



GETTING STARTED

A CHECKLIST AND GUIDE

Getting Started

Thank you for choosing Stone Profit Systems (SPS). This Workbook is a tool that will help you and your company during the beginning stages of your system setup. For your convenience, use the pages in this book to take notes, mark dates, and keep track of the entire install process.

Enclosed you will find:

- Timeline
- Install Checklist
- Configuration Questions
- Data Migration Instructions
- Client Computer Hints

URL: _____

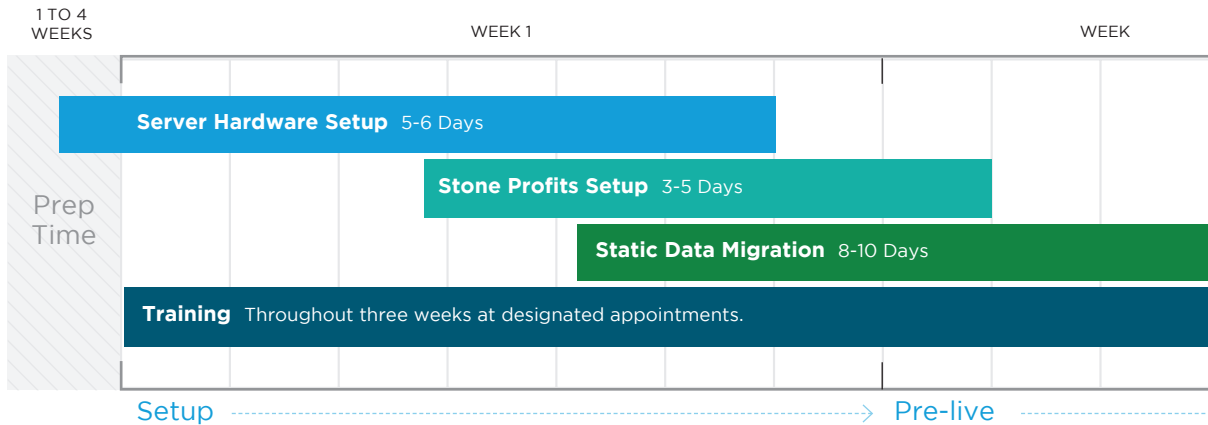
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Installation Timeline



Server Hardware Setup

- Hosting Server Quotations
- Contracts and Paper Work
- Install Windows Server
- Install SQL Server
- Configure IIS and SQL Server
- Configure E-mail Server
- Configure Fax Server

Stone Profits Setup

- Install Stone Profit Systems
- Install license File
- Setup Locations
- Logos
- Addresses
- Print Formats
- Accounting Defaults
- User Access Rights
- Parameters
- Drop-Downs
- Print Disclaimers

Static Data Migration

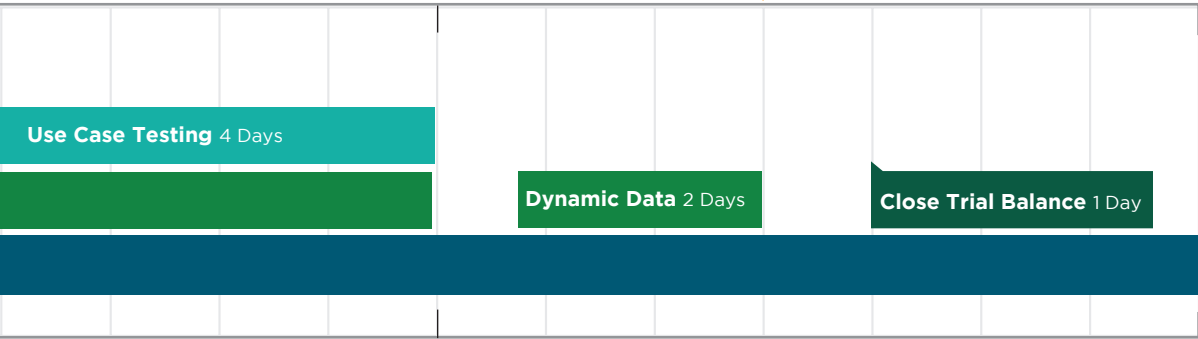
- Chart of Accounts
- Customers
- Products
- Services
- Suppliers
- Vendors
- Associates
- Resources
- Tax Codes and Authorities

Dynamic Data Migration

- Inventory in-stock
- Opened Accounts Receivable
- Opened Accounts Payable
- Schedule
- CRM Files
- Files

SPS Goes Live

WEEK 3



Post live

Use Case Testing

- Purchase Scenarios
- Inventory Scenarios
- Sales Scenarios
- Customer Login Scenarios

Training

- Administration
- Purchasing
- Inventory
- Pre-Sales
- Sale Orders
- Accounting
- Reports

SPS Live

___ Date in which your company stops using old system/methods, and begins using Stone Profit Systems.

Post Live

___ Close Trial Balance

Install Checklist

1. Contracts

- 1.1 Contracts Signed and Approved
- 1.2 Wire Deposit
- 1.3 (SPS) License File Generation
- 1.4 Credit card setup for hosting fees

2. Server and System Installation

- 2.1 (SPS) Install License File
- 2.2 (SPS) Client entered into SPS support system
- 2.3 (SPS) Setup basic system defaults - [page 09](#)
(Bar-Code prefix, Company Details)
- 2.4 (SPS) Setup System URL
- 2.5 Set up Control Switches - [page 13](#)

3. Static Data Migration - [page 19](#)

- 3.1 Chart of Accounts
- 3.2 Customers
- 3.3 Item Master
- 3.4 Services Master *
- 3.5 Inventory Suppliers
- 3.6 Non Inventory Vendors
- 3.7 Associates
- 3.8 Contacts
- 3.9 Price List *
- 3.10 Tax Codes
- 3.11 Zip Codes

4. Training - [page 43](#)

- 4.1 Admin and System Setup
(User Admin, System Terminology, Terms, Package Setup)
- 4.2 Purchasing & Master List
(PO's, Supplier Invoice/Packing List, Inventory Receipts, Freight, and Landed Costs)
- 4.3 Inventory
(Inventory Search, Adjustments, Transfers, Product Master List)
- 4.4 Pre-Sales
(Opportunities, Quotes, Visits, Sample Orders, Transfers)

(SPS) = Stone Profit Systems Task

* If Applicable - Fabricator Items

-
- 4.5 Sales
(Sales Orders, Job Tracking, Job Scheduling, Invoicing, Pick Tickets, Packing List)
 - 4.6 Scheduling *
(Calendar Views, Dashboards, Resources, Events and Event Types)
 - 4.7 Accounting & Reports
(AR, AP, Banking, General Ledger, System Reports)

5. Add-On Modules

6. System Configuration and Setup

- 6.1 User Types and User Setup
- 6.2 Quote Package Setup *
- 6.3 Job Scheduling Setup *
- 6.4 Print Documents Format and Policies Setup - page 47
(Quote, sale order, invoice, PO)
- 6.5 Bar-Code Setup - page 65
- 6.6 Send Void Business Check For Setup
- 6.7 Fax Setup *
(Requires efax, rightfax, or similar online fax account)

7. Dynamic Data Migration - page 75

- 7.1 Inventory Details
(Slabs and non-slabs)
- 7.2 Open AR Invoices
(Open customer Invoice details)
- 7.3 Open AR Receipts
(Open customer Payment/Receipts details)
- 7.4 Open AP
(Open vendor Invoice details)
- 7.5 Trial Balance
(Debit or credit balances in different accounts)

8. Go Live

- 8.1 (SPS) Additional Support on Go Live Date
- 8.2 Customer Satisfaction Report and Sign Off
- 8.3 Wire Remaining Balance
- 8.4 Credit Card Setup for Support and Maintenance

(SPS) = Stone Profit Systems Task

* If Applicable - Fabricator Items

Basic System Defaults

To Set up the system there is a set of variables that need to be defined. These variables are essential to the operation of the system in accordance with your business. SPS will set up a call with you to go over all the variables and set up the appropriate vales. This section of the book can be used to keep up with what has been discussed and what has not.

COMPLETED	SETUP SECTION	COMPLETED	SETUP SECTION
_____	Company	_____	Sales
_____	Product & Inventory	_____	Jobs & Scheduling
_____	Purchasing	_____	Sales Tax
_____	Pre-Sales	_____	Add-On Modules

Scheduled Phone Call: ___ / ___ / ___ : ___

Company Setup

COMPLETED	VARIABLES
_____	Bar-Code Prefix
_____	Login Screen Title
_____	Company Logo
_____	Print Company Title
_____	Purchase Print Address
_____	Sale Print Address
_____	Company Profile (<i>Address & Contact Info</i>)
_____	Business Process Options (<i>Items Kinds, Labels, Presale Labels, etc.</i>)
_____	Currency Setup
_____	Transaction Starting Numbers
_____	Party Starting Codes (<i>Customers, Suppliers, Vendors</i>)
_____	Event Types, Bin Types, Resource Types & Subtypes

Product & Inventory Setup

COMPLETED	VARIABLES
_____	Product line discussion (<i>Types, Categories, Groups</i>)
_____	Units of Measure
_____	Product Types & Forms
_____	Product Categories & Sub-Categories
_____	Product Groups
_____	Product Price Ranges
_____	Product Price Levels
_____	Inventory Identifiers
_____	Service Types
_____	Inventory Adjustment Reason Codes
_____	Bar-code Label Setup (p67)
_____	Hold Label Setup (p72)
_____	Logistics Codes

Purchasing Setup

COMPLETED	VARIABLES
_____	Inventory Supplier Types
_____	Supplier Ports
_____	PO Statuses

Pre-Sales Setup

COMPLETED	VARIABLES
_____	Quote Stages
_____	Quote Segments
_____	Project Types
_____	Calculator Setup
_____	Marketing Channels
_____	Quote Probability to Close %'s

Sales Setup

COMPLETED	VARIABLES
_____	Customer Types
_____	Delivery Methods
_____	Piece Types
_____	Pricing Discount Percentages

Jobs & Scheduling Setup *

COMPLETED	VARIABLES
_____	Event Categories / Workflow Departments
_____	Tasks and Milestone
_____	Event Sets (<i>Grouping of Tasks and Milestone</i>)

Sales Tax Setup

COMPLETED	VARIABLES
_____	Tax Items
_____	Tax Codes
_____	Tax Exempt Reasons

Addon Modules Setup

COMPLETED	VARIABLES
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Control Switches & Defaults

This section lists out various configurations that can be turned on or off depending on how you run your business. Please read through the following control switches, if one applies to your business fill in a value on the blank line. If the configuration does not apply to your business, mark “no” on the line. There will be hints along the way to help you fill in the appropriate value.

Y/N/Value	Section	Switch/Description
<hr/> MM/DD/YY	Company	Go Live Date This is the date that you will stop using your old system/ methods and begin using Stone Profit Systems. SPS_GOLIVE_DATE
<hr/> YES/NO	Accounting	Allow Unequal Journal Entries. This would allow you to save journal entries in which the total debits does not equal the total credits. SPS_AllowUnequalJournalEntries
<hr/> CITY/NO	Customers	Set Customers to a Default Location Any new customer would be set to your desired location by default. 152 - defaultcustomerlocation

Y/N/Value	Section	Switch/Description
_____ YES/NO	Inventory	<p>Show Slabsmith Inventory</p> <p>If your company uses Slabsmith, SPS can access the Slabsmith server and use the slab information and images.</p> <p>492 - SPS_ShowSlabSmithInventory</p>
_____ :\COMPUTER\FILENAME\FILENAME -OR- NO	Slabsmith	<p>Enter the Path to the Slabsmith Image Folder Within the Slabsmith Server</p> <p>If your company uses Slabsmith, SPS can access the Slabsmith server and use the slab images. To the left please provide the path to the image folder. (:\Computer\filename\filename)</p> <p>932 - SPS_Slabsmith_ImageFolderURL</p>
_____ YES/NO	Invoice	<p>Allow Invoices to be Deleted</p> <p>This would allow you to completely delete invoices in the system.</p> <p>383 - SPS_DELETE_INVOICE_Allow</p>
_____ CITY/NO	PO	<p>Set Default Location as Ship To for Purchase Orders</p> <p>Any purchase order created would set the ship to address to your desired location by default.</p> <p>401 - SPS_PO_DefaultLocation</p>
_____ YES/NO	PO	<p>Show Consignment Locations for Ship To Drop-Down</p> <p>This would allow the system to add consignment locations as a ship to address for POs if desired.</p> <p>409 - SPS_PO_ShowConsignments_in_ShipTo</p>

Y/N/Value	Section	Switch/Description
YES/NO	PO	<p>In PO Show Customer in Ship To Field</p> <p>This would allow the system to add customers as a ship to address for POs if desired.</p> <p>410 - SPS_PO_ShowCustomers_in_ShipTo</p>
\$0,000.00/NO	PO	<p>Set a Dollar Limit for PO Approval</p> <p>This function allows you to set a dollar limit for POs. If a PO exceeds this amount, it will need approval before processing.</p> <p>418 - SPS_PO_Without_Approval_Limit</p>
CITY/NO	Supplier Invoice / Packing List	<p>Set a Default Location as the Ship To for the Supplier Invoice/Packing List</p> <p>Any supplier invoice/packing list created would set the ship to address to your desired location by default.</p> <p>430 - DefaultSupplierInvoiceLocation</p>
YES/NO	SO	<p>Make Invoice Number the Same as SO</p> <p>This function would force the system to match the invoice number to the Sale Order number from which the invoice was created.</p> <p>373 - SPS_SO_InvoiceNumber_IsSameAS_SONumber</p>
YES/NO	SO	<p>Check Customer's Credit Standing for Pick Ticket</p> <p>This function would compare the customer's balance to their credit limit, and confirm their credit standing. If the customer is over their limit, the pick ticket will not be made.</p> <p>374 - SPS_PT1_Check_Credit_InPickTicket</p>

