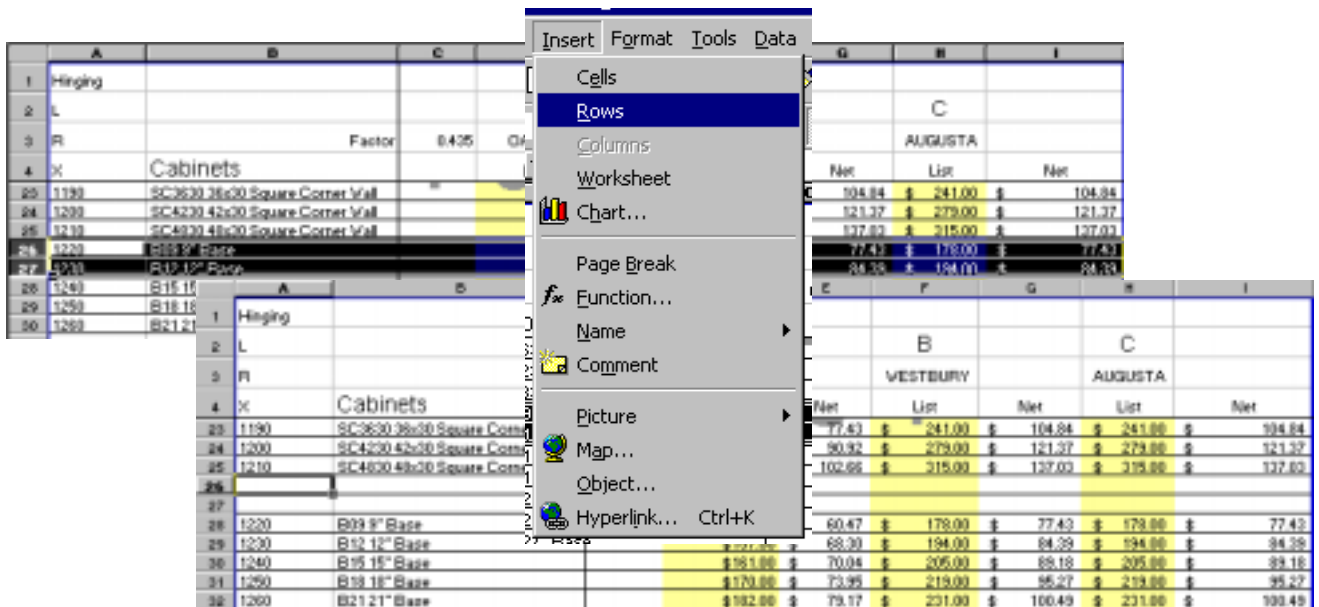
A.2 This file contains the following work sheets:



A.3 Choose the workbook tab that contains the data you need to update. For our example in this procedure, we will use the "Cabinet Pricing" tab as shown above. At this point, it is a good idea to have a printout of the list you will be working with.

A.4 This list is setup using a Keys No. as the control column / field. When inserting items that we want to appear in an appropriate location, we want to use the insert row command. For this example, we are going to insert two new items.

A.5 First we select the rows where we want to insert our new items. Then from the menu we select [Insert|Rows]. This will insert the new rows as shown below.



NOTE: The advantage of using the insert row command, is that the software will automatically adjust the range name applied to this worksheet. When adding items to the bottom of the list we have to adjust the range name to accommodate the items added to the bottom of the list. We will cover this process later in this procedure.

A.6 Now that we have new rows in the price list, we can begin to input the new items. When inputting items, we only input the following: Keys No., Description, and List Price. We also copy the formula from the net column into the new row. The net price will be calculated automatically based upon the factor located at the top of the price list. See Example below.

	A	B	C	D	E	F	G
1	Hinging						
	L		A		B		C
	R	Factor	0.435	OAKLAND		WESTBURY	AUGUSTA
4	X	Cabinets		List	Net	List	Net
23	1190	SC3630 36x30 Square Corner Wall		\$178.00	\$ 77.43	241.00	\$ 104.84
	1200	SC4230 42x30 Square Corner Wall		\$209.00	\$ 92.22	279.00	\$ 121.37
25	1210	SC4830 48x30 Square Corner Wall		\$236.00	\$ 102.66	315.00	\$ 137.03
26	1212	Example Item 1		\$500.00	\$ 217.50		
27	1213						
28	1220	B09 9" Base		\$139.00	\$ 60.47	178.00	\$ 81.18
29	1230	B12 12" Base		\$157.00	\$ 68.30	194.00	\$ 85.14
30	1240	B15 15" Base		\$161.00	\$ 70.04	205.00	\$ 89.22
31	1250	B18 18" Base		\$170.00	\$ 73.95	219.00	\$ 95.12
32	1260	B21 21" Base		\$182.00	\$ 79.17	231.00	\$ 100.49

NOTE: Not all price lists have a Factor or a list / net price. In the case of Lumber for example, the only price input into the list is the price paid by Keys and Schuler Homes. It is not necessary to copy any formulas.

NOTE: Changing the Net Factor value will re-calculate every price within the price list.

A.7 When finished adding these new items save the file. If you have to add additional items to the bottom of the list, move on to step A.8. If you do not need to add any other items, move on to step B.1.

- A.8 These next series of step will cover the process of adding items to the bottom of the list and extending the appropriate name range to capture the new items.
- A.9 The first step when adding items to the bottom of a list is to extend the print area. This is achieved by placing your mouse over the blue page break line and dragging the line down across the number of rows you need.

	A	B	C	D	E
1	Hinging				
2	L				
3	R		Factor	0.435	OAKL
4	X	Cabinets			Net
74	5040	Brass Knobs		1.86	\$ 0.81
75	5050	Installation per Box		40.54	\$ 17.63
76	5060	Backsplash LF			\$ -
77	5070	Countertop Edge LF			\$ -
78	5080				\$ -
79	5090				\$ -
80	5100				\$ -
81					
82					
83					

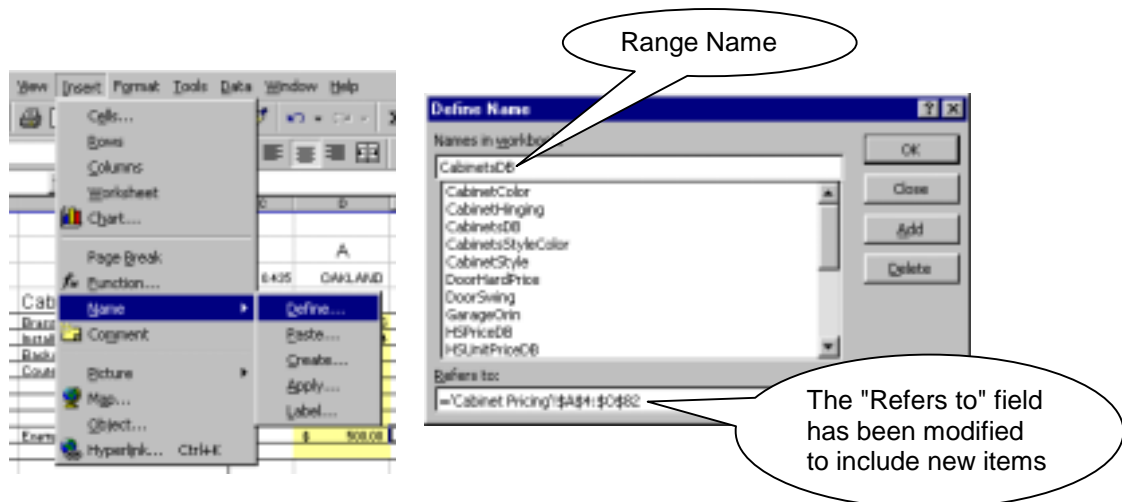
- A.10 The next step is to format the rows at the bottom to be the same as the rows above. We accomplish this by using the paste special command. First, highlight the last row that is already formatted. Next, on the menu select [Edit|Copy] and then select the two rows at the bottom. Then use the [Edit|Paste Special] command to paste only the format data. See below for examples.

A.11 Now that we have added the rows and formatted them we can begin to input the new item data. Simply type in the Keys No., item description, and list prices. See below.

	A	B	C	D	E
1	Hinging				
2	L			A	
3	R	Factor	0.435	OAKLAND	
4	X	Cabinets		List	Net
74	5040	Brass Knobs		1.86	\$ 0.81
75	5050	Installation per Box		40.54	\$ 17.63
76	5060	Backsplash LF			\$ -
77	5070	Countertop Edge LF			\$ -
78	5080				\$ -
79	5090				\$ -
80	5100				\$ -
81	5110	Example New Item		\$ 500.00	\$ 217.50
82					
83					

A.12 To complete the entry of the new item we also have to copy the formula for calculating the net price. See step A.6 above for reference.

A.13 To complete the update process, we have to now extend the range of the price list so that we can use the new items on the purchase order. To accomplish this, from the menu select [Insert|Name|Define]. This will bring up a window that lists the range names for the data. Select the appropriate range name and extend the "refers to" field to include the new items at the bottom of the list. See below.

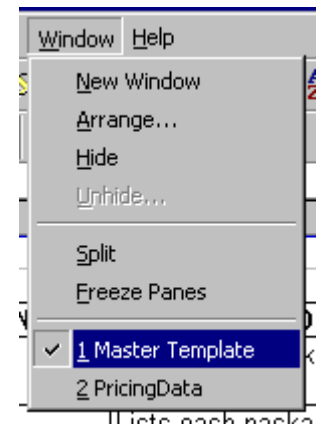


- A.14 This completes the pricing update process for the price book. Move on to step B to update the Master Template.

B. Copying Pricing Data into Master Template and Verify

B

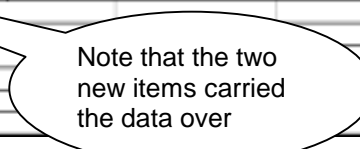
- B.1 To copy the new pricing data into the Master Template, we have to have both files open at the same time in Excel. To switch between files in Excel, use the |Window| command on the menu and you will see a list of open files at the bottom of the menu.



- B.2 Now that we have the two files open we need to work with, we have to select the area we want to copy in the PricingData.xls file. We only want to select the data that contains the actual pricing information. It is not necessary to copy any other data. For the cabinet-pricing file we are working with, this would be cells A5 to O82. After selecting the area to copy, use the |Edit|Copy| function on the Excel menu.
- B.3 Next, using the window command, select the Master Template file and place the cursor on cell A5 in the cabinet pricing worksheet in the Master Template. Use the |Edit|Paste| command on the menu to paste the copied updated pricing into the Master Template.
- B.4 Now that we have the updated data in the Master Template, we have to adjust the range name with in the Master Template just as we did in the pricing data file. Refer to step A.13 above of this procedure.
- B.5 Save the file and move on to step B.6 to verify that the data is available to the appropriate purchase order.

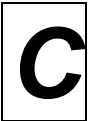
B.6 To verify for our example we will use the cabinets purchase order. Simply input the number of the new item added to the pricing list into the appropriate cell on the purchase order and verify that the correct information is being carried over to the purchase order.

1470	1	VSB42 42"Vanity Sink Base			\$ 110.06	\$ 110.06
5030	2	Corbels			\$ 6.36	\$ 12.72
5010	5	Decking (2"x8")			\$ 18.57	\$ 92.87
					\$ -	\$ -
1212	1	Example Item 1			\$ 217.50	\$ 217.50
5110		Example New Item			\$ 217.50	\$ 217.50
					\$ -	\$ -
					\$ -	\$ -
					\$ -	\$ -
					\$ -	\$ -
					\$ -	\$ -



B.7 Repeat the steps as necessary depending upon the number of tables being updated. This completes the process for updating the master template pricing information.

C. Copying Pricing Data into all Templates and Verify



C.1 Repeat steps B.1 through B.6 for templates as required.

C.2 For subdivision specific pricing updating, see procedure PR-02.



D. Changing Manual Purchase Orders

D.1 Manual purchase orders are defined as purchase orders that are not pulling any data from a table. All pricing data is contained on the purchase order itself. Refer to the "Pricing Source and Update Frequency" table attached to this procedure. For discussion purposes we will use the "Erosion Control" purchase order. See below for detail.