Y/N/Value	Section	Switch/Description
_____ YES/NO	SO	<p>Ability to Select a freight Carrier for SO Shipments</p> <p>This configuration will show a field in the SO page that would allow you to select a freight carrier that would complete the shipment/delivery.</p> <p>330 - SPS_SO_ShowFreightCarrier</p>
_____ YES/NO	SO	<p>Make Freight Carrier for SO Shipments Required</p> <p>This configuration would make the freight carrier field required.</p> <p>356 - SPS_SO_FreightForwarder_IS_Required</p>
_____ YES/NO	SO	<p>Require Zip Code for Deliveries</p> <p>This would make the ship to zip code field required for any deliveries.</p> <p>319 - SPS_SO_Delivery_Zip_IsRequired</p>
_____ YES/NO	SO	<p>Ship To and Bill To Must be Entered Contacts</p> <p>This would require the Ship to and bill to address to be entries that are pre-registered with the customer in the customer contacts.</p> <p>SPS_SO_Shipto_Billto_ContactsOnly</p>
_____ YES/NO	SO	<p>Determine Tax Rate by Zip Code</p> <p>This function will use the ship to zip code to determine the tax.</p> <p>338 - SPS_SO_Tax_Lookup_on_ZipCode</p>

Y/N/Value	Section	Switch/Description
_____ YES/NO	SO	<p>All Products on SO are Taxable</p> <p>This would make all products on a SO subject to taxes.</p> <p>339 - SPS_SO_Products_Are_Taxable</p>
_____ YES/NO	SO	<p>All Services on SO are Taxable</p> <p>This would make all services on a SO subject to taxes.</p> <p>341 - SPS_SO_Services_Are_Taxable</p>
_____ YES/NO	SO Activity	<p>Setup Restrictions for Swapping Slabs When Picking for SOs</p> <p>This function will address your team's ability to swap specified products on a SO with product that is easier to pick.</p> <p>SPS_SO_Show_PickTicketRestriction</p>
_____ SLAB/LOT/PRODUCT/NO	SO Activity	<p>Setup Default Value for Swapping Restriction for Products on SO</p> <p>Set a default value for pick ticket swap restrictions. Slab specific will not allow a swap, lot specific will allow a swap within the same lot, product specific will allow a swap within the same product name/color</p> <p>352 - SPS_SO_PickTicketRestriction_Default_Value</p>
_____ YES/NO	SO Activity	<p>Quantity Cannot be Edited in SO</p> <p>This would restrict the quantity field from being edited for stock products in a SO.</p> <p>353 - SPS_SO_StockProduct_Quantity_ReadOnly</p>

Y/N/Value	Section	Switch/Description
PRICE LEVEL/NO	SO Activity	<p>Stock Product on SO set to Specific Price Level by Default</p> <p>This would set a default value for the price level in the stock product edit/add page</p> <p>354 - SPS_SO_StockProduct_FloorPriceLevel</p>
CITY/NO	Suppliers	<p>Set Suppliers to a Default Location.</p> <p>Any new supplier would be set to your desired location by default.</p> <p>DefaultSupplierLocation</p>

Static Data Migration File Formats

For static data migration Stone Profit Systems will be sending you Excel files listing the information needed for each item to be migrated. There will be an Excel file for each of the migration types listed below. With these files you will fill/paste your information in the designated columns. The following pages in this book have the data fields listed out with descriptions and examples to help you provide SPS with the appropriate information.

NOTE: Static data migration should be completed before training is scheduled.

COMPLETED	# OF ITEMS	STATIC MIGRATION TYPES
_____	_____	Chart of Accounts
_____	_____	Customers
_____	_____	Items/Products
_____	_____	Services
_____	_____	Suppliers
_____	_____	Vendors
_____	_____	Associates
_____	_____	Contacts
_____	_____	Price List
_____	_____	Tax Codes
_____	_____	Zip Codes

Chart of Accounts

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
AccountNumber	AlphaNumeric	50	Numerical identifier for the account. <i>0136468444</i>
Account Name	AlphaNumeric	100	Descriptive name for the account. <i>Accounts Receivable</i>
Alternate Number	AlphaNumeric	50	Alternate numerical identifier for the account. <i>0136</i>
Alternate Name	AlphaNumeric	100	Alternate descriptive name for the account. <i>AR</i>
Account Type	AlphaNumeric	50	Defining the account type will determine how the account is used in the various parts of the system. Type of Account examples include: Expense, Income , Current Assets, Other Expense, etc. Value must be one of the following <ul style="list-style-type: none"> <i>Assets - Cash</i> <i>Assets - Bank</i> <i>Assets - Credit Card</i> <i>Assets - Accounts Receivable</i> <i>Assets - Fixed Assets</i> <i>Assets - Inventory</i> <i>Assets - Current Assets</i> <i>Assets - Other Current Assets</i> <i>Liabilities - Accounts Payable</i> <i>Liabilities - Current Liabilities</i> <i>Liabilities - Other Current Liabilities</i> <i>Liabilities - Long Term Liabilities</i> <i>Income - Sales Income</i> <i>Income - Other Income</i> <i>Expense - Cost Of Goods</i> <i>Expense - Accumulated Depreciation</i> <i>Expense - Operating Expense</i> <i>Expense - Other Expense</i> <i>Equity - Equity</i> <i>Equity - Retained Earnings</i>
Special Account Type	AlphaNumeric	50	The system is programmed to show certain accounts as options in specific parts of the system. Use the Data Value options to define how and where an account should show. Value must be one of the following <ul style="list-style-type: none"> <i>Credit Card</i> <i>Undeposited funds</i> <i>Freight Charges</i> <i>Inventory Adjustment</i> <i>Payroll Expenses</i> <i>Opening balance Equity</i> <i>Sales Tax payable</i> <i>Payroll Liabilities</i>

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtBank Location	AlphaNumeric	500	Enter the city location of the your bank it should be the same as the cities listed for locations/profit centers <i>Chicago</i>
Is Default InType	AlphaNumeric	10	Enter "ON" if this is a default account for the special account type otherwise leave it blank <i>"on", ""</i>
mtParent Reference	AlphaNumeric	500	If accounts need to be grouped with other accounts, you will need to define the groups. Enter the name of the parent (group) account in this field. (For the accounts to be grouped the defined parent name must be typed in the exact same way.) <i>Accounts Receivable</i>
Sublevel	Integer		The level of the account in the accounting hierarchy <i>0, 1, 2, 4</i>
mtCurrency	AlphaNumeric	100	Enter the currency in which this account should function. <i>USD,INR,EURO</i>
Is Tax	AlphaNumeric	10	Enter "ON" if this Account is included in the Budget <i>"on", ""</i>
Is Budgeted	AlphaNumeric	10	If this account is a bank account enter the name of the bank. If it is not a bank account leave it blank. <i>"on", ""</i>
Bank Name	AlphaNumeric	50	If this account is a bank account enter the name of the branch. If it is not a bank account leave it blank. <i>Georgia Commerce</i>
Branch Name	AlphaNumeric	50	If this account is a bank account enter the name of the branch. If it is not a bank account leave it blank. <i>Chicago - Streeterville</i>
Manager	AlphaNumeric	50	If this account is a bank account enter the manager's name for the Bank. If it is not a bank account leave it blank. <i>James Cathlic</i>
Phone Number	AlphaNumeric	15	If this account is a bank account enter the Phone number for the Bank. If it is not a bank account leave it blank. <i>"312-420-5010"</i>
Fax Number	AlphaNumeric	15	If this account is a bank account enter the Fax number for the Bank. If it is not a bank account leave it blank. <i>"773-527-2870"</i>

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Website	AlphaNumeric	50	If this account is a bank account enter the Web site for the Bank. If it is not a bank account leave it blank. <i>www.stoneprofits.com</i>
Swift Code	AlphaNumeric	50	If this account is a bank account enter the SWIFT code for Transactions made through this Bank. If it is not a bank account leave it blank. <i>BOFAIN4XMAA</i>
Routing Number	AlphaNumeric	50	If this account is a bank account enter the routing number for the Bank. If it is not a bank account leave it blank. <i>"121141822"</i>
Bank Account Number	AlphaNumeric	50	If this account is a bank account enter the Bank Account number. If it is not a bank account leave it blank. <i>"911987654321"</i>
Is Print Checks	AlphaNumeric	10	Enter "ON" if you need to be able to Print Checks from this Account <i>"on", ""</i>
Internal Notes	AlphaNumeric	1000	Enter any notes that you would like to have recorded in the system. <i>This account is used for Account Receivables</i>

Customers

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Name	AlphaNumeric	150	This should include the full unique name of the Billing Customer/Company with spaces. <i>ABC Customer; 124 - Construction company.</i>
Code	AlphaNumeric	50	CODE, ID, or Number used to quickly identify the customer. <i>ACT101, C001351</i>
PrintName	AlphaNumeric	150	Enter the name of the customer as it should appear on checks. This is usually a DBA or a secondary name of the company. <i>ABC Customer LLC</i>
LegacyID	AlphaNumeric	50	Legacy ID is the ID/number designated for this customer in the previous system. <i>34, 1223</i>

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtSubType	AlphaNumeric	50	Enter a value that defines the business type of the customers. E.g. Fabricator, Distributor, etc. <i>Fabricator, Contractor</i>
ContactName	AlphaNumeric	50	Enter the name of the contact person for this company. <i>James Corby</i>
mtReferredby	AlphaNumeric	150	Name of an existing customer that has referred this Customer to do business with you. <i>Stone Care LLC</i>
Phone1	AlphaNumeric	50	Primary Phone number. <i>866-858-1915</i>
Phone2	AlphaNumeric	50	Secondary Phone number. <i>866-858-1916</i>
Fax	AlphaNumeric	50	Fax number. <i>773-527-2870</i>
Mobile	AlphaNumeric	50	Mobile number of primary contact. <i>312-420-5010</i>
Email	AlphaNumeric	100	Primary e-mail address. (enter only one) <i>customername@gmail.com</i>
URL	AlphaNumeric	50	Web site address. <i>www.customerwebsite.com</i>
Address	AlphaNumeric	50	Billing Address line 1 <i>3500 Almoa Ave.</i>
Address2	AlphaNumeric	50	Billing Address line 2 <i>Suite W-10</i>
City	AlphaNumeric	50	Billing City <i>Winter Park</i>
State	AlphaNumeric	50	Billing State <i>FL</i>
Zip	AlphaNumeric	10	Billing Zip Code <i>32792</i>
mtCountry	AlphaNumeric	50	Billing Country <i>United States</i>
ShippingAddress	AlphaNumeric	50	Shipping Address line 1 <i>7215 NW 41 STREET</i>

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
ShippingAddress2	AlphaNumeric	50	Shipping Address line 2 <i>UNIT G</i>
ShippingCity	AlphaNumeric	50	Shipping City <i>Chicago</i>
ShippingState	AlphaNumeric	50	Shipping State <i>FL</i>
ShippingZip	AlphaNumeric	50	Shipping Zip Code <i>33166</i>
mtShippingCountry	AlphaNumeric	50	Shipping Country <i>United States</i>
mtLocation	AlphaNumeric	50	Enter one of your locations in which this customer primarily does business with. <i>Chicago</i>
IsMultiLocation	AlphaNumeric	10	Enter "on" if this customer can be sold to from locations other than the customer's parent location. Leave blank if customer is only to be sold to from Parent Location. <i>"on"</i>
mtRoute	AlphaNumeric	50	Enter a value that defines the general geographic location of this customer according to delivery routes. <i>Orlando - East</i>
mtSalesRepID	AlphaNumeric	50	Enter name of the primary sales rep for this customer from your list of employees. <i>Carlos Riviera</i>
mtPriceLevel	AlphaNumeric	50	Enter the price level that needs to be applied to most products sold to this customer. <i>Price6 - Price6</i>
mtPriceLevel2	AlphaNumeric	50	Enter a secondary price level if some of your products have to be sold at a different price level to this customer. <i>Price5 - Price5</i>
mtPaymentTerms	AlphaNumeric	50	Enter the default payment terms for this customer. <i>Net 30, Net 45, C.O.D</i>
mtSalesTax	AlphaNumeric	50	Enter the default sales tax code for this customer. <i>COLUMBIA - 7%</i>
IsTaxExempt	AlphaNumeric	10	Enter "on" if this Customer is Tax Exempt. Leave blank if customer is not tax exempt. <i>"on"</i>

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtTaxExemptReason	AlphaNumric	50	Enter the reason for which this customer is tax exempt. <i>Reseller</i>
ExemptCertificateNo	AlphaNumric	50	Enter the customer's tax exempt certificate number if this Customer is Tax Exempt . Leave it blank if the customer is not tax exempt. <i>23-8012166927-5 12</i>
ExemptExpiryDate	AlphaNumric	50	Enter the date when the Customer's tax exempt status becomes invalid. <i>3/20/2020</i>
IsPORequired	AlphaNumric	10	Enter "on" if a PO# is required for all Sales Orders / Invoices created for this Customer. <i>"on"</i>
ApplyFinanceCharge	AlphaNumric	10	Enter "on" if the customer should be charged a finance charge if payment on any of their invoices exceeds their due date. <i>"on"</i>
Preferred Document Delivery Mode	AlphaNumric	50	Preferred contact method for this customer. <i>E-mail, Mail</i>
mtCurrency	AlphaNumric	50	Enter the default currency for transactions to this customer. <i>USD, EURO</i>
SinceDate	AlphaNumric	50	Enter the date since the customer has been setup in your system. <i>1/5/2005</i>
TaxNumber	AlphaNumric	50	Tax ID Number of the customer company. <i>32009547475</i>
mtLanguage	AlphaNumric	50	Preferred Language for interaction with this customer. <i>English</i>
CreditLimit	AlphaNumric	50	Maximum credit allowed for this customer. <i>50000.00</i>
PastDueAlert	AlphaNumric	150	Enter any message that shows up as an alert but still lets the users convert Sales orders to invoices. <i>This customer has past due</i>
LockAlert	AlphaNumric	150	Enter any message that shows up as an alert and locks down the users from converting Sale orders to invoices. <i>this customer is locked</i>