 2636 NW 26th Ave., #210 Portland, OR - 97218 503.223.8900 FAX 503.223.1446		Project Manager: Joe Smith	Keys and Schuler Phone No.s	
		Sr. Project Manager: Jim Jones	Radio Alert: 503.555.1212	
		Subdivision - Job No.: Orchard Heights - 126	Site Phone: 503.555.1269	
		Address: 1223 Excellent Times Rd. Albany, OR 92765	Site Fax: 503.555.1270	
Erosion Control		P.O. NO.: 260H00-03	Lot: 28	
Gettysberg 1498K-000		Date Issued: 23-Sep-99	Page 1 / 1	
Sub Contractor / Vendor: B & M Construction Inc. 19400 SW Blaine St Aloha, OR 97006		Phone: (503) 642-3446	Fax: (503) 642-3446	
Quantity	Description	Notes	Multiplier	Total
40	Silt Fence		\$ 2.00	\$ 80.00
10	30" Bio Bags Installed		\$ 4.50	\$ 45.00
0	60" Bio Bags Installed		\$ 5.50	\$ -
0	Silt fence Repair Per Hr		\$ 27.50	\$ -
0	2"x2" Posts Replaced		\$ 1.50	\$ -
10	General Labor Per Hr		\$ 27.50	\$ 275.00
8	Straw Bales Spread(12"x12' approx)		\$ 10.00	\$ 80.00
Schuler Homes of Oregon DBA Keys and Schuler Homes Cost Code: 6045			Sub Total:	\$ 490.00
NOTE: Refer to your contract for terms and conditions.			Tax:	\$ -
			Total:	\$ 490.00

All pricing in the Multiplier column is hard coded and manually updated.

D.2 To change a price on a purchase order like this one, all we have to do is type in a new number that matches the quoted or desired price. See below for detail.

Quantity	Description	Notes	Multiplier	Total
40	Silt Fence		\$ 4.00	\$ 160.00
10	30" Bio Bags Installed		\$ 9.00	\$ 90.00
0	60" Bio Bags Installed		\$ 5.50	\$ -
0	Silt fence Repair Per Hr		\$ 27.50	\$ -
0	2"x2" Posts Replaced		\$ 1.50	\$ -
10	General Labor Per Hr		\$ 54.00	\$ 540.00
8	Straw Bales Spread(12"x12' approx)		\$ 20.00	\$ 160.00
Schuler Homes of Oregon DBA Keys and Schuler Homes Cost Code: 6045			Sub Total:	\$ 950.00
NOTE: Refer to your contract for terms and conditions.			Tax:	\$ -
			Total:	\$ 950.00

D.3 Notice that all we had to do is input the new price into the appropriate cell in the multiplier column to update the pricing.

E. Changing Manual Purchase Orders in Templates



E.1 Repeat steps D.1 and D.2 for all templates as required.

4.0 EXAMPLES

- EX-01 Pricing Source and Update Frequency table, 2 pages
- EX-02 Purchase Order System Range Name Listing, 4 pages
- EX-03 Printouts of all pricing lists. (Not Shown)
- EX-04 Printouts from Microsoft Excel help file on the subject of range names. (See Excel Help)

Pricing Source and Update Frequency

PO Sheet Name	PO No.	Pricing Source	Update Type	Pricing Sheet	Range Name	Update Frequency
Survey	2	Purchase Order	Manual			Lot Specific
Erosion Control	3	Purchase Order	Manual			Lot Specific
Excavation & Utilities	4	Purchase Order	Manual			Lot Specific
Foundation Concrete	5	Purchase Order	Manual			Called in
Flat Work	6	Purchase Order	Manual			Lot Specific
Concrete Pump	7	Purchase Order	Manual			Called in
Foundation Labor	8	Purchase Order	Manual			Contract
Gravel	9	Purchase Order	Manual			Called in
Plumbing A	10	Purchase Order	Manual			Yearly
Plumbing B	10	Purchase Order	Manual			Yearly
Plumbing C	10	Purchase Order	Manual			Yearly
Plumbing D	10	Purchase Order	Manual			Yearly
Plumbing E	10	Purchase Order	Manual			Yearly
Plumbing Extras	11	Purchase Order	Manual			Yearly
Windows A	15	Windows Database	Table	Window Pricing	WindowDB	Yearly
Windows B	15	Windows Database	Table	Window Pricing	WindowDB	Yearly
Windows C	15	Windows Database	Table	Window Pricing	WindowDB	Yearly
Windows D	15	Windows Database	Table	Window Pricing	WindowDB	Yearly
Windows E	15	Windows Database	Table	Window Pricing	WindowDB	Yearly
Windows F	15	Windows Database	Table	Window Pricing	WindowDB	Yearly
Panel Framing	22	Lumber Database	Table	Lumber Pricing	LumberDB	Quarterly
Stick Framing Mat	23	Lumber Database	Table	Lumber Pricing	LumberDB	Quarterly
Framing Labor	24	Purchase Order	Manual			Contract
Roofing Material	25	Roofing Database	Table	RoofingPricing	RoofPriceDB	Yearly
Roofing Labor	26	Purchase Order	Manual			Contract
Gutters	27	Purchase Order	Manual			Yearly
Finish Pack A	32	Door Hardware Database	Table	Door Hard Price	DoorHardPrice	Yearly
Finish Pack B	32	Door Hardware Database	Table	Door Hard Price	DoorHardPrice	Yearly
Finish Pack C	32	Door Hardware Database	Table	Door Hard Price	DoorHardPrice	Yearly
Finish Pack D	32	Door Hardware Database	Table	Door Hard Price	DoorHardPrice	Yearly
Finish Pack E	32	Door Hardware Database	Table	Door Hard Price	DoorHardPrice	Yearly
Finish Labor	33	Purchase Order	Manual			Contract
Garage Doors	35	Purchase Order	Manual			Yearly
Sheetrock	37	Purchase Order	Manual			Quarterly
Painting Interior	40	Purchase Order	Manual			Contract
Painting Exterior	41	Purchase Order	Manual			Contract
HVAC	45	Purchase Order	Manual			Yearly
Fireplace	46	Purchase Order	Manual			Yearly
Electrical A	50	Purchase Order	Manual			Yearly
Electrical B	50	Purchase Order	Manual			Yearly
Electrical Extras	51	Purchase Order	Manual			Yearly
Lighting Package	55	Lighting Database	Table	LightingPricing	LightPriceDB	Yearly
Insulation	60	Purchase Order	Manual			Yearly
Cabinets A	65	Cabinets Database	Table	Cabinet Pricing	CabinetsDB	Yearly
Cabinets B	65	Cabinets Database	Table	Cabinet Pricing	CabinetsDB	Yearly
Cabinets C	65	Cabinets Database	Table	Cabinet Pricing	CabinetsDB	Yearly
Cabinets D	65	Cabinets Database	Table	Cabinet Pricing	CabinetsDB	Yearly

PO Sheet Name	PO No.	Pricing Source	Update Type	Pricing Sheet	Range Name	Update Frequency
Cabinets E	65	Cabinets Database	Table	Cabinet Pricing	CabinetsDB	Yearly
Cabinets F	65	Cabinets Database	Table	Cabinet Pricing	CabinetsDB	Yearly
Hard Surfaces	70	Hard Surfaces Database	Table	HardSurfacePrices	HSPriceDB	Yearly
Bath Packs	75	Purchase Order	Manual			Yearly
Closet Packs	80	Purchase Order	Manual			Yearly
Landscaping	100	Purchase Order	Manual			Lot Specific
Appliances	90	Purchase Order	Manual			Yearly
Siding Labor	93	Purchase Order	Manual			Contract
Siding Mat	94	Lumber Database	Table	Lumber Pricing	LumberDB	Quarterly
Brick	95	Purchase Order	Manual			Yearly
Stone	96	Purchase Order	Manual			Yearly
Day Labor	97	Purchase Order	Manual			Contract
Site Cleaning	98	Purchase Order	Manual			Contract
Interior Cleaning	99	Purchase Order	Manual			Contract
Deck	28	Lumber Database	Table	Lumber Pricing	LumberDB	Quarterly
Blank	B1 to B20	No Pricing - Input by user specific to order scope	NA	NA	NA	NA
TheftDamage	V1 to V3 and D1 to D3	No Pricing - Input by user specific to order scope	NA	NA	NA	NA

Purchase Order System Range Name Listing

Range Name	Range Area	Range Description
CabinetColor	=Cabinet Pricing!\$R\$2:\$R\$9	Pick List for Cabinet Color. Will change only if wider range of colors are offered to the buyer.
CabinetHinging	=Cabinet Pricing!\$A\$2:\$A\$4	Pick list for Cabinet hing orientation. This will not change.
CabinetsDB	=Cabinet Pricing!\$A\$4:\$O\$80	Cabinets pricing database. This range is subject to change depending upon pricing and item changes.
CabinetsStyleColor	=Cabinet Pricing!\$T\$1:\$U\$49	This is a range that is used in formulas for cabinets. This range should not change unless the options for cabinets change.
CabinetStyle	=Cabinet Pricing!\$Q\$2:\$Q\$7	Pick List for Cabinet Style. Will change only if wider range of styles are offered to the buyer.
Contacts	=Contacts!\$A\$1:\$P\$441	Contact Database range. This range is subject to change in relation to the changes to the number of validated suppliers and vendors.
DoorHardPrice	=Door Hard Price!\$A\$3:\$I\$284	Door, Hardware, and Railing pricing database. This range is subject to change depending upon pricing and item changes.
DoorSwing	=Door Hard Price!\$P\$1:\$P\$3	Pick list for Door hing orientation. This will not change.
FPackADoorCount	=Finish Pack A!\$B\$19:\$B\$34	This range resides on the Finish Package A purchase order and is used as the basis for a quantity on the Finish Labor purchase orders. This range will not change.
FPackADoorType	=Finish Pack A!\$E\$19:\$E\$34	This range resides on the Finish Package A purchase order and is used as the basis for a quantity on the Finish Labor purchase orders. This range will not change.
FPackARailQty	=Finish Pack A!\$B\$63:\$B\$78	This range resides on the Finish Package A purchase order and is used as the basis for a quantity on the Finish Labor purchase orders. This range will not change.
FPackARailType	=Finish Pack A!\$H\$63:\$H\$78	This range resides on the Finish Package A purchase order and is used as the basis for a quantity on the Finish Labor purchase orders. This range will not change.
FPackBDoorCount	=Finish Pack B!\$B\$19:\$B\$34	This range resides on the Finish Package B purchase order and is used as the basis for a quantity on the Finish Labor purchase orders. This range will not change.

Purchase Order System Range Name Listing

Range Name	Range Area	Range Description
FPackBDoorType	=Finish Pack B!\$E\$19:\$E\$34	This range resides on the Finish Package B purchase order and is used as the basis for a quantity on the Finish Labor purchase orders. This range will not change.
FPackBRailQty	=Finish Pack B!\$B\$63:\$B\$78	This range resides on the Finish Package B purchase order and is used as the basis for a quantity on the Finish Labor purchase orders. This range will not change.
FPackBRailType	=Finish Pack B!\$H\$63:\$H\$78	This range resides on the Finish Package B purchase order and is used as the basis for a quantity on the Finish Labor purchase orders. This range will not change.
FPackCDoorCount	=Finish Pack C!\$B\$19:\$B\$34	This range resides on the Finish Package C purchase order and is used as the basis for a quantity on the Finish Labor purchase orders. This range will not change.
FPackCDoorType	=Finish Pack C!\$E\$19:\$E\$34	This range resides on the Finish Package C purchase order and is used as the basis for a quantity on the Finish Labor purchase orders. This range will not change.
FPackCRailQty	=Finish Pack C!\$B\$63:\$B\$78	This range resides on the Finish Package C purchase order and is used as the basis for a quantity on the Finish Labor purchase orders. This range will not change.
FPackCRailType	=Finish Pack C!\$H\$63:\$H\$78	This range resides on the Finish Package C purchase order and is used as the basis for a quantity on the Finish Labor purchase orders. This range will not change.
FPackDDoorCount	=Finish Pack D!\$B\$19:\$B\$34	This range resides on the Finish Package D purchase order and is used as the basis for a quantity on the Finish Labor purchase orders. This range will not change.
FPackDDoorType	=Finish Pack D!\$E\$19:\$E\$34	This range resides on the Finish Package D purchase order and is used as the basis for a quantity on the Finish Labor purchase orders. This range will not change.
FPackDRailQty	=Finish Pack D!\$B\$63:\$B\$78	This range resides on the Finish Package D purchase order and is used as the basis for a quantity on the Finish Labor purchase orders. This range will not change.