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
IsAllowLogin	AlphaNumeric	10	Enter "on" if you want to give this customer access to the Customer login module. <i>"on"</i>
Username	AlphaNumeric	50	Enter this customer's Username for the customer login module. <i>john</i>
Password	AlphaNumeric	50	Enter this customer's Password for the customer login module. <i>password</i>
DeliveryInstructions	AlphaNumeric	1000	Enter the default delivery instructions for this customer. <i>Always pick up cash or check.</i>
InternalNotes	AlphaNumeric	500	Enter notes for this customer meant for inter company communication. These notes do not print on any documents related to this customer. <i>Very difficult customer</i>

Items/Products

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
ItemType	AlphaNumeric	50	Should be PRODUCT for all the Materials <i>Product</i>
SubItemType	AlphaNumeric	50	"The value for Sub-Item Type should be: - 'STOCK' for materials that are usually inventoried. - 'NON-STOCK' for materials that are not usually inventoried. - 'SUPPLIES' for materials that are not for sale, but are purchased as supplies/consumables for shop, showroom, office, etc." <i>Stock</i>
SKU	AlphaNumeric	50	Store Keeping Unit : Alphanumeric value or code of the material and is unique to every material. <i>ABS3</i>
Name	AlphaNumeric	150	Your selling name for this material - name must be unique based on selling price. <i>Absolute Black 3cm</i>
AlternateName	AlphaNumeric	150	Alternate name of the product is any additional name that is known to be used in the industry by suppliers or customer. <i>Black Absolute 3cm</i>

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtProductForm	AlphaNumeric	50	This is the first level category of the products/materials. It is usually based on the shape/format of the Material. E.g. : SLAB , TILE, SINKS, FAUCETS, etc. (If dimensions are tracked in inventory the type must be defined as SLAB.) <i>SLAB, Tile</i>
mtServiceCategory	AlphaNumeric	50	This is the second level category of the product. It is usually based on the nature of the product/material. E.g. : Granite , Limestone, marble, travertine etc <i>Granite / Marble</i>
mtParentItem	AlphaNumeric	50	"If this product belongs to a family of products, A family name has to be setup and defined for each product within that family. E.g.: Absolute Black -- Family Name - Absolute Black 2cm -- Family member - Absolute Black 3cm -- Family member - Absolute Black 12x12 -- Family member..." <i>Absolute Black</i>
mtBaseColors	AlphaNumeric	50	This is the base color of the product. <i>Black / Aqua</i>
mtOrigin	AlphaNumeric	50	This is the country of origin from which this product was quarried or manufactured. <i>United States</i>
mtItemGroup	AlphaNumeric	50	This is an additional level of grouping for the products. <i>Staples / Exotics / Premium</i>
SeriesName	AlphaNumeric	50	This defines the product line/series that a product/item might belong to. <i>ABC</i>
mtPurchasingUnits	AlphaNumeric	50	Unit of measure in which this product is being purchased. <i>SF, Each, LF</i>
mtSellingUnits	AlphaNumeric	50	Unit of measure in which the product is being sold. <i>SF, Each, LF</i>
Selling Units Per Purchasing Units	AlphaNumeric	50	Number of selling units per purchasing unit. <i>1</i>
Weight	AlphaNumeric	50	Weight per unit in pounds. <i>4</i>
ProductSize	AlphaNumeric	50	Thickness of the product. <i>2CM</i>

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtPickingUnit	AlphaNumeric	50	Unit of measure in which the product is being picked for a transaction. <i>box, bundle</i>
SellingUnitsPerPU	AlphaNumeric	50	Number of Selling Units per Picking Unit. <i>1</i>
IsIndivisibleItem	AlphaNumeric	50	Enter 'on' if you do not want to be able to sell partial quantities of inventory from each inventory line of this product. Must be ON for Slab. Typically it is left blank for tiles and other non slab items. <i>on</i>
mtPriceRange	AlphaNumeric	50	Enter a value based on how you define pricing groups. <i>Low, Medium, High, Level 1, Level 2, ...</i>
mtGLSalesAccount	AlphaNumeric	50	Enter the income account number which gets credited when this product is invoiced to a customer. <i>4010</i>
mtGL Inventory Account	AlphaNumeric	50	Enter the asset account that gets debited when this product is received into inventory. <i>1220</i>
mtGL Cost of Sales Account	AlphaNumeric	50	The Cost of Sales or COGS account that gets debited when this product is invoiced to a customer. <i>5000</i>
mtPreferredSupplier	AlphaNumeric	50	Enter the preferred supplier for this product. <i>ABC Granite & Marble</i>
SupplierSKU	AlphaNumeric	50	Supplier's SKU for this product. <i>ABCGM</i>
Supplier Product Name	AlphaNumeric	150	Name by which the supplier sells this product. <i>Black Absolute 3cm</i>
IsNewArival	AlphaNumeric	50	Enter "on" if this should be considered a NEW ARRIVAL in the system. If not, leave it Blank. <i>on</i>
ShowonWebsite	AlphaNumeric	50	Enter "on" if this product should be setup to show on your web site (web site connect module). Leave it blank if the product should NOT show. <i>on</i>
WebName	AlphaNumeric	50	Enter the name of the product as you want it to appear on your web site. <i>Absolute Black 3cm</i>

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Description on Web site	AlphaNumeric	50	Enter any additional description that you want to display on the web site. <i>This gorgeous stone is black overall with khaki, brown and black mineral deposits.</i>
Notes	AlphaNumeric	50	Enter any additional notes for this product. <i>This product is in high demand.</i>
mtAlternateUOM1	AlphaNumeric	50	Alternate Unit of measure for the product. <i>CT</i>
UOMToSFConversion	Numeric	50	Conversion factor between the alternate UOM and square footage. <i>10</i>
UOM To Carton Conversion	Numeric	50	Conversion factor between the alternate UOM and a carton. <i>1</i>
UOM To Pallet Conversion	Numeric	50	Conversion factor between the alternate UOM and a pallet. <i>1</i>
Price1	Numeric	50	Level 1 selling price per UOM <i>10.75</i>
Price2	Numeric	50	Level 2 selling price per UOM <i>10.00</i>
Price3	Numeric	50	Level 3 selling price per UOM <i>9.75</i>
Price4	Numeric	50	Level 4 selling price per UOM <i>9.50</i>
Price5	Numeric	50	Level 5 selling price per UOM <i>9.25</i>
Price6	Numeric	50	Level 6 selling price per UOM <i>9.15</i>
Price7	Numeric	50	Level 7 selling price per UOM <i>9.00</i>
TaxStatus	AlphaNumeric	50	Enter "on" if the product should be taxable by default. Leave blank if not. <i>on</i>

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Consignment	AlphaNumeric	50	Enter 'on' if the product can be consigned to a Customer Location. Leave blank if not. <i>on</i>
IntroductionDate	Date	50	Date in which product was made available. <i>40756</i>
DiscontinueDate	Date	50	Date in which product will be discontinued. <i>2958465</i>
ProductOrigin	AlphaNumeric	50	Enter a value that defines the way the product was made part of your final inventory. E.g.: purchased, manufactured, fabricated, etc. <i>Manufactured</i>

Services

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
ItemType	varchar(50)	50	Should be 'Service' for all services. <i>Service</i>
SubItemType	varchar(50)	50	SPS Default - 'Service' <i>Service</i>
Name	varchar(150)	150	Name of the service. <i>Delivery Charges , Packing Fee etc</i>
SKU	varchar(50)	50	If this Service has any SKU associated with it, enter it here.
mtPurchasingUnits	varchar(50)	50	Selected from the list of Units by which this service can be purchased by <i>LF</i>
mtSellingUnits	varchar(50)	50	Selected from the list of Units by which this service can be sold by <i>LF</i>
mtServiceCategory	varchar(50)	50	"Enter a value that defines a category that this service belongs to. E.g.: Bullnose edge and Eased edge are in the category Edge Profiles" <i>Edge Profiles</i>

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtGLSalesAccount	varchar(50)	50	Enter the income account number which gets credited when this service is invoiced to a customer. <i>Revenue Fabrication</i>
mtPreferredSupplier	varchar(50)	50	Preferred vendor for this service. <i>Contractors and CO</i>
AvgEstCost	numeric	50	This is the approximate cost for this service. <i>11.00</i>
Price1	numeric	50	Level 1 selling price per UOM <i>12.00</i>
Price2	numeric	50	Level 2 selling price per UOM <i>11.50</i>
Price3	numeric	50	Level 3 selling price per UOM <i>11.00</i>
Price4	numeric	50	Level 4 selling price per UOM <i>10.50</i>
Price5	numeric	50	Level 5 selling price per UOM <i>10.00</i>
Price6	numeric	50	Level 6 selling price per UOM <i>9.50</i>
Price7	numeric	50	Level 7 selling price per UOM <i>9.00</i>
mtPriceRange	varchar(50)	50	Enter a value based on how you define pricing groups. <i>Low/ Medium</i>
Frequentinso	varchar(50)	50	Mark this field 'on' if the service is frequently charged in Sale Orders / Invoices. <i>on</i>
Frequent in customer cm	varchar(50)	50	Mark this field 'on' if the service is frequently charged in Customer Credit Memos. <i>on</i>
Frequentinpo	varchar(50)	50	Mark this field 'on' if the service is frequently charged in Purchase Orders. <i>on</i>

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Frequent in supplier cm	varchar(50)	50	Mark this field 'on' if the service is frequently charged in Supplier Credit Memos. <i>on</i>
Notes	varchar(50)	500	Enter any additional notes for this service.

Suppliers

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Name	AlphaNumeric	150	This should include the full unique name of the Inventory Supplier/Company with spaces. <i>ABC Granite & Marble</i>
PrintName	AlphaNumeric	150	Enter the name of the supplier as it should appear on checks. This is usually a DBA or a secondary name of the company. <i>ABC Granite & Marble LLC</i>
Code	AlphaNumeric	50	CODE, ID, or Number used to quickly identify the inventory supplier. <i>ABCGM</i>
ContactName	AlphaNumeric	50	Enter the name of the contact person for this company. <i>Jason</i>
mtSubType	AlphaNumeric	50	Enter "domestic" or "international" depending on whether the inventory supplier is local or overseas. <i>ABC Granite & Marble</i>
mtLocation	AlphaNumeric	50	Enter one of your locations in which this supplier primarily does business with. <i>ABC Granite & Marble</i>
mtLanguage	AlphaNumeric	50	Preferred language for any interaction with the supplier. <i>English</i>
SinceDate	AlphaNumeric	50	Enter the date since the supplier has been setup in your system. <i>5/16/2010</i>
mtPort	AlphaNumeric	50	Enter the preferred port for any shipments from this Supplier. <i>Montreal</i>

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
MarkupMultipliers	AlphaNumeric	10	Enter a value which the system uses to mark up the cost of products purchased from this supplier to calculate the selling price. <i>2.4</i>
Address	AlphaNumeric	50	Billing Address line 1 <i>445 E Ohio</i>
Address2	AlphaNumeric	50	Billing Address line 2 <i>Suite 350</i>
City	AlphaNumeric	50	Billing City <i>Chicago</i>
State	AlphaNumeric	50	Billing State <i>IL</i>
ZIP	AlphaNumeric	50	Billing Zip Code <i>60611</i>
mtCountry	AlphaNumeric	50	Billing Country <i>United States</i>
Phone1	AlphaNumeric	50	Primary Phone number. <i>312-828-0600</i>
Phone2	AlphaNumeric	50	Secondary Phone number. <i>312-828-0601</i>
Fax	AlphaNumeric	50	Fax number. <i>312-803-0012</i>
Mobile	AlphaNumeric	50	Mobile number of primary contact. <i>312-420-0377</i>
E-mail	AlphaNumeric	50	Primary e-mail address. (Enter only one) <i>support@stoneprofits.com</i>
URL	AlphaNumeric	50	Web site address. <i>www.stoneprofits.com</i>
TaxNumber	AlphaNumeric	50	Tax ID Number of the Supplier company. <i>52-4352452</i>

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtCurrency	AlphaNumeric	50	Enter the default currency for transactions to this supplier. <i>USD</i>
mtPaymentTerms	AlphaNumeric	50	Enter the default payment terms for this supplier. <i>Net 30 ,COD</i>
mtShipmentTerms	AlphaNumeric	150	Enter the default shipment terms for this supplier. <i>FOB , CIP,CIF etc</i>
IsPrint1099	AlphaNumeric	5	Enter "on" if this Supplier needs to be printed a 1099. <i>on</i>
mtSalesTax	AlphaNumeric	50	Enter the default Sales tax Code for invoices from this Supplier if they charge any tax. <i>chicago / Tax Exempt</i>
InternalNotes	AlphaNumeric	500	Enter notes for this supplier meant for inter company communication. These notes do not print on any documents related to this customer.
IsAllowLogin	AlphaNumeric	5	Enter "on" if you want to give this supplier access to the supplier login module. <i>on</i>
Username	AlphaNumeric	50	Enter this supplier's Username for the supplier login module. <i>Jason</i>
Password	AlphaNumeric	50	Enter this supplier's Password for the supplier login module. <i>abcd</i>
LegacyID	AlphaNumeric		Legacy ID is the ID/number designated for this supplier in the previous system.

Vendors

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Name	AlphaNumeric	150	This should include the full unique name of the Vendor/ Company with spaces. <i>Amex Logistics</i>
PrintName	AlphaNumeric	150	Enter the name of the vendor as it should appear on checks. This is usually a DBA or a secondary name of the company. <i>Amex Logistics</i>
Code	AlphaNumeric	50	CODE, ID, or Number used to quickly identify the vendor. <i>Amex</i>
ContactName	AlphaNumeric	50	Enter the name of the contact person for this company. <i>John</i>
mtLocation	AlphaNumeric	50	Enter one of your locations in which this vendor primarily does business with. <i>Chicago</i>
Address	AlphaNumeric	50	Billing Address line 1 <i>445 E ohio</i>
Address2	AlphaNumeric	50	Billing Address line 2 <i>suit 350</i>
City	AlphaNumeric	50	Billing City <i>Chicago</i>
State	AlphaNumeric	50	Billing State <i>IL</i>
ZIP	AlphaNumeric	10	Billing Zip Code <i>60611</i>
mtCountry	AlphaNumeric	50	Billing Country <i>United States</i>
Phone1	AlphaNumeric	50	Primary Phone number. <i>312-828-0600</i>
Phone2	AlphaNumeric	50	Secondary Phone number. <i>312-828-0601</i>

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Fax	AlphaNumeric	50	Fax number. <i>773-527-2870</i>
Mobile	AlphaNumeric	50	Mobile number of primary contact. <i>312-420-5010</i>
E-mail	AlphaNumeric	50	Primary e-mail address. (Enter only one) <i>support@stoneprofits.com</i>
URL	AlphaNumeric	50	Web site address. <i>www.stoneprofits.com</i>
mtPaymentTerms	AlphaNumeric	50	Enter the default payment terms for this customer. <i>30 Days / COD</i>
mtGLAccount	AlphaNumeric	100	Enter the number for the default Expense Account on all Bills that are entered for this Vendor. <i>3520</i>
AccountNumber	AlphaNumeric	50	Enter your account number with this Vendor. <i>1054789</i>
TaxNumber	AlphaNumeric	50	Tax ID Number of the vendor company. <i>52-4352452</i>
mtCurrency	AlphaNumeric	50	Enter the default currency for transactions to this vendor. <i>USD</i>
CheckMemo	AlphaNumeric	500	Enter the sentence or phrase that needs to be printed on checks towards this Vendor. <i>Amex Logistics</i>
IsPrint1099	AlphaNumeric	50	Enter "on" if this vendor needs to be printed a 1099. <i>on</i>
IsFreightVendor	AlphaNumeric	50	Enter "on" if bills from this vendor need to be linked to a supplier packing list for the system to auto-calculate the unit landed cost. <i>on</i>
IsSalesTaxAuthority	AlphaNumeric	50	Enter "on" if this vendor is a Sales tax Authority. <i>on</i>
IsSubContractor	AlphaNumeric	50	Enter "on" if this vendor is a Sub-contractor. <i>on</i>

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
InternalNotes	AlphaNumeric	500	Enter notes for this vendor meant for inter company communication. These notes do not print on any documents related to this vendor.

Associates

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Name	AlphaNumeric	150	This should include the full unique name of the associate or third party company with spaces. <i>Mark Albert</i>
Code	AlphaNumeric	50	CODE, ID, or Number used to quickly identify the associate or third party. <i>ABI001</i>
mtSubType	AlphaNumeric	50	Enter a value that defines the business type of the associate. E.g.: Architect , Designer, Contractor etc. <i>CONTRACTOR</i>
ContactName	AlphaNumeric	50	Enter the name of the contact person for this company. <i>Mark Albert</i>
Phone1	AlphaNumeric	50	Primary Phone number. <i>312-828-0505</i>
Phone2	AlphaNumeric	50	Secondary Phone number. <i>312-828-0506</i>
Fax	AlphaNumeric	50	Fax number. <i>312-803-0012</i>
Mobile	AlphaNumeric	50	Mobile number of primary contact. <i>312-420-5020</i>
E-mail	AlphaNumeric	50	Primary e-mail address. (Enter only one) <i>mark@gmail.com</i>
URL	AlphaNumeric	50	Web site address. <i>www.websitename.com</i>
Address	AlphaNumeric	50	Billing Address line 1 <i>1450 Madruca Ave.</i>

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Address2	AlphaNumeric	50	Billing Address line 2 <i>Suite 400</i>
City	AlphaNumeric	50	Billing City <i>Coral Gables</i>
State	AlphaNumeric	50	Billing State <i>FL</i>
Zip	AlphaNumeric	10	Billing Zip Code <i>33146</i>
mtCountry	AlphaNumeric	50	Billing Country <i>United States</i>
InternalNotes	AlphaNumeric	500	Enter notes for this associate meant for inter company communication. These notes do not print on any documents related to this customer.

Contacts

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtParty	AlphaNumeric	50	This should include the full unique name of the Customer/ Supplier/Vendor with spaces. <i>American Granite & Marble</i>
PartyType	AlphaNumeric	50	Enter the type of the party for which this is a contact. Only possible values are Customer, Supplier, or Vendor <i>Customer</i>
Title	AlphaNumeric	50	Enter the title for the contact. <i>Mr.</i>
Name	AlphaNumeric	50	Enter the full name of the contact. <i>Mark Albert</i>
Address	AlphaNumeric	50	Address line 1 <i>7215 NW 41 Street</i>
Address2	AlphaNumeric	50	Address line 2 <i>Unit G</i>

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
City	AlphaNumeric	50	City <i>Chicago</i>
State	AlphaNumeric	50	State <i>FL</i>
Zip	AlphaNumeric	10	Zip Code <i>33166</i>
mtCountry	AlphaNumeric	50	Country <i>United States</i>
Phone1	AlphaNumeric	50	Primary Phone number. <i>866-858-1915</i>
Phone2	AlphaNumeric	50	Secondary Phone number. <i>866-858-1916</i>
Fax	AlphaNumeric	50	Fax number. <i>773-527-2870</i>
E-mail	AlphaNumeric	50	E-mail address of the contact. <i>contactname@gmail.com</i>
IsShipToAddress	AlphaNumeric	50	Enter 'on' if this contact is actually a secondary shipping address. <i>on</i>
mtTaxCode	AlphaNumeric	50	Enter the tax code of the contact. <i>BREVARD</i>
InternalNotes	AlphaNumeric	500	Enter notes for this customer meant for inter company communication. These notes do not print on any documents related to this contact.

Price List

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtName	AlphaNumeric	150	Enter the name of the product which matches with the name of the product in the Item master list. <i>Absolute black 3cm</i>
mtSKU	varchar(50)	50	Store Keeping Unit : Alphanumeric value or code of the material. The value should match to the SKU's in the item master list. <i>ABS3</i>
mtLegacySKU	varchar(150)	150	SKU of the material in the previous database or system
Price1	money		Level 1 selling price per UOM <i>15.00</i>
Price2	money		Level 2 selling price per UOM <i>14.00</i>
Price3	money		Level 3 selling price per UOM <i>13.00</i>
Price4	money		Level 4 selling price per UOM <i>12.00</i>
Price5	money		Level 5 selling price per UOM <i>11.00</i>
Price6	money		Level 6 selling price per UOM <i>10.00</i>
Price7	money		Level 7 selling price per UOM <i>9.00</i>
Price8	money		Level 8 selling price per UOM <i>8.00</i>
Price9	money		Level 9 selling price per UOM <i>7.00</i>
Price10	money		Level 10 selling price per UOM <i>6.00</i>

Tax Codes

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
SortOrder	Integer		Enter the sequential order in which you want this tax code to show up in the drop down. <i>10</i>
Code	AlphaNumeric	50	Enter a value for the Sales Tax Code that you want to see in the sales tax drop down. <i>IL</i>
Label	AlphaNumeric	50	Enter a label or title for the Sales Tax Code. <i>Illinois</i>
City	AlphaNumeric	100	Enter the name of the city for this tax code. <i>Chicago</i>
County	AlphaNumeric	50	Enter the name of the county for this tax code. <i>Cook</i>
State	AlphaNumeric	10	Enter the state for this tax code. <i>IL</i>
Zip	AlphaNumeric	15	Enter the zip code for this tax code. <i>60611</i>
IsPurchaseTax	AlphaNumeric	10	Please enter "ON" if this is a Purchase Tax too or leave Blank <i>on</i>
IsSalesTax	AlphaNumeric	10	Please enter "ON" if this is a Sales Tax too or leave Blank <i>on</i>
IsUseTax	AlphaNumeric	10	Please enter "ON" if this is a Active Tax too or leave Blank <i>on</i>
mtTaxItem	AlphaNumeric	50	Tax Item is the same as Sales Tax Code if the Sales tax is made of only one component. If the Sales Tax Code is made of multiple components then we need the different tax components as multiple Tax Items in multiple lines in this migration file. E.g. : Sales Tax could include City Tax and County Tax. <i>#####</i>
TaxItemID	Integer		This is the ID for the Tax Items. SPS will take care of this.

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Rate	Numeric		Rate is the tax percentage for this tax code. <i>7%</i>
EffectiveDate	smalldatetime		Date from which this tax code is effective. <i>3/1/2013</i>

Price List

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
ZipCode	AlphaNumeric	20	Zip code value. <i>60611</i>
mtTaxCodeID	AlphaNumeric	50	Tax code for this Zip code value. <i>IL</i>

Training Agenda

The training agenda will help you in scheduling and organizing the training sessions with SPS. Use the descriptions to decide who should be a part of each session. Also, use this section to write down the date and times that you have scheduled with SPS's Training Rep.

Note: *Static data migration must be completed before training begins.*

DATE/TIME	PARTICIPANTS/USERS	DESCRIPTION
___ / ___ / ___ :___	_____ _____ _____	Administration and Setup This session is intended for users that will be performing administrative/management tasks. <ul style="list-style-type: none">• System Setup• User Admin• Admin Tools
___ / ___ / ___ :___	_____ _____ _____ _____	Purchasing & Master List This session is intended for users that will be performing operational tasks such as purchasing inventory, product and services management, as well as suppliers and vendors. <ul style="list-style-type: none">• Product Master List• Supplier and Vendor Info• Purchasing Flow• Purchase Orders• Supplier Invoice/ Packing Lists• Freight Bills

DATE/TIME	PARTICIPANTS/USERS	DESCRIPTION
Call 1: ____ / ____ / ____ : ____	_____ _____ _____	Inventory This session will include information pertaining to inventory management <ul style="list-style-type: none"> • Product Master List • Inventory Search • Transfers • Physical Count • Inventory Adjustment
Call 2: ____ / ____ / ____ : ____	_____ _____ _____	
Call 1: ____ / ____ / ____ : ____	_____ _____ _____	Pre-Sales This session will be for users who will be a part of building quotations, creating holds, and managing sample orders. <ul style="list-style-type: none"> • Opportunities • Customer Visits • Sample Orders • Quotations • Inventory Holds • Products • Services and Packages
Call 2: ____ / ____ / ____ : ____	_____ _____ _____	
Call 1: ____ / ____ / ____ : ____	_____ _____ _____	Sales This session is intended for your sales representatives, and will go over sales orders and invoicing. <ul style="list-style-type: none"> • Sales Home • Customers and Products • Sale Orders • Dashboards • Pick Tickets • Packing List • Returns • Invoices
Call 2: ____ / ____ / ____ : ____	_____ _____ _____	
Call 3: ____ / ____ / ____ : ____	_____ _____ _____	

DATE/TIME

PARTICIPANTS/USERS

DESCRIPTION

Call 1:

___ / ___ / ___

___ : ___

Scheduling

Calendars and scheduling will be discussed in this training session.

- Scheduling Home
- Dashboards
- Calendar Views
- Resources
- Events & Event Types
- Daily Agenda

Call 2:

___ / ___ / ___

___ : ___

___ / ___ / ___

___ : ___

Accounting & Reports

This session will in compass the accounting module and reports.

- Accounts Receivable
- Accounts Payable
- Banking
- General Ledger
- Print Checks
- Bank Reconciliation
- Journal Entries

Print Formats (Common)

The following pages show examples of the printed documents that come from Stone Profit Systems. Please review these examples to make sure they will work for your company. If you have any changes or suggestions, mark/draw them directly on the examples. Once you have made the changes make a copy/scan and send it to your SPS contact.