Purchase Order System Range Name Listing

Range Name	Range Area	Range Description
FPackDRailType	=Finish Pack D!\$H\$63:\$H\$78	This range resides on the Finish Package D purchase order and is used as the basis for a quantity on the Finish Labor purchase orders. This range will not change.
FPackEDoorCount	=Finish Pack E!\$B\$19:\$B\$34	This range resides on the Finish Package E purchase order and is used as the basis for a quantity on the Finish Labor purchase orders. This range will not change.
FPackEDoorType	=Finish Pack E!\$E\$19:\$E\$34	This range resides on the Finish Package E purchase order and is used as the basis for a quantity on the Finish Labor purchase orders. This range will not change.
FPackERailQty	=Finish Pack E!\$B\$63:\$B\$78	This range resides on the Finish Package E purchase order and is used as the basis for a quantity on the Finish Labor purchase orders. This range will not change.
FPackERailType	=Finish Pack E!\$H\$63:\$H\$78	This range resides on the Finish Package E purchase order and is used as the basis for a quantity on the Finish Labor purchase orders. This range will not change.
GarageOrin	=Door Hard Price!\$Q\$1:\$Q\$2	Garage Door Orientation. This range is used to pick the Garage Right or Garage Left for purchase orders that are affected by the orientation of the garage.
HSPriceDB	=HardSurfacePrices!\$A\$21:\$G\$363	Hard Surfaces / Carpeting pricing database. This range is subject to change depending upon pricing and item changes. This range is also Trinity specific.
HSUnitPriceDB	=HardSurfacePrices!\$B\$8:\$C\$15	Hard Surfaces / Carpeting unit pricing located at the top of the pricing worksheet. This range should not change unless the vendor changes. This range is used to control unit pricing for the database.
HSUpgradesDB	=HardSurfaceUp!\$A\$4:\$B\$47	Hard Surfaces / Carpeting upgrade pricing database. This range is also Trinity specific and should not change
InsulateSF	=Insulation!\$I\$18:\$I\$113	This range is embedded into the insulation purchase order and is used to total the square feet quantities at the bottom of the purchase order. This range will not change unless the system changes.

Purchase Order System Range Name Listing

Range Name	Range Area	Range Description
InsulateSFW	=Insulation!\$I\$184:\$I\$278	This range is embedded into the insulation purchase order for Washington and is used to total the square feet quantities at the bottom of the purchase order. This range will not change unless the system changes.
InsulateType	=Insulation!\$G\$18:\$G\$113	This range is embedded into the insulation purchase order and is used to total the square feet quantities at the bottom of the purchase order. This range will not change unless the system changes.
InsulateTypeW	=Insulation!\$G\$184:\$G\$278	This range is embedded into the insulation purchase order for Washington and is used to total the square feet quantities at the bottom of the purchase order. This range will not change unless the system changes.
LightPriceDB	=LightingPricing!\$B\$3:\$D\$94	Lighting pricing database. This range is subject to change depending upon pricing and item changes. This range is also Builders Lighting specific.
LumberDB	=Lumber Pricing!\$A\$1:\$F\$341	Lighting pricing database. This range is subject to change depending upon pricing and item changes. This range is also Builders Lighting specific.
PackList	=MainMenu!\$M\$1:\$M\$7	Pick list for packages. Will not change unless KSH starts to offer "G" packages or higher.
RoofColor	=Roofing Material!\$L\$1:\$L\$3	Pick list for selecting the roof color. Will not change unless more colors are offered.
RoofPriceDB	=RoofingPricing!\$B\$6:\$D\$29	Roofing pricing database. This range is subject to change depending upon pricing and item changes.
WindowDB	=Window Pricing!\$A\$7:\$T\$323	Windows pricing database. This range is subject to change depending upon pricing and item changes. This range is also Milguard specific.
WindowGlass	=Window Pricing!\$Z\$2:\$Z\$3	Pick list for window glass type. This range is currently not in use, however could be needed in the future.
WindowGrid	=Window Pricing!\$Y\$2:\$Y\$5	Pick list for window grid type. This range should not change unless more grid types are offered.
WindowState	=Window Pricing!\$X\$2:\$X\$3	This range is used in the windows purchase order formulas for selecting the correct window price that is state specific.
YESorNO	=c!\$L\$1:\$L\$2	Pick list used in several areas for YES or NO issues.

1.0 OVERVIEW

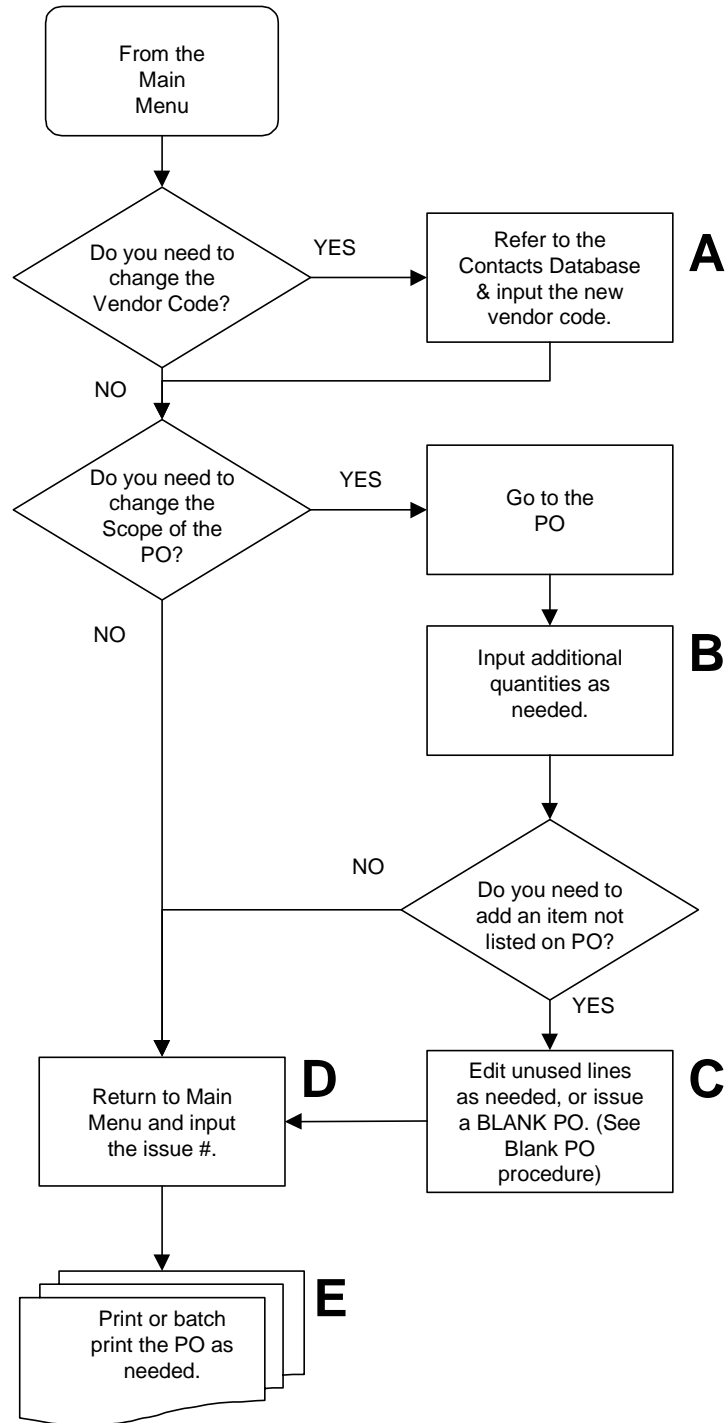
The purpose of this procedure is to explain the use of the Survey purchase order and extras.

Refer to section 1 (Setup) of this manual for any questions concerning the content of a purchase order in general.

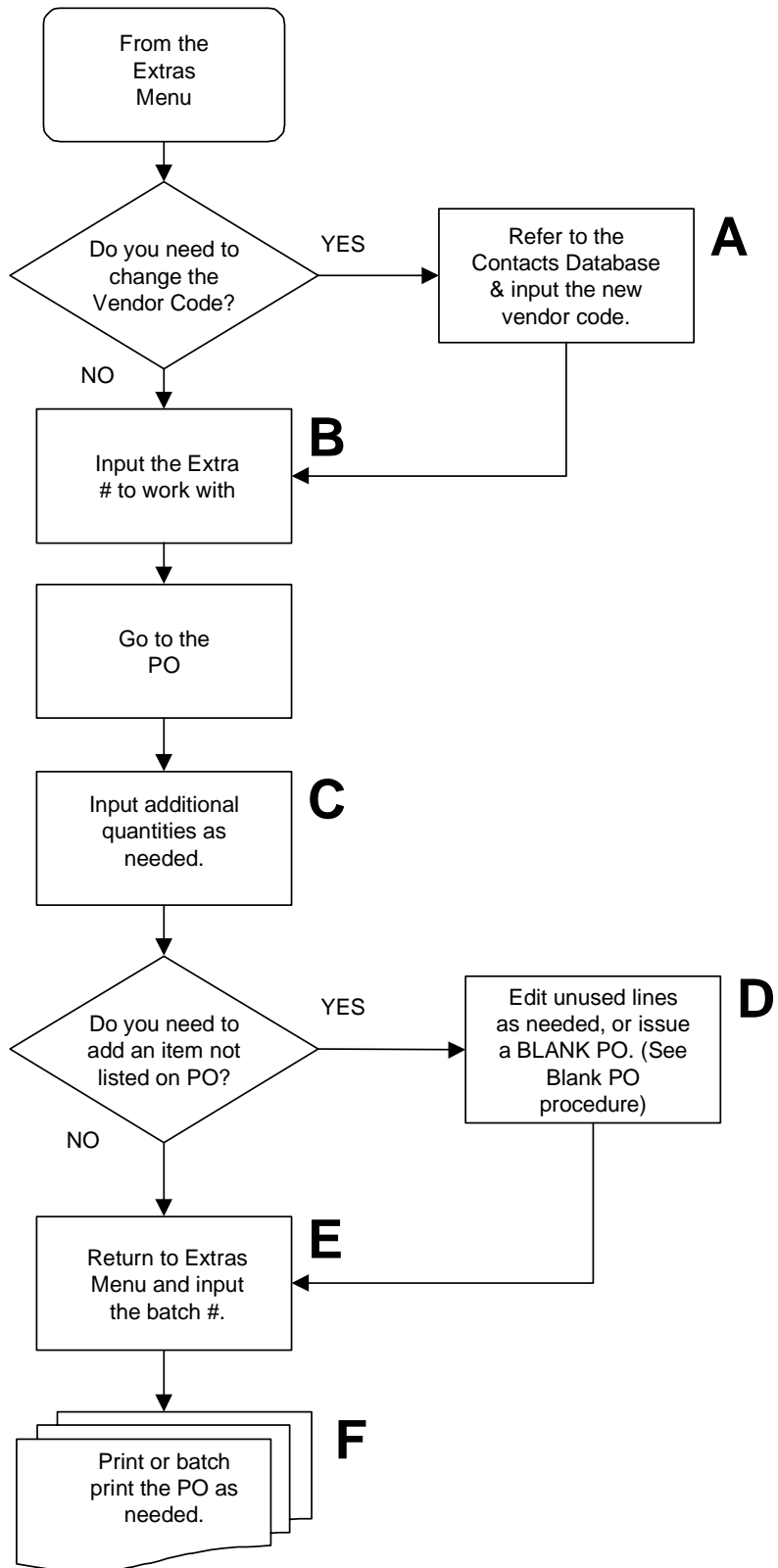
2.0 FLOW CHART

These flow charts describe the work processes.

Survey Base Scope PO



Survey Extra
Scope PO



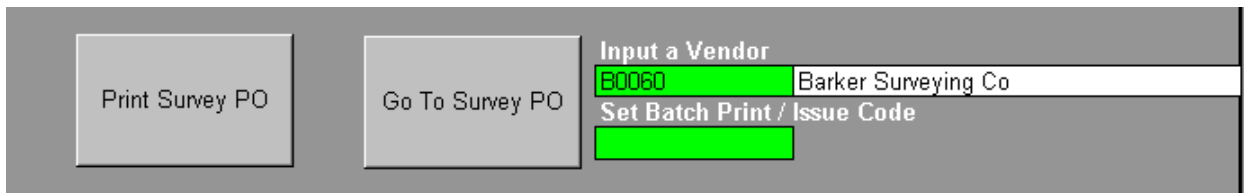
3.0 PROCEDURE



BASE SCOPE

A. From Main Menu

- A.1 From the Main Menu, find the buttons for the Survey PO. To the right of the buttons, there is a field to input the vendor code.