Note: *The examples are not to scale, make changes based on information placement.*

Note II: *If there is a document not seen here please send us a copy to setup.*

- Purchase Order
 - Receiving Worksheet
 - Transfer Order
 - Sale Order
 - Pick Ticket
 - Packing List
 - Invoice
 - Deposit Slip
-



Stone Profits Demo
 445 E Ohio Street 350
 Chicago, IL 60611
 P: 866-858-1915 F: 312-803-0012

Receiving Worksheet #: 3

August 21, 2013

printed on Tuesday, September 24, 2013 08:58 am

Received At:
 Stone Profits Demo
 445 E Ohio Street 350
 Chicago IL 33172
 United States

Invoice #	PO #	Container #
	3	

Material	Slabs/Pieces	Quantity
Crema Bordeaux 3CM	49	2,563.54 SF

Serial Num	Lot/Block	Bundle	Spp. Ref	Invoiced Size	Measured Area	Notes	Bin	Net SF
3-1				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____
3-2				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____
3-3				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____
3-4				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____
3-5				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____
3-6				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____
3-7				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____
3-8				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____
3-9				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____
3-10				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____
3-11				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____
3-12				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____
3-13				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____
3-14				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____
3-15				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____
3-16				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____
3-17				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____
3-18				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____
3-19				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____
3-20				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____
3-21				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____
3-22				110" X 68" = 51.94 SF	____x____ = ____		BAY4	____

Received By: _____

Date: _____



Stone Profits Demo
 445 E Ohio Street 350
 Chicago, IL 60611
 P: 866-858-1915 F: 312-803-0012

Transfer - Pick Ticket #: 1

August 22, 2013

printed on Tuesday, September 24, 2013 09:00 am

Transferred From:
 Stone Profits Demo
 445 E Ohio Street 350
 Chicago
 P: 866-858-1915
 F: 312-803-0012
 F: support@stoneprofits.com

Transferred To:
 Stone Profits Demo2
 123 Demo Road
 Milwaukee
 P: 312-828-0601
 F: 312-803-0012
 F: support@stoneprofits.com

PriceLevel	Invoice Date	Ship(B/L) Date
Price6	Aug 22, 2013	

Description	SKU	Slabs	Quantity
Absolute Black Polished 3CM		1	55.00 SF
Serial Num	Barcode Num	Lot/Block	Bundle
1-4	DT15	123	110" X 72" = 55.00 SF
			_____ X _____
Uba Tuba 3CM		1	55.10 SF
Serial Num	Barcode Num	Lot/Block	Bundle
1-57	DT68	552	115" X 69" = 55.10 SF
			_____ X _____
Alaska White 3cm		2	56.78 SF
Serial Num	Barcode Num	Lot/Block	Bundle
1-87	DT98	6656	112" X 73" = 56.78 SF
			_____ X _____
1-88	DT99	6656	112" X 73" = 56.78 SF
			_____ X _____

Notes:

Sample Inventory Transfer

Picked By: _____

Stone Profits Demo
 445 E Ohio Street 350
 Chicago, IL 60611
 P: 866-858-1915 F: 312-803-0012

SaleOrder#: 13

Aug 23, 2013

printed on Tuesday, September 24, 2013 09:13 am

Bill To:
 XYZ Customer
 799 Opal Blvd
 Chicago IL 60611 United States
 P: 789-456-3322 / F: 789-456-4564
 E: Glenn@xyzcustomer.com

ShipTo:
 XYZ Customer
 799 Opal Blvd
 Chicago IL 60611
 P: 789-456-3322 / F: 789-456-4564

Sales Rep 1	PO #	Delivery Type	Job Name
administrator		Delivery	

Sales Rep 2	Freight Carrier	Payment Terms
		90 days

SKU	Description	Quantity	Unit Price	Extended
	Uba Tuba 3CM	181.26 SF	\$18.50	\$3,353.31

Serial Num	Barcode Num	Lot/Block	Bundle	Quantity
1-78	QP278	323232		116" X 75" = 60.42 SF
1-79	QP279	323232		116" X 75" = 60.42 SF
1-80	QP280	323232		116" X 75" = 60.42 SF

Terms and Conditions:

Sample Stone Co. warrants that: (i) it will provide its services hereunder in a professional and workmanlike manner; and (ii) the third parties with which it contracts to assist it in obtaining respondents for surveys are required by their agreements with Sample Stone Co. to comply with the federal CAN-SPAM Act. WITH THE EXCEPTION OF THE PRECEDING WARRANTY, Sample Stone Co. MAKES NO WARRANTY WITH RESPECT TO ANY MATTER INCLUDING, WITHOUT LIMITATION, ITS SERVICES AND DELIVERABLES HEREUNDER, AND EXPRESSLY DISCLAIMS ALL OTHER WARRANTIES, EXPRESS OR IMPLIED, INCLUDING, WITHOUT LIMITATION, THE IMPLIED WARRANTIES OF NONINFRINGEMENT, TITLE, MERCHANTABILITY, FITNESS FOR ANY PARTICULAR PURPOSE, AND ANY REPRESENTATION OR WARRANTY REGARDING THE PERFORMANCE, AVAILABILITY OR FUNCTIONALITY OF ANY ASPECT OF THE SERVICES OR DELIVERABLES HEREUNDER.

Sub Total: \$3,353.31
Tax(ALACHUA -ALACHUA 6%): \$201.20
Total: \$3,554.51
Balance Due: \$3,554.51



Stone Profits Demo
 445 E Ohio Street 350
 Chicago, IL 60611
 P: 866-858-1915 F: 312-803-0012

PickTicket #: 10009

August 23, 2013



printed on Tuesday, September 24, 2013 09:15 am

Bill to:
 XYZ Customer
 799 Opal Blvd
 Chicago IL 60611
 P: 789-456-3322 / F: 789-456-4564
 F: Glenn@xyzcustomer.com

ShipTo:
 XYZ Customer
 799 Opal Blvd
 Chicago IL 60611
 P: 789-456-3322 / F: 789-456-4564

Sales Rep 1	PO #	Delivery Type	Job Name
administrator		Delivery	

Sales Rep 2	Freight Carrier	SO #
		13

SKU	Description	Restriction	Quantity
	Uba Tuba 3CM	Slab	181.26 SF

Serial Num	Barcode Num	Lot/Block	Bundle	Quantity
1-80	QP280	323232		116" X 75" = 60.42 SF
1-79	QP279	323232		116" X 75" = 60.42 SF
1-78	QP278	323232		116" X 75" = 60.42 SF

Pulled By: _____

Checked By: _____

Date: _____

Stone Profits Demo
 445 E Ohio Street 350
 Chicago, IL 60611
 P: 866-858-1915 F: 312-803-0012

Packinglist #: 10002

August 20, 2013



printed on Tuesday, September 24, 2013 09:19 am

Bill to:
Za Zing Fabrications
 4468 Grand Ave Unit 5B
 Chicago IL 60625
 P: 312-456-7897 / F: 312457878
 F: info@zazing.com

ShipTo:
Za Zing Fabrications

Sales Rep 1	PO #	Delivery Type	Job Name	SO #
administrator		Delivery		6

Sales Rep 2	Freight Carrier	Payment Terms
	ABC Courier	Check/Cashiers Ck/Credit Card/Telecheck

SKU	Description	Quantity	Unit Price	Extended
	Alaska White 3cm	56.00 SF	\$15.00	\$840.00

Serial Num	Barcode Num	Lot/Block	Bundle	Quantity
1-115	DT126	6653		112" X 72" = 56.00 SF

Terms and Conditions:

Sample Stone Co. warrants that: (i) it will provide its services hereunder in a professional and workmanlike manner; and (ii) the third parties with which it contracts to assist it in obtaining respondents for surveys are required by their agreements with Sample Stone Co. to comply with the federal CAN-SPAM Act. WITH THE EXCEPTION OF THE PRECEDING WARRANTY, Sample Stone Co. MAKES NO WARRANTY WITH RESPECT TO ANY MATTER INCLUDING, WITHOUT LIMITATION, ITS SERVICES AND DELIVERABLES HEREUNDER, AND EXPRESSLY DISCLAIMS ALL OTHER WARRANTIES, EXPRESS OR IMPLIED, INCLUDING, WITHOUT LIMITATION, THE IMPLIED WARRANTIES OF NON-INFRINGEMENT, TITLE, MERCHANTABILITY, FITNESS FOR ANY PARTICULAR PURPOSE, AND ANY REPRESENTATION OR WARRANTY REGARDING THE PERFORMANCE, AVAILABILITY OR FUNCTIONALITY OF ANY ASPECT OF THE SERVICES OR DELIVERABLES HEREUNDER.

Sub Total: \$882.40
Tax(ALACHUA -ALACHUA 6%): \$50.40
Total: \$932.80
Check#: 10000: \$200.00
Balance Due: \$732.80

Customer: _____
 Signature: _____
 Date: _____



Stone Profits Demo
 445 E Ohio Street 350
 Chicago, IL 60611
 P: 866-858-1915 F: 312-803-0012

Invoice #: 10003

August 23, 2013

printed on Tuesday, September 24, 2013 09:21 am

Bill to:
Bloomers Construction
 137 Batavia St
 Benton IL 95266
 P: 700-805-8052 / F: 700-805-8055
 E: Benton@bloomersconstuction.com

ShipTo:
Bloomers Construction
 137 Batavia St
 Benton IL 95266
 P: 700-805-8052 / F: 700-805-8055

Sales Rep 1	PO #	Delivery Type	Job Name	SO #
administrator		Delivery		21

Sales Rep 2	Freight Carrier	Payment Terms	Due Date
		90 days	11/21/2013

SKU	Description	Quantity	Unit Price	Extended
	Crema Bordeaux 3CM	103.88 SF	\$19.00	\$1,973.72
Serial Num	Barcode Num	Lot/Block	Bundle	Quantity
3-23	QP376			110" X 68" = 51.94 SF
3-24	QP377			110" X 68" = 51.94 SF

Terms and Conditions:

Sample Stone Co. warrants that: (i) it will provide its services hereunder in a professional and workmanlike manner; and (ii) the third parties with which it contracts to assist it in obtaining respondents for surveys are required by their agreements with Sample Stone Co. to comply with the federal CAN-SPAM Act. WITH THE EXCEPTION OF THE PRECEDING WARRANTY, Sample Stone Co. MAKES NO WARRANTY WITH RESPECT TO ANY MATTER INCLUDING, WITHOUT LIMITATION, ITS SERVICES AND DELIVERABLES HEREUNDER, AND EXPRESSLY DISCLAIMS ALL OTHER WARRANTIES, EXPRESS OR IMPLIED, INCLUDING, WITHOUT LIMITATION, THE IMPLIED WARRANTIES OF NONINFRINGEMENT, TITLE, MERCHANTABILITY, FITNESS FOR ANY PARTICULAR PURPOSE, AND ANY REPRESENTATION OR WARRANTY REGARDING THE PERFORMANCE, AVAILABILITY OR FUNCTIONALITY OF ANY ASPECT OF THE SERVICES OR DELIVERABLES HEREUNDER.

Sub Total: \$1,973.72
Tax(ALACHUA -ALACHUA 6%):
\$118.42
Total: \$2,092.14
Balance Due: \$2,092.14

Print Formats (Distributors)

This section of print formats shows only those pertaining to distributors. Please review these examples to make sure they will work for your company. If you have any changes or suggestions, mark/draw them directly on the examples. Once you have made the changes make a copy/scan and send it to your SPS contact.

Note: *The examples are not to scale, make changes based on information placement.*

Note II: *If there is a document not seen here please send us a copy to setup.*

- Hold Letter Homeowner
 - Hold Letter Fabricator
 - Pre-Purchase Request
-



Stone Profits Demo
 445 E Ohio Street 350
 Chicago, IL 60611
 P: 866-858-1915 F: 312-803-0012
 www.stoneprofits.com

Hold #: 6
Aug 23, 2013

printed on Tuesday, September 24, 2013 09:28 am

Bill To:
 ABC Customer
 412 Chicago Ave.
 Unit 2B
 Chicago IL 60644
 United States
 P: 312-456-7894
 F: 312-987-6545
 E: info@abccustomer.com

Job / Home Owner:
 United States

Job / Home Owner	Expiry Date	Sales Rep	Sales Tax
	Sep 27, 2013	administrator	ALACHUA -ALACHUA 6%

Architect	Designer	General Contractor	Referred By

Thank you for visiting our facility recently. You have made a selection of the following material during your visit. We appreciate your business!

Description	Quantity
-------------	----------

Uba Tuba 3CM () 55.10 SF

Serial Num	Barcode Num	Lot/Block	Bundle	Spp. Ref	Quantity
1-62	DT73	552			115" X 69" = 55.10 SF

Uba Tuba 3CM () 55.10 SF

Serial Num	Barcode Num	Lot/Block	Bundle	Spp. Ref	Quantity
1-63	DT74	552			115" X 69" = 55.10 SF

Slabs will be held for 10 Days without payment. We will continue to hold slabs up to 60 Days with full payment. After 60 days, slabs will be returned to inventory and customers will be credited 90% of the payment.



Stone Profits Demo
 445 E Ohio Street 350
 Chicago, IL 60611
 P: 866-858-1915 F: 312-803-0012
 www.stoneprofits.com

Hold #: 6
Aug 23, 2013

printed on Tuesday, September 24, 2013 09:32 am

Bill To:
 ABC Customer
 412 Chicago Ave.
 Unit 2B
 Chicago Il 60644
 United States
 P: 312-456-7894
 F: 312-987-6545
 E: info@abccustomer.com

Job / Home Owner:
 United States

Job / Home Owner	Expiry Date	Sales Rep	Sales Tax
	Sep 27, 2013	administrator	ALACHUA -ALACHUA 6%

Architect	Designer	General Contractor	Referred By

Your customer recently visited our facility and made a visual selection of the following material:

Description	Quantity	Unit Price	Extended
Uba Tuba 3CM ()	55.10 SF	\$15.00	\$826.50
Serial Num	Barcode Num	Lot/Block	Bundle
1-62	DT73	552	
			115" X 69" = 55.10 SF
Uba Tuba 3CM ()	55.10 SF	\$15.00	\$826.50
Serial Num	Barcode Num	Lot/Block	Bundle
1-63	DT74	552	
			115" X 69" = 55.10 SF

Please send us a P.O. confirming the exact number of slabs you will require for this project. We appreciate your business!

Sub Total: \$1,653.00
Tax(ALACHUA -ALACHUA 6%): \$99.18
Total: \$1,752.18

Print Formats (Fabricators)

This section of print formats shows only those pertaining to fabricators. Please review these examples to make sure they will work for your company. If you have any changes or suggestions, mark/draw them directly on the examples. Once you have made the changes make a copy/scan and send it to your SPS contact.

Note: *The examples are not to scale, make changes based on information placement.*

Note II: *If there is a document not seen here please send us a copy to setup.*

- Quote
 - Quote With Options
 - Daily To Do
 - Shop Ticket
 - What To Expect
-



ABC Fabricators
 445 E ohio street Suite 350
 Chicago, IL 60610
 P: 312-828-0600

Quote# 1530 - 4
 Date: 7/21/2017
 printed on Tuesday, August 08, 2017 12:29 pm

Quote

Bill To:
Aldrich Woodworking PO BOX 1338 DAPHNE, AL 36526 P: 251-504-6163 E: bryan@sawgrassbuilders.net













Install At:
Aldrich Woodworking PO BOX 1338 DAPHNE, AL 36526 P: 251-504-6163

Sales Rep	Quote Name	Payment Terms	Expiry Date	
Kevin Galich	Aldrich Woodworking	COD	Aug 25, 2017	
Description		Quantity	Unit Price	Extended
Wall Botticino Fiorito 3cm / Half wall 3/8 BEVEL EDGE / Bevel Edge		20.00 SF	\$55.00	\$1,100.00
		4.00 SF	\$5.00	\$20.00
White Carrara 2Cm Bathroom 3		Subtotal		\$1,120.00
		12.00 SF	\$38.25	\$459.00

Terms and Conditions:
<p>Financing may be Available. Pricing is good for 20 days and contingent on all items being installed at the same time. Material pricing/ availability subject to change at the time of order. A 100% deposit is required upon acceptance and signing of this contract. Established accounts in good standing will maintain their credit terms. A minimum 15% restocking fee will apply on special order materials that are returned to the supplier. There is a \$50.00 fee for all NSF checks. The quote price is a cash/ bank note price. Other forms of payment, if accepted, will add a 3% processing fee.</p> <p>The prices, specifications and conditions listed above in the standard qualifications are satisfactory and are hereby accepted. Stone Interiors is authorized to perform scope of work as specified.</p>
Proposal/ Quote _____ Accepted by (sign above) _____ Date _____

Subtotal	\$1,579.00
Tax (LOX-LOXLEY 9%)	\$142.11
Total	\$1,721.11

Name: _____ Signature: _____ Date: _____

Jeff Curry		
<h1>1</h1> <p>Install 8:30 am Complete</p>	<p>SO# 80609 - 80609C HALL</p> <p> 6200 MORNING SIDE DR VANCLEAVE MS 39565 GC: (30.5178,-88.7129)</p> <p> 228-826-9080</p> <p> Michelle Fank</p> <p>\$: B&B Kitchen Cabinets, LLC</p>	<p>Internal Notes: 27866373- INITIAL PO \$2836.80</p> <p>Printed Notes: CHANGE ORDER: 1) SQFT INCREASED TO 63 SQFT 2) ADDED DISHWASHER BRACKETS 3) ADDED UNDERMOUNT SINK CUTOUT 4) ADDED BRACKET KIT- \$250 COST/ \$337.50 RETAIL ***PLEASE SEND ADDITIONAL PO IN THE AMOUNT OF \$730.60***</p>
<h1>2</h1> <p>Install 9:30 am Blank</p>	<p>SO# 80703 - 80703C WHEELER</p> <p> 526 LEMOYNE DR DAUPHIN ISLAND AL 36528 GC: (30.2606,-88.1127)</p> <p> 251-213-7448</p> <p> Michelle Fank</p> <p>\$: Royal Construction, Inc.</p>	<p>Internal Notes: 32842007 INI PO \$3160.00 32842008 INI PO \$867.02</p> <p>Printed Notes: CHANGE ORDER: 1) ALL MEASUREMENTS GOOD</p>
<h1>3</h1> <p>Install 12:30 pm Scheduled</p>	<p>SO# 80671 - KLUMPP</p> <p> 259 WESTWOOD ST. MOBILE AL 36606 GC: (30.6777,-88.0935)</p> <p> 251-222-1215 251-626-2628</p> <p> Kevin Galich</p> <p>\$: Phoenix Fixtures, Inc.</p>	<p>Internal Notes: 63437283 - 1669.26 INSTALL DATE 10/5</p> <p>Special Instructions: CUSTOMER TEAR OUT SINK ON SITE WALL TILE WILL STAY</p> <p>Activity Notes: LOOKS GREAT</p>
<h1>4</h1> <p>Install 2:00 pm Scheduled</p>	<p>SO# 80614 - KOCH</p> <p> 1932 CARDINAL LANE NAVARRE FL 32566 GC: (30.4073,-86.9488)</p> <p> 850-375-9065</p> <p> Kevin Galich</p> <p>\$: River City Tile</p>	<p>Internal Notes: 01477748 - \$2273.50 INSTALL DATE 10/5</p> <p>Printed Notes: CO 1 - DECREASE 3CM WHITE NORTH TO 48SF</p> <p>Special Instructions: CUSTOMER REMOVAL</p> <p>Activity Notes: INSTALLED BY BRANDON. CUSTOMER SAID TAPE TOOK VENEER OFF CABINET AND SEAM IS VERY NOTICABLE. HE IS STILL WAITING FOR DRAGON TO CALL HIM BACK. MADE A WORK ORDER AND GAVE COPY TO DRAGON AND KEVIN</p>



Stone Profit Systems - Chicago
 445 E ohio street Suite 350
 Chicago, il 60611
 P: 312-828-0600/312-420-0377 F: 312-803-0012
 www.stoneprofits.com

SaleOrder# 300003479
 Date: 8/7/2017

Shop Ticket

Bill To:
3AM HOLDING 12904 SW 103 COURT MIAMI, FL 33176

Ship To:
3AM HOLDING P: 305-772-0712 F: 305-255-1091

Project Manager	PO #	Payment Terms	Delivery Type	Weight				
		30 Days	Delivery	0 LBS				
Description						Quantity	Unit Price	Extended
Serial Number	Barcode	Lot	Crate	Supp Num	Location(Bin)			
2CM G771 ABSOLUTE BLACK (1)						42.01 SF	\$11.00	\$462.11
100004389-4	DT755920				CH	110" X 55" = 42.01		
2CM G771 ABSOLUTE BLACK (1)						42.01 SF	\$12.00	\$504.12
100004389-5	DT755921				CH	110" X 55" = 42.01		

Subtotal	\$966.23
Tax (BI-20 10%)	\$96.62
Total	\$1,062.85
Balance Due	\$1,062.85



Company Ltd.
515 E. Ohio Street
Chicago, IL, 60611
312-828-0600

SO # : 2541
Date : 1/17/2017

What to Expect: Countertop Installation

Job Name: Tiller, Tom - HDS.

Install At :

Install At:

HD - 3877 Mansfield
20 Circle Drive
Akron OH 44905
P: 344-449-0015
F: 344-445-4002
E: tiller@homedepot.com

Sales Rep	Payment Terms	Delivery Type	Project Manager
Unassigned	Net 30 days	Install	

ATTENTION CUSTOMER: Our goal is to deliver premium customer service to you, so in order to ensure a quality installation, we are asking that you review, agree to, and sign this checklist and statement of our policies as part of your order. **PLEASE READ** the following **CAREFULLY** and initial next to each item below to indicate your understanding and agreement. Thank you in advance for your assistance and cooperation with this effort.

Note: Granite, Marble, Limestone, Soapstone, Slate are referred to as "Natural Stone" and Silestone, Zodiaq, Caesar Stone is referred to as "Quartz" in this document.

MATERIAL

US / Cust

____/____ 1. **Characteristics of Natural stone and Quartz:** Customer acknowledges that natural stone and quartz products vary in gauging, coloration, shading, markings and texture. Thus, as uniqueness is an inherent characteristic in natural stone and quartz company

does NOT guarantee that all pieces will be consistently uniform. Natural stones are likely to have pits, fissures and dull spots. Various lighting conditions & installation planes will affect the appearance of the countertop surface. Natural stone slab thickness can vary by approximately 1/8". This does not mean that the stone is defective; it is a natural characteristic of natural stone and quartz products. Natural and engineered products may have fissures and may be filled with an epoxy resin.

____/____ 2. **Seams:** Placement of all required seams is at the discretion of the fabricator. Natural Stone and Quartz countertops will have visible seams and seam width will vary from stone to stone. company does not warranty seams that pop due to settling of the structure. A service charge will be necessary for resetting seams more than 90 days after installation.

____/____ 3. **Epoxy fill:** Customer acknowledges that, due to the nature of natural and quartz products, cracks and chips may occur which will be filled with a color matched epoxy resin during the fabrication and/or installation process. A professional installer or fabricator will repair and fill cracks, chips and breaks with an epoxy resin; company will not guarantee a top will be free of cracks as this is a normal course of operation in the stone industry. A repair will be made within professional standards in the industry.

____/____ 4. **Polish:** The final appearance of the polished surface of each type of natural stone or quartz is determined by the specific components or mix of quartz, feldspars and other material. While the overall appearance will be a high gloss finish (except in the case of honed surfaces), some components within the granite may not accept the same level of polish as the rest of the crystals, resulting in so called dull spots or watermarks.

____/____ 5. **Pitting:** A characteristic referred to as pitting may result from granite's crystalline structure, which can sometimes result in small spaces that form between the varying mineral crystals. In some instance, certain crystals may also be removed during the polishing process, causing the pits to become more visible. Pitting contributes to the stone's uniqueness and will not become worse over the passage of time.

____/____ 6. **Fissures:** Fissures are the natural result of the heating and cooling of stone during its formation millions of years ago. Fissures will not grow or expand over time and are natural veining characteristics to all natural stones; some stones may have more fissures than others depending upon the mineral composition.

____/____ 7. **Vein direction:** During the cutting process, company will consider the vein direction and will attempt to produce the finished product with vein patterns running in one direction. Customer acknowledges that due to the variety, size and inherent characteristics of the stone (i.e. avoiding cracks), consistent vein direction may not be achieved in some areas.

PREPARATION AND TEMPLATING

company will call to schedule the templating and installation date within 48 hours of your order. The installation date generally occurs within 14 business days of the template date, providing the natural stone/quartz is in stock at company. Prior to templating the items listed below must occur:

Bar-Code Labels

This section will discuss the information you need to start printing bar-codes for your inventory as soon as possible.

- Recommended Media/Printer
 - Bar-Code Setup
 - Bar-Code Printout Example *Note: Example is not to scale.*
-

Recommended Media/Printer

Bar-code Sheet Media

SPS offers a plastic tag material in letter size that has 22 pre-cut labels per sheet. Bar-codes can be printed on to media using any office laser printer.



Laser Printers

SPS recommends the use of any laser printer. It can be black and white or color. Laser Printers are recommended for the speed in which documents can be printed, and because the ink/toner does not smear on media.



Smart Label Printer 440

Seiko Instruments USA Inc.
labelprinters.sii-thermalprinters.com



Bar-Code Setup

Product Type Label Templates

Barcode label templates can be set up for each product type (Slab, Tile, Prefab, etc.) that you define in the system setup. The system also allows you to set multiple product types to one template. Each template can show different information or be set to print differently.

Configure Printed Information

SPS gives you the ability to configure the information you want to show on each barcode. See the list below to see what information can be put on the bar-code labels.

_____	SKU	_____	Bundle #
_____	Quantity	_____	Company Logo
_____	Unique ID	_____	Supplier Reference #
_____	Product Name	_____	Picking Units
_____	Bar-Code ID#	_____	Packaging Details
_____	Lot #	_____	Supplier Code
_____	Size/Dimensions		

Print Setup

The print setup determines how the bar-codes will print onto the desired media. The following information is the setup for Stone Profit System's bar-code label media (example on the next page). If you choose to use a different media these are the configurations that can be adjusted.

Note: The alignment of the print out to the bar-code sheet may vary from printer to printer. Some minor adjustments may need to be made.

<u>8.5</u>	Paper/Sheet Width	<u>.125</u>	Space Between Rows
<u>11</u>	Paper/Sheet Height	<u>3.875</u>	Label Width
<u>.75</u>	Paper/sheet Top Margin	<u>.75</u>	Label Height
<u>.375</u>	Paper/sheet Left Margin	<u>.125</u>	Left and top margins (within label)
<u>2</u>	Columns Per Page	<u>150</u>	Number of Characters on Label
<u>1</u>	Rows Per Page	<u>30</u>	Barcode height (in pixels)
<u>0</u>	Space Between Columns	<u>65</u>	Logo Size (in pixels)




1 - 1/ (123)/ Absolute Black Polished 3CM




1 - 2/ (123)/ Absolute Black Polished 3CM




1 - 3/ (123)/ Absolute Black Polished 3CM




1 - 4/ (123)/ Absolute Black Polished 3CM




1 - 5/ (123)/ Absolute Black Polished 3CM




1 - 6/ (123)/ Absolute Black Polished 3CM




1 - 7/ (123)/ Absolute Black Polished 3CM




1 - 8/ (123)/ Absolute Black Polished 3CM




1 - 9/ (123)/ Absolute Black Polished 3CM




1 - 10/ (123)/ Absolute Black Polished 3CM




1 - 11/ (124)/ Absolute Black Polished 3CM




1 - 12/ (124)/ Absolute Black Polished 3CM




1 - 13/ (124)/ Absolute Black Polished 3CM




1 - 14/ (124)/ Absolute Black Polished 3CM




1 - 15/ (124)/ Absolute Black Polished 3CM




1 - 16/ (124)/ Absolute Black Polished 3CM




1 - 17/ (124)/ Absolute Black Polished 3CM




1 - 18/ (124)/ Absolute Black Polished 3CM




1 - 19/ (124)/ Absolute Black Polished 3CM




1 - 20/ (124)/ Absolute Black Polished 3CM




1 - 21/ (125)/ Absolute Black Polished 3CM




1 - 22/ (125)/ Absolute Black Polished 3CM

Bar-Code Scanner Options

Motorola CS4070

Batch mode

<https://www.zebra.com/>



Motorola CS4070

Paired with tablet via Bluetooth

<https://www.zebra.com/>



Saveo Scan RCCD-BH

Paired with Apple or Android Smart phone

<http://www.saveoscan.com>



NOTE: The Scanners above are meant to be examples. Please check with Stone Profit Systems to learn the current recommendations.

Hold Labels

This section will discuss the information you need to start printing hold labels for your inventory as soon as possible.

- Recommended Media/Printer
 - Hold Label Setup
 - Hold Label Printout Example *Note: Example is not to scale.*
-

Recommended Media/Printer

Smart Label Printer 440

Seiko Instruments USA Inc.

labelprinters.sii-thermalprinters.com



Hold Label Media

Seiko Instruments USA Inc.

labelprinters.sii-thermalprinters.com

Model: White SLP-MPL4

Dimensions: 2-1/8" x 4"

Labels per Roll: 220



Bulk Label Trey

Seiko Instruments USA Inc.

labelprinters.sii-thermalprinters.com

Allows for label roll of 900

Label model: SLP-SRLB



Hold Label Setup

Configure Printed Information

SPS gives you the ability to configure the information you want to show on each hold label. See the list below to see what information can be put on the bar-code labels.