- A.2 Refer to the Contacts Database procedure in Section 8 Volume 2 of this manual.
- A.3 Input the code of choice in the field and a new vendor will be chosen from the contact database. A vendor code must be used in order for the PO to be complete.

B. Additional Quantities

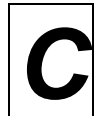


- B.1 From the Main Menu, click on the "Go To Survey PO" button.
- B.2 On the PO, input the quantities as needed to complete the scope required. Be sure to use the note field to clarify if needed. See picture below. Note the added quantities and clarification, and compare it to the attached example for this procedure.
- B.3 When finished with added quantities, proceed to step C or D.

 2636 NW 26th AVE., #219 Portland, OR 97218 503.223.6999 FAX 503.223.1446	Project Manager: Jan Smith	Keys and Schuler Phone No.s		
	Sr. Project Manager: Jim Jones	Radio Alert: 503.555.1212	Radio Alert: 503.555.1212	
	Subdivision - Job No.: Orchard Heights - 126	Site Phone: 503.555.1269	Site Fax: 503.555.1270	
	Address: 1223 Excellent Times Rd.	Tax: N/A	Lot: 26	
	Albany, OR 97765			
Survey	P.O. NO.: 260189-02			
Gettysburg 1456K-000	Date Issued: July 22, 1999	Page 1 / 1		
Sub Contractor / Vendor: Barker Surveying Co		Phone: (503) 588-8888		
2635 25th Street SE		Fax: (503) 588-8884		
Salem, OR 97302				
Quantity	Description	Notes	Multiplier	Total
0	Hub & Tack		\$ 150.00	\$ -
1	Pin Footings & Foundation Survey		\$ 325.00	\$ 325.00
1	Foundation Survey	Added as required by City.	\$ 150.00	\$ 150.00
0	Mark Property Corners		\$ 100.00	\$ -
Schuler Homes of Oregon DBA Keys and Schuler Homes			Sub Total:	\$ 675.00
Cost Code: 7005			Tax:	\$ -
NOTE: Refer to your contract for terms and conditions.			Total:	\$ 675.00

Return to
MAIN MENU

C. Modifying Scope



- C.1 If the current items listed on the PO do not match the scope of work needed, you can simply edit the lines as needed or input data on any unused lines.
- C.2 Note on the picture below that we have changed the description of the last line to read what we need. We then added a note for clarification and input the appropriate price.
- C.3 When finished, click on the "Return to Main Menu" button to continue and proceed to step D.

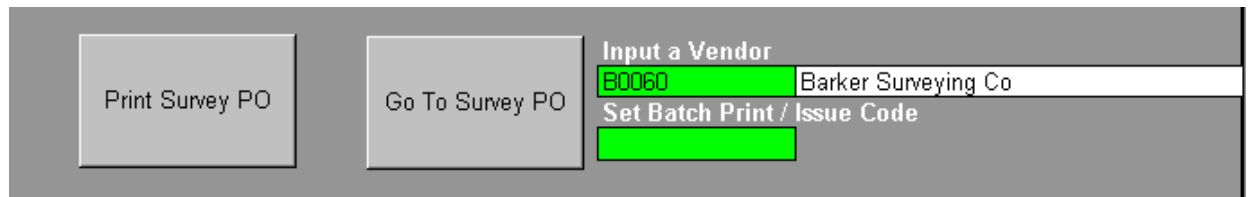
Quantity	Description	Notes	Multiplier	Total
0	Hub & Tack		\$ 150.00	\$ -
1	Pin Footings & Foundation Survey		\$ 325.00	\$ 325.00
1	Foundation Survey	Added as required by City.	\$ 150.00	\$ 150.00
1	Mark Cut and Fill	Severe Slope at lot.	\$ 200.00	\$ 200.00
Schuler Homes of Oregon DBA Keys and Schuler Homes			Sub Total:	\$ 675.00
Cost Code: 7005			Tax:	\$ -
NOTE: Refer to your contract for terms and conditions.			Total:	\$ 675.00

Return to
MAIN MENU

D. Issue the PO

D

- D.1 After returning to the main menu, the PO has to be issued before printing so that the cost is properly carried over to the cost data table.
- D.2 Simply input a number into the “Set Batch Print / Issue Code” field as shown below.

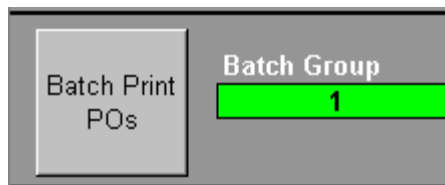


- D.3 When finished, proceed to step E of this procedure.

E. Print the PO / Batch Print

E

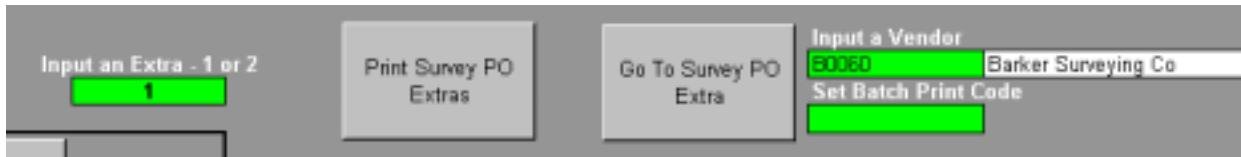
- E.1 After issuing the PO, you can now print this single PO or batch print a group of POs.
- E.2 To print this PO by itself, simple click on the “Print Survey PO” button.
- E.3 To batch print this PO with others, simply input a code equal to the batch code of the other orders. Then click on the “Batch Print POs” button shown below. The batch print button is located at the upper left of the main menu.



EXTRA SCOPE

A. From Extras Menu

- A.1 From the Extras Menu, find the buttons for the Extra Survey POs. To the right of the buttons, there is a field for inputting the vendor code.



The screenshot shows a software interface with several buttons and input fields. On the left, there is a button labeled 'Input an Extra - 1 or 2' with a green box containing the number '1'. In the center, there are two buttons: 'Print Survey PO Extras' and 'Go To Survey PO Extra'. On the right, there is a section titled 'Input a Vendor' with a green box containing the code 'E0060' and a text field containing 'Barker Surveying Co'. Below this, there is a button labeled 'Set Batch Print Code'.