_____	Hold #	_____	Hold Barcode
_____	Expiry Date	_____	Customer Name
_____	Customer Code	_____	Contact
_____	Job/Homeowner	_____	Item Name
_____	Item SKU	_____	Serial Number
_____	Lot #	_____	Bundle #
_____	Supplier Reference #	_____	Quantity

Print Setup

The print setup determines how the hold labels will print onto the desired media. The following information is the setup for Stone Profit System's bar-code label media (example on the next page). If you choose to use a different media these are the configurations that can be adjusted.

Note: The alignment of the print out to the bar-code sheet may vary from printer to printer. Some minor adjustments may need to be made.

<u>4</u>	Sheet/Roll Width	<u>2</u>	Sheet/Roll Height
<u>.125</u>	Paper/Roll Top Margin	<u>0</u>	Paper/Roll Left Margin
<u>1</u>	Columns per Page/Roll	<u>1</u>	Rows Per Page (if roll enter 1)
<u>0</u>	Spacing Between Columns	<u>0</u>	Spacing Between Rows
<u>4</u>	Individual Label Width	<u>2</u>	Individual Label Height
<u>.125</u>	Left and Top Margin (within label)	<u>150</u>	Total Characters
<u>30</u>	Barcode Height		

HOLD	Hold:	Contact:
	147	
	Hold Date:	Contact Info:
	May 15, 2013	305-545-8588
Expires:	Serial Num:	Barcode Num:
Jun 19	12517-15	DT22381
Customer:	Product (SKU):	
MISC Miami Stone	2cm ubatuba rhinestone(Ubarh2)	
Home Owner:	Lot/Block:	Size:
Sam		118" x 58"
There is 1 other slab/product on this hold		

Dynamic Data Migration File Formats

For dynamic data migration Stone Profit Systems will be sending you Excel files listing the information needed for each item to be migrated. There will be an Excel file for each of the migration types listed below. With these files you will fill/paste your information in the designated columns. The following pages in this book have the data fields listed out with descriptions and examples to help you provide SPS with the appropriate information.

Note: *Dynamic data will be required after the completion of the Static Data and should be worked on simultaneously to training. Dynamic data files are due the Friday before your go live date.*

HAVE FILES	# OF ENTITIES	STATIC MIGRATION TYPES
_____	_____	Inventory In-Stock
_____	_____	AR Invoices
_____	_____	AR Receipts
_____	_____	AP
_____	_____	Trial Balance
_____	_____	Schedule
_____	_____	CRM Events
_____	_____	Files

Inventory In-Stock

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
ItemTypeValue	AlphaNumeric	50	Enter the value for the product type for this Inventory line. <i>SLAB / Tile</i>
IsIndivisibleItem	AlphaNumeric	10	Enter "on" if quantity from this inventory line cannot be sold partially. Has to be 'on' for Slab lines. The system is configured in all modules to not be able to select partial quantities if this field is set to 'on'. <i>on</i>
mtInventoryAccount	AlphaNumeric	50	Enter the inventory asset account number that gets debited for the value of this inventory line. <i>5040</i>
mtCurrentLocation	AlphaNumeric	50	Enter the name of the Location of the warehouse at which this inventory is currently located at. <i>Chicago</i>
mtItem	AlphaNumeric	150	Enter the name of the material this inventory belongs to. The material name has to match exactly to the name given in the item file. <i>Black Absolute 3cm</i>
CurrentSlabLength	Numeric	2 decimal places	Current length of the Slab. Leave blank for other types of products. <i>113.00</i>
CurrentSlabWidth	Numeric	2 decimal places	Current width of the Slab. Leave blank for other types of products. <i>69.00</i>
ReceivedLength	Numeric	2 decimal places	Length of the Slab as of the received date. Leave blank for other types of products. <i>113.00</i>
ReceivedWidth	Numeric	2 decimal places	Width of the Slab as of the received date. Leave blank for other types of products. <i>69.00</i>
CurrentQuantity	Numeric	2 decimal places	Current Quantity in stock for the Inventory Line. <i>54.15</i>
Quantity	Numeric	2 decimal places	Current Quantity in stock for the Inventory Line. <i>54.15</i>

UOM	AlphaNumeric	50	Unit of measure for the product. <i>SF</i>
UnitPrice	decimal(18, 2)	2 decimal places	Unit landed cost for the inventory line. <i>4.45</i>
Extended	decimal(18, 2)	2 decimal places	Total landed cost for the inventory line. <i>240.97</i>
SerialPrefix	AlphaNumeric	50	The prefix for the serial number of the inventory line. <i>IM</i>
SerialNumber	AlphaNumeric	50	The serial number of the inventory line. <i>1 / 2 / 3 / 4 / 5</i>
SupplierBarcodeID	AlphaNumeric	50	Barcode ID or Barcode number for the inventory line in the previous system. <i>IM-1 / IM-2</i>
IDOne	AlphaNumeric	50	Additional information for the inventory item. E.g. : Lot# / Block# / Bundle # / Supplier Reference# / Supplier Code etc. <i>C1012</i>
IDTwo	AlphaNumeric	50	Additional information for the inventory item. E.g. : Lot# / Block# / Bundle # / Supplier Reference# / SupplierCode etc. <i>25</i>
IDThree	AlphaNumeric	50	Additional information for the inventory item. E.g. : Lot# / Block# / Bundle # / Supplier Reference# / SupplierCode etc. <i>ASD256</i>
IDFour	AlphaNumeric	50	Additional information for the inventory item. E.g. : Lot# / Block# / Bundle # / Supplier Reference# / SupplierCode etc. <i>C1012</i>
IDFive	AlphaNumeric	50	Additional information for the inventory item. E.g. : Lot# / Block# / Bundle # / Supplier Reference# / SupplierCode etc. <i>ASD256</i>
Bin	AlphaNumeric	50	Exact bin Location of the inventory line within the warehouse. <i>MS021</i>
Mnote1	AlphaNumeric	500	Any notes in the previous system on this inventory line.

AR Invoices

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtCustomer	varchar(150)	150	Enter the name of the billing customer on the invoice. The name of the customer must match exactly to the name given in the customer file. <i>12081 / American Granite AND Marble</i>
TransactionNumber	varchar(50)	50	Invoice number or the credit memo number. <i>1016688</i>
TransactionDate	Date		Transaction date on the invoice or credit memo. <i>1/1/2013</i>
DueDate	Date		Due date for this transaction. <i>1/31/2013</i>
Amount	Numeric	2 decimal places	Open Balance or Credit on this transaction rounded to 2 decimals. <i>25000.25</i>
mtLocation	varchar(50)	50	Enter the location or profit center that this transaction is a part of. <i>Chicago</i>
mtPaymentTerms	varchar(50)	50	Payment terms on this invoice. <i>30 Days</i>

AR Invoices

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtCustomer	AlphaNumeric	150	Enter the name of the billing customer on the open receipt or deposit. The name of the customer must match exactly to the name given in the customer file. <i>ABC Customer</i>
TransactionNumber	AlphaNumeric	50	Transaction number for the open receipt or deposit. <i>125252</i>
TransactionDate	Date		Transaction date for the open receipt or deposit. <i>1/1/2013</i>
Amount	Numeric	2 decimal places	Amount on the open receipt or deposit rounded to 2 decimals. <i>1256.50</i>

AP

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtPartyName	AlphaNumeric	150	Enter the name of the supplier / vendor on the invoice. The party name must match exactly to the name given in the supplier or vendor file. <i>Freight Company</i>
TransactionNumber	AlphaNumeric	50	Invoice number or the credit memo number. <i>1016688</i>
TransactionDate	Date		Transaction date on the invoice or credit memo. <i>1/1/2013</i>
DueDate	Date		Due date for this transaction. <i>1/31/2013</i>
Amount	float	2 decimal places	Open payable or Credit on this transaction rounded to 2 decimals. <i>750.00</i>
mtLocation	AlphaNumeric	50	Enter the location or profit center that this transaction is for. <i>Chicago</i>
mtPaymentTerms	AlphaNumeric	50	Payment terms on this transaction. <i>30 Days</i>

Trial Balance

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtAccountNumber	AlphaNumeric	50	Enter the account number for which there is a debit or credit balance. <i>100262</i>
mtAccountName	AlphaNumeric	200	Enter the name of the account for which there is a debit or credit balance. <i>Prepaid Expenses</i>
AccountID	AlphaNumeric	50	Account ID for this account. Entered by SPS.
Debit	Numeric	10	Debit balance if any, rounded to 2 decimals. <i>15500.00</i>
Credit	Numeric	10	Credit balance if any, rounded to 2 decimals. <i>15500.00</i>

Schedule

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtLocation	AlphaNumeric	50	Activity Created Location <i>Chicago</i>
TransactionNumber	AlphaNumeric	50	Activity associated Transaction Number, If transaction is a job then provide the associated Job Number here. <i>45422</i>
Type	AlphaNumeric	50	Type of Activity's transaction <i>Transaction/Generic Activity</i>
SubType	AlphaNumeric	50	Transaction Sub Type <i>Saleorder/Quote</i>
EventType	AlphaNumeric	50	Type of Activity <i>Template/Install/Contract</i>
mtEventCategory	AlphaNumeric	50	Stage Name <i>Initial Order/Production/Install</i>
mtActivity	AlphaNumeric	80	Name of activity that is to be scheduled. <i>Template/Install/Sawing/Edge Polishing/Finishing</i>
mtScheduledBy	AlphaNumeric	60	This explains who scheduled the activity <i>any user in the system (administrator/Scheduler)</i>
ScheduleDate	Date		Activity Scheduled Date <i>7/24/2017</i>
ScheduledStartTime	AlphaNumeric	50	Activity Scheduled Start Time <i>10:00 AM</i>
ScheduledEndTime	AlphaNumeric	50	Activity Scheduled End Time <i>12:00 PM</i>
mtScheduledResource	AlphaNumeric	40	Assignee Name, any resource assigned to the activity in the system. <i>Install Team/ Fred/Templetor</i>
mtStatus	AlphaNumeric	50	Status of Activity <i>Estimate/InProgress/Confirmed/Completed</i>
mtCompletedBy	AlphaNumeric	40	Activiy Completed User name <i>User in the system that marked status</i>

CompletedDate	Date		Activity Completed Date <i>7/24/2017</i>
InternalNotes	AlphaNumeric	1000	Internal Activity Notes <i>Homeowner missed last appointment</i>
PrintedNotes	AlphaNumeric	1000	Printable Activity Notes <i>Homeowner will be home after 2pm</i>
Createdon	Datetime		Activity Created Date and time <i>7/24/2017 10:00 AM</i>
mtCreatedBy	AlphaNumeric	50	Activity Created By User Name <i>administrator/scheduler/Beth</i>
mtUpdatedBy	AlphaNumeric	50	Activity Update By User Name <i>administrator/scheduler/Beth</i>
Updatedon	Datetime		Activity Update On <i>7/24/2017 10:00 AM</i>
mtOtherAssignees	AlphaNumeric	200	Other Assignees linked to this activity <i>resources (Install Team/ Fred/ Templetor)</i>
ScheduleEndDate	Date		Activity Scheduled End Date <i>7/24/2017</i>
CompletedEndDate	Date		Activity Completed End Date <i>7/24/2017</i>
mtSubHeading	AlphaNumeric	50	Package Name linked to this activity <i>Kitchen/Vanity/Island</i>
Address	AlphaNumeric	500	Address - Option to provide address in generic activity <i>445 E. Ohio Street</i>
Address2	AlphaNumeric	500	Address2 - Option to provide Suite # in generic activity <i>Suite 350</i>
City	AlphaNumeric	20	City - Option to provide city in generic activity <i>Chicago</i>
State	AlphaNumeric	20	State - Option to provide state in generic activity <i>IL</i>
Zip	AlphaNumeric	50	Zip - Option to Provide Zip in generic activity <i>60611</i>

Country	AlphaNumeric	50	Country - Option to Provide Country of a generic activity <i>United States</i>
Phone1	AlphaNumeric	20	Allowed to give Phone number in generic activity <i>312-828-0600</i>
Mobile	AlphaNumeric	20	Allowed to give Mobile number in generic activity <i>312-828-0600</i>
Email	AlphaNumeric	50	Allowed to give Email in generic activity <i>support@stoneprofits.com</i>
Fax	AlphaNumeric	20	Allowed to give FAX in generic activity <i>312-803-0012</i>
Url	AlphaNumeric	150	Allowed to give URL in generic activity <i>www.stoneprofits.com</i>
NotifyTo	AlphaNumeric	150	Users to be notify on each level of this activity. If more that one add them with a seperator "," <i>Users in the System(administrator, scheduler, beth)</i>

Schedule

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
Source	AlphaNumeric	50	Source of file, Transaction where it should attach <i>SIPL/Customer/Vendor/SaleOrder/Presale</i>
SubSource	AlphaNumeric	50	Sub Source of file <i>If Source is SIPL then Sub Source will be Slab Or Lot</i>
mtCustomer	AlphaNumeric	250	If Customer Logo got uploaded then Provide name of the customer here <i>ABC Granite Company</i>
mtItem	AlphaNumeric	250	If you have to upload Item image then provide the item name belongs to the image <i>Absolute Black 3cm</i>
TransactionNumber	AlphaNumeric	50	If file belongs to a transaction then provide the transaction number. <i>If transaction is a sales order then provide the associated Sales Order Number here</i>

IDOne	AlphaNumeric	50	Depends upon the customer IDOne label may vary. Here we are considering it as Lot# <i>LOT-123</i>
IDTwo	AlphaNumeric	50	Depends upon the customer IDTwo label may vary. Here we are considering it as Block# <i>10483</i>
IDThree	AlphaNumeric	50	Depends upon the customer IDThree label may vary. Here we are considering it as Bundle# <i>40831</i>
Filename	AlphaNumeric	150	<i>Name of the file</i> <i>Absolute_Black.jpg/Countertop Drawing</i>
Notes	AlphaNumeric	500	Any additional information about this file. <i>Notes relevent to the file</i>
BarcodeID	AlphaNumeric	200	Barcode Number <i>DT468500</i>
SerialPrefix	AlphaNumeric	100	Inventory Series number <i>100002578-1</i>

CRM Events

FIELD NAME	DATA TYPE	LENGTH	DESCRIPTION/EXAMPLE
mtSubType	AlphaNumeric	50	Sub type of the of Event <i>Customer/Employee/Event/Hold/Item/Opportunity</i>
Title	AlphaNumeric	100	Title of the Event <i>Pick Sample for Sample Order# 11579-1/Homeowner</i>
mtCustomer	AlphaNumeric	250	If Customer created an Event provide name of the customer here <i>ABC Granite Company</i>
mtItem	AlphaNumeric	250	Name of an Item associated to an event <i>Absolute Black 3cm</i>
TransactionNumber	AlphaNumeric	50	If Event belongs to a transaction then provide the transaction number <i>If transaction is a sales order then provide the associated Sales Order Number here</i>
Description	AlphaNumeric	8000	Provide detailed description about the event <i>Need to make a follow up call regarding product selection</i>

Amount	Decimal	9	Enter the amount for an event <i>\$1000.00</i>
Date	Date		Option to Enter schedule date of an event <i>7/24/2017</i>
Time	AlphaNumeric	20	Option to Enter schedule time of an event <i>10:00 AM</i>
mtUpdatedBy	AlphaNumeric	50	Event Updated by Username <i>USer in the system (administrator/SalesRep)</i>
mtUpdatedOn	DateTime		Event Updated on <i>7/24/2017 10:00 AM</i>
mtCreatedBy	AlphaNumeric	50	Event Created by Username <i>USer in the system (administrator/SalesRep)</i>
CreatedOn	DateTime		Event Created on <i>7/24/2017 10:00 AM</i>
CreatedTime	AlphaNumeric	20	Event Created Time <i>10:00 AM</i>
mtAssignedTo	AlphaNumeric	250	Other Assignees linked to this activity <i>USer in the system (administrator/SalesRep)</i>
ReadOn	DateTime		Event completed time <i>7/24/2017 10:00 AM</i>
mtEventType	AlphaNumeric	50	Enter type of an event already added in System Settings <i>Message/Follow UP/Collection Call</i>
PartyContact	AlphaNumeric	100	Customer Contact Name provided as Customer Contacts in SPS <i>Jerry Smith</i>
DueDate	Date		Event Due Date <i>7/24/2017</i>
ClosedTime	AlphaNumeric	50	Event Closed Time <i>10:00 AM</i>
JobName	AlphaNumeric	250	Job Name <i>Smith Kitchen</i>
ClosedDate	Date		Event Closed Date <i>7/24/2017</i>

Client Machine Tips

This section will cover various options/situations that you might encounter on each computer while you are starting out.

- Recommended Browser
 - Browser Print Options
 - Remote Support Setup
 - Product Image size
 - Minimum Hardware
 - Minimum Software
 - Network Requirements
 - Domain Requirements
 - Tablet / Mobile Devices
-

Recommended Browser Installation

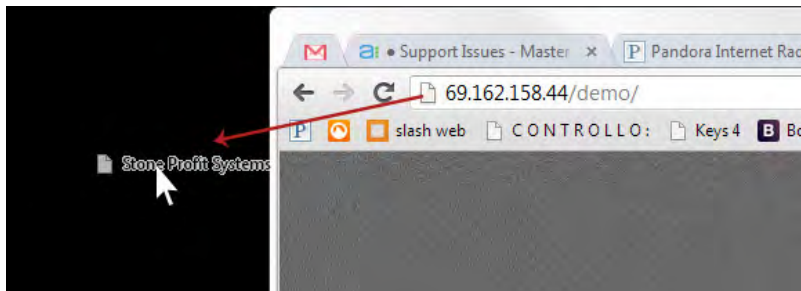
Google Chrome

Every web browser is slightly unique in the way that they respond to programming. One function can work perfectly in one browser and not work at all in the next. SPS has worked hard to make the system compatible across all browsers, but we have found that the system works best in Google Chrome.

To install Google Chrome (if not already there) Go to www.google.com/chrome. Once you have reached the web-page click the blue button that says “Download Chrome,” and follow the computers instructions to install.

Create a Shortcut to Your System

Once your system is installed on the server you will be given a URL. For ease of access we recommend that a shortcut is created on each computer. To do this, navigate to your system by entering the URL. Once you are at the login page, locate the icon just before the web-address in the address bar. Click and drag this icon to your desktop. See images below for reference.



Browser Print Options

The screenshot shows a 'Print' dialog box with the following sections and settings:

- Print** (button) and **Cancel** (button)
- Total: 2 sheets of paper**
- Destination:** XRX_9C934E15575F PS (with a printer icon and a 'Change...' button)
- Pages:** All (with a text input field containing 'e.g. 1-5, 8, 11-13')
- Copies:** 1 (with '+' and '-' buttons)
- Layout:** Portrait, Landscape
- Color:** Color, Black and white
- Margins:** Default (dropdown menu)
- Options:** Headers and footers, Two-sided, Background colors and images
- Print using system dialog... (Ctrl+Shift+P)** (link)

Blue lines with dots at the end point from the text on the right to the corresponding settings in the dialog box.

Printing From Google Chrome

When you select to print a document from Stone Profit Systems you will see options like the example on the left. Below are some tips to make sure the settings are correct before you print.

Make sure you have selected the desired printer

Select all or designate specific pages to print. (all is default option)

Input desired number of copies

Make sure layout is set to "Portrait"

Margins should be set to "Default"

Make sure "Headers and Footers" is turned off

Remote Support Setup

Remote Support Options

At various points of time Stone Profit Systems may be required to connect remotely to your computer for support or training purposes. When this occurs you will be asked to use one of the following software.



GoTo Meeting

SPS uses this software mostly for training purposes. It creates a connection between 2 or more computers that allows them to view the screen of one of the computers connected. SPS will create a meeting and you will be asked to do the following:

- Navigate to www.joingotomeeting.com.
- SPS will give you a 9 digit meeting ID that you will enter in the field and click continue.
- Your computer will download a file. Open that file and click run.
- Once the application is running you will be in the meeting.

If multiple people are in the meeting you might also be given a phone number for the meeting. Dial this number and you will be connected to a conference call.

A screenshot of a web form for joining a GoTo Meeting. The form has a light gray background and rounded corners. At the top, it says "To connect to an online meeting, enter the meeting ID provided by the meeting organizer." Below this text is a label "Meeting ID" followed by a white rectangular input field with a thin yellow border. To the right of the input field is a blue button with white text that says "Continue".

GoTo Assist

This option will be used for quick support calls. GoTo Assist creates a remote connection from the SPS computer to your computer, allowing SPS to see your screen, and control your computer. SPS will create the session and instruct you to do the following:

- Navigate to www.fastsupport.com
- Enter your name/company name in the name field.
- SPS will give you a 9 digit support key. Enter it into the support key field and select continue.
- Your computer will download the application.
- Click “yes” to allow the software to make changes.
- Click “yes” when asked if you would like to join session.



The screenshot shows a web form titled "Establish Support Connection". Below the title, there is a horizontal line and a paragraph of instructions: "Type your name and the Support Key received from your Technician and click Continue to proceed." Below this text are two input fields: "Your Name:" followed by a text box containing a vertical cursor, and "Support Key:" followed by an empty text box. To the right of these fields is a blue button with the text "Continue >>". At the bottom right of the form, there is a logo consisting of a gear with a blue circle inside, followed by the text "Powered by GoToAssist®".

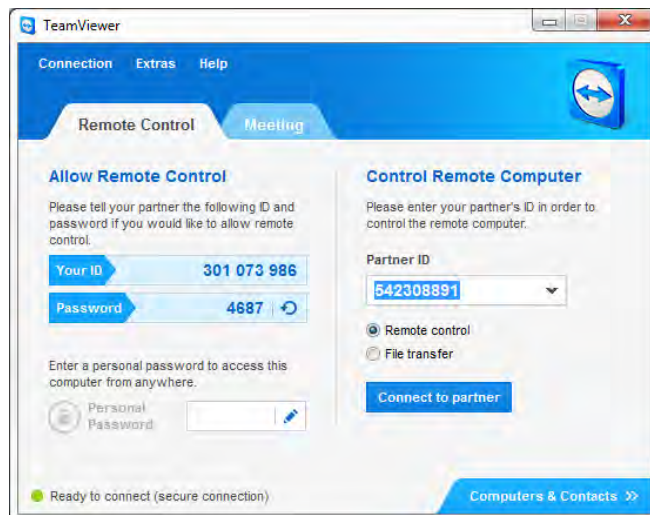
Team Viewer

This option will be used during the initial setup as well as support calls. Once this application is downloaded and installed it will stay on your computer making it easy and quick for SPS to establish a connection.

- Navigate to www.teamviewer.com
- Click on green download button in the center of the page.
- Your computer will download the application.
- Open the application instal file, and click “run.”
- Select the way in which Team Viewer should operate. SPS recommends “install.”
 - Install - this option will install the application to your computer. Next time you need to use it you would not have to download.
 - Run - this option will run the application without installing it. Once you have finished the session the application will no longer be there.
- Click yes to allow Team Viewer to make changes to your computer.
- Select “Personal / non-commercial use”
- Accept the terms and agreements, and click “next”.
- Select “No” and click “next”.
- Application will install.

At this point the application is installed. You will now be able to establish a remote connection with SPS by opening Team Viewer and following the instructions bellow.

- You will see a 9 digit number labeled “Your ID”. Give this number to the SPS team member.
- Provide them with the password when asked.



Product Image Size

Image Sizes

Stone Profit Systems allows you to upload photos for each product, lot, and individual slabs. This can be useful to create an image library for all your products so you can have intercompany reference, and the ability to send your customers images through e-mail. Also, If you plan on using the web connect module these images can be pushed to your web site instantly creating a web friendly product index.

To upload image to the system it is important to have the images meet size restrictions as well as retain quality of the image. In most cases you will not be able to upload the images directly from your camera. Typically cameras take pictures and save them with large file sizes that will be too large to upload. To repair this you will need to re-size all the images to make them suitable for use on the web.

Acceptable Sizes

- 1024x768 pixels (maximum)
 - 800x600 pixels (Recommended)
 - 640x480 pixels
 - 512x384 pixels (minimum)
- The resolution for each of the dimensions is 72dpi.
 - File size should be Under 200KB
 - The aspect ratio or proportions may differ from your photo. In that case, adjust image proportionally to the width.
 - If image needs to be cropped, crop the image to the desired dimensions.
 - If adjusting/cropping manually, constrain proportions by holding shift key.

Minimum Hardware for All Client Computers

The minimum hardware that is required to install and run SPS Quantum includes:

ITEM	REQUIREMENT
Processor	Intel Pentium/Celeron family or compatible Pentium III Xeon or higher processor minimum 1.4 GHz or higher recommended
RAM	2GB RAM or More recommended
Monitor	Super VGA (1024 x 768) or higher resolution monitor
Communications	DSL or higher quality connection is required to access the application via an internet browser.

Software Requirements for All Client Computers

The following software must be present on the computer for SPS Quantum to be accessed.

REQUIREMENT	Notes
Google Chrome 10.0.612 or higher	Web browser clients can run on many operating systems. However, those configurations are supported only for issues that can be reproduced when the browser is running on an operating system that is supported for SPS Quantum.
Internet Explorer 9.0	
Mozilla Firefox 3.5 or higher	
Safari 4.1.3 or higher	
2007 Office release, Service Pack 2 or 2010 Office release	

Supported Client Operating Systems

OPERATING SYSTEM	Notes
Windows 7 Professional edition, Home Edition, Ultimate edition, or Enterprise Edition	Both 32-bit and 64-bit versions of Windows 7 are supported.
Windows Vista Business Edition, Home Edition, Ultimate Edition or Enterprise Edition with Service Pack 2	Both 32-bit and 64-bit versions of Windows Vista are supported.
Windows XP Professional Edition, Home Edition	Both 32-bit and 64-bit versions of Windows XP are supported.

Network Requirements

In the table below are the minimum network requirements for connection between the client and the SPS Quantum application server (QAS) as well as the connection between the SPS QAS and the database servers.

VALUE	CLIENT TO QAS	QAS TO DATABASE
Bandwidth	DSL or higher quality connection	100mps
Latency		Less than 5 Milliseconds

We recommend that you consider the following types of connections when planning your system:

- For a system that uses a local area network (LAN) or wide area network (WAN), connect by using IP restricted access to the IP address of the server that is setup as a web site in Internet Information Services. SPS Quantum can operate on networks that use Internet Protocol Version 4 (IPv4) or Internet Protocol Version 6 (IPv6).

Domain Requirements

Consider the following domain requirements when you install SPS Quantum:

- Computers that are running SPS Quantum must have access to the server on which the SPS Quantum system has been setup in IIS.

Tablet / Mobile Device Options

Apple iPad, iPad Mini, iPhone, iPod Touch

<http://www.apple.com/ipad/>



Google Nexus 4, 7, and 10

https://play.google.com/store/devices?feature=corpus_selector



Samsung Galaxy Tab and Note

<http://www.samsung.com/us/mobile/galaxy-tab>



Windows Surface

<http://www.microsoft.com/Surface/en-US>