- A.2 Refer to the Contacts Database procedure in Section 8 Volume 2 of this manual.
- A.3 Input the code of choice in the field and a new vendor will be chosen from the contact database. A vendor code must be used in order for the PO to be complete.

B. Selecting Extra Number

B

- B.1 From the Extra Menu, input the number of the extra you want to work with in the field to the left of the buttons as shown above.
- B.2 Once you have input one of the valid extra numbers, click on the “Go To” button.
- B.3 Proceed to step C.


NOTE: If all of the extras have been used, you have to issue a blank PO for any other extras. Refer to the Blank PO procedure in this manual.

C. Additional Quantities

C

- C.1 From the Extras Menu, click on the “Go To Survey PO Extra” button.
- C.2 On the PO, input the quantities as needed to complete the scope required. Be sure to use the note field to clarify if needed.

C.3 When finished with added quantities, proceed to step D or E.

		Project Manager: Joe Smith Sr. Project Manager: Jim Jones	Keys and Schuler Phone No.s Radio Alert: 503.555.1212 Radio Alert: 503.555.1212	
2635 NW 28th Ave., #210 Portland, OR 97216 503.223.6900 FAX 503.223.1445		Subdivision - Job No.: Orchard Heights - 126 Address: 1223 Excellent Times Rd. Albany, OR 97765	Site Phone: 503.555.1269 Site Fax: 503.555.1270 Tax: N/A	
Survey Extra 1	P.O. NO.: 260880-02X1	Lot: 26		
Gettysburg 1496K-000		Date Issued: July 23, 1999	Page 1 / 1	
Sub-Contractor / Vendor: Barker Surveying Co 2835 25th Street SE Salem, OR 97302		Phone: (503) 588-8800 Fax: (503) 588-8804		
Quantity	Description	Notes	Multiplier	Total
0	Hub & Tack		\$ 150.00	\$ -
0	Pin Footings & Foundation Survey		\$ 225.00	\$ -
0	Foundation Survey		\$ 150.00	\$ -
0	Mark Property Corners		\$ 100.00	\$ -
Schuler Homes of Oregon DBA Keys and Schuler Homes Cost Code: 7005			Sub Total: \$ -	
NOTE: Refer to your contract for terms and conditions.			Tax: \$ -	
			Total: \$ -	

Return to
EXTRAS
MENU

D. Modifying Scope



- D.1 If the current items listed on the PO do not match the scope of work needed, you can simply edit the lines as needed or input data on any unused lines.
- D.2 Refer to step C of the Base Scope procedure above for an example.
- D.3 When finished, click on the "Return to Extras Menu" button to continue and proceed to step E.

E. Batch Print Number



- E.1 After returning to the extras menu, you can print or batch print the PO.
- E.2 Simply input a number into the "Set Batch Print Code" field shown above.
- E.3 When finished, proceed to step F of this procedure.



F. Print the PO / Batch Print

- F.1 After issuing the PO, you can now print this single PO or batch print a group of POs.
- F.2 To print this PO by itself, simple click on the “Print Survey PO Extra” button.
- F.3 To batch print this PO with others, simply input a code equal to the batch code of the other orders. Then click on the “Batch Print Extras” button shown below. The batch print button is located at the upper left of the extras menu.




4.0 EXAMPLES

EX-01 Base Scope Survey PO

EX-02 Extra Survey PO No. 1 (Not Shown)

EX-03 Modified Base Scope Survey PO (Not Shown)

 280NW 28th Ave., #10 Portland, OR #10 83.223.80 FAX 83.223.1446	Project Manager: <u>de Smith</u> Sr. Project Manager: <u>Jim Jones</u>	Keys and Schuler Phone No.s Radio Alert: <u>83.5212</u> Radio Alert: <u>83.5212</u> Site Phone: <u>83.520</u> Site Fax: <u>83.520</u>
	Subdivision - Job No. : <u>Orchard Heights - 126</u> Address: <u>1223 Excellent Times Rd.</u> <u>Albany, OR 97</u>	Tax: <u>N/A</u> Lot: <u>26</u>
	Survey P.O. NO. : <u>26H00-02</u> Gettysberg 1498K-000 Date Issued: <u>13-Jul-00</u> Page 1 / 1	

Sub Contractor / Vendor : <u>Barker Surveying Co</u> <u>2035th Street SE</u> <u>Salem, OR 902</u>	Phone: <u>8380</u> Fax: <u>8384</u>
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Quantity	Description	Notes	Multiplier	Total
0	Hub & Tack		\$ 150.00	\$ -
1	Pin Footings & Foundation Survey		\$ 325.00	\$ 325.00
0	Foundation Survey		\$ 150.00	\$ -
0	Mark Property Corners		\$ 100.00	\$ -

Schuler Homes of Oregon DBA Keys and Schuler Homes
 Cost Code: 7005

Sub Total:	\$ <u>0</u>
Tax:	\$ <u>-</u>
Total:	\$ <u>0</u>

NOTE: Refer to your contract for terms and conditions.

Signatures:

Sub Contractor / Vendor: _____ Print Name and Title: _____	Project Manager: _____ Print Name: Joe Smith Sr. Project Manager: _____ Print Name: Jim Jones
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RELEASE FOR PAMENT:
 All work described by the scope of Purchase/Subcontractor Order between the Subcontractor/Supplier and General Contractor has been completed, and, upon payment to us of the above amount, all payments due have been received. Subcontractor/Supplier agrees that Contractor and Owner will NOT pay for services not specifically stated in this Purchase/Subcontractor Order. The Subcontractor/Supplier does hereby fully, completely and finally release and waive all mechanics' and materialmens's liens, lien rights and claims which we may now have or which may arise in the future with respect to the Scope of Purchase/Subcontractor Order on account of labor, materials or any other items used and/or furnished by us, or which may in the further be furnished by us. Subcontractor/Supplier shall indemnify and hold harmless Contractor and Owner, and their respective officers, directors, shareholders, and employees, from and against all claims or losses arising from the acts or omissions of Subcontractor/supplier, it's agents and employees, in the execution of the services contracted for under this Purchase/Subcontractor Order and the satisfaction of or failure to satisfy its conditions. **THIS RELEASE AND WAIVER IS FINAL, CONCLUSIVE, IMMEDIATELY EFFECTIVE AND UNCONDITIONAL**

Subcontractor / Supplier Work performed for this Purchase / Subcontract Order has been successfully completed.

Superintendent / Project Manger
 Date: _____