

# Getting Started with New Home Management System (NHMS)

Pre-Training Dealer Preparation

## Personnel to Select for Training (Times Stated are in addition to Overview)

- Primary Personnel – System Users
  - Database Manager – Full Training
  - Backup Database Manager – Full Training
  - Design Center Scheduler – Half Day
  - Designers – Half Day
- Secondary Personnel – Will be providing data for system or using system output
  - Salespeople – Half Day
  - Estimators / Sizers – Half Day
  - Order Entry – 2 Hours
  - Product Entry – 2 Hours

## Information to Gather & Prepare – Getting Started Forms

- RFMS Product & Labor Files ready for product export to NHMS
- Additional Start Up Data
- Project ready to be entered into the system

## Hardware & Network Requirements – Based on your size & planned use of system

- Fill out Getting Started information
- Additional Pervasive Licenses if needed

## Personnel to Select for Training – Primary

### Database Manager

#### 1. Skills

- Typing (min. 40 wpm)
- Very proficient in the Windows environment
- Basic knowledge of flooring business (i.e., what products would be offered in what areas, what kind of takeoffs go with what products, etc.)
- Good communication & organizational skills

#### 2. Responsibilities

- Gather pieces of project information from salespeople, sizing department, and design center staff to put together project pricing using computer system
- Create pricing books, if needed
- Modify pricing on an ongoing basis and create selector pricing
- Transfer selector data to and from off-site systems, if needed
- Accountability for data integrity & selector pricing creation

### Backup Database Manager

#### 1. Skills

- Proficient in the Windows environment
- Basic knowledge of flooring business (i.e., what products would be offered in what areas, what kind of takeoffs go with what products, etc.)

#### 2. Responsibilities

- Keep the system up and running if a database manager is not able to work for any period of time

Design Center Scheduler – (In smaller locations, designers may schedule themselves. In this case, these skills & responsibilities would be added to the Designer category)

#### 1. Skills

- Proficient in the Windows environment
- Typing

#### 2. Responsibilities

- Schedule buyer appointments for Designers and Design Centers
- Print Designer and Design Center schedules periodically
- Enter home buyer contact & lot information into computer system
- Send Buyer Status Sheets to builder sales office on a weekly basis

### Designers

#### 1. Skills

- Proficient in the Windows environment

#### 2. Responsibilities

- Use Design Center module of New Home Management System to make and revise home buyer selections and to deliver this selection information to buyer, builder sales office, and dealer back office

## Personnel to Select for Training – Secondary

Salespeople – The Sales staff will be trained on pulling together project information to hand off to the database manager. They will also be trained on how to sell the benefits of the computer system to the dealer's builders.

Sizing – Sizing / Estimating personnel will be trained on the type of takeoffs the system requires and the formulas it uses to generate standard bids.

Order Entry – These people will be trained on pulling orders from the Selector to RFMS Order Entry and revising orders if necessary.

Product Entry – This may or may not be the Database Manager. Entry done in RFMS.

### Responsibilities:

- Modify existing design center product and color records in RFMS to correctly export to the New Home Management System
- Update product and color data in RFMS on ongoing basis

## Hardware & Network Requirements

The hardware and network requirements to use the system are based on dealer size & needs. To help us better understand the demands of your business as it pertains to this system, please fill out the following.

1. Do you have an in house network connecting the design center, database manager, and back office?
2. Do you have a solid computer to dedicate to the Database Manager?
3. Do you have more than one location?
4. Do you have off-site design centers that aren't networked to the main office?
5. Will you need additional Pervasive Licenses to add the Designers, Design Scheduler, and Database Managers as users?

## Information to Gather & Prepare – Getting Started Forms

Before training, certain data must be gathered from different parts of your business. This information is needed for three reasons:

- To make sure your RFMS Product and Labor files are formatted in a way that will work smoothly with the NHMS integration
- To have Start Up Data ready to set up your system
- To have a project (all information pertaining to estimating, bidding, product specifications, and pricing for a single housing community) ready for sample entry during training.

We prefer to train with your real data, even if we may delete it after the training. This works well because the real issues and needs of your business will come up during training and not the following week when we are gone!

### RFMS Product and Labor files formatted for NHMS integration

Labor File - Diagonal labor rates must be entered as a whole, rather than an additional amounts in the RFMS Labor file. For example, if your basic Ceramic labor rate is \$2.50, and the additional amount for Diagonal installation is \$.30, the line for Ceramic Diagonal labor should be for \$2.80.

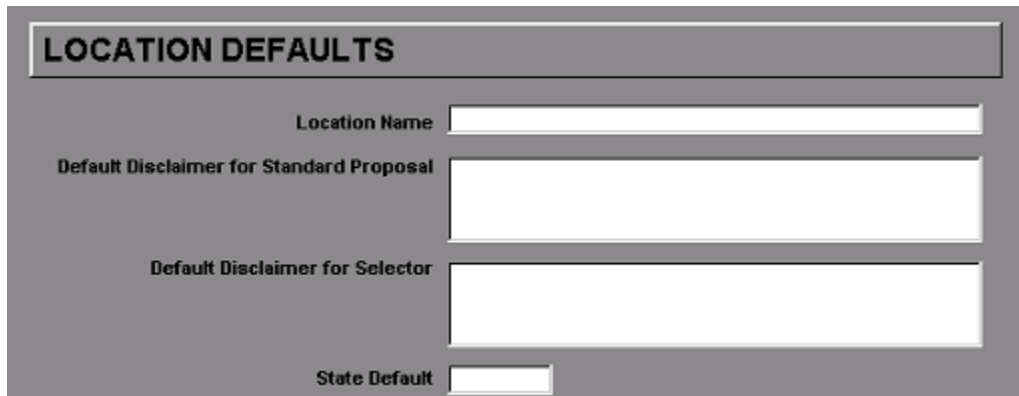
### Products

- ❑ **Builder Advantage Checkbox:** You have two options for displaying products from RFMS to be selected for project specifications. The first option is to show all products in your product file in the NHMS products browse. The advantage of this is that no products need to be “checked” as BA products in your RFMS Product file. The second option is to go through the RFMS product file and mark all products available on your Builder or Design Center projects as “BA” products. You can do this by scrolling through your roll or items file and clicking the BA button on the toolbar when a Builder or Design Center product is highlighted. The advantages of doing are as follows: the product lists on the NHMS Project side will be smaller and easier to navigate, it will open up less room for error in product selection, and it will control the data from the RFMS side.
- ❑ **Required Fields:** The Private Style Name, Supplier, and Cost (Cut Cost for Roll Goods, Item Cost for Items) must be filled out in the RFMS products file for any products you wish to use on projects in the New Home Management System. In the NHMS system, the Width field must be filled out for Roll Goods. For Carpets, this will be 12’, 13.5’, or 15’ goods. For Vinyl, this will be 6’ or 12’. If you fill these widths out in the RFMS product file, it will be imported into NHMS project specifications each time the product is added to a project. If it is blank in RFMS, the width will need to be filled out each time a product is added to a new project.
- ❑ **Optional Fields: Width & Length.** For all Roll Goods and Items, the Width and Length will appear on the Selector Product pop-up and on some of the Selector reports (Color Sheet) if they are filled out. For Length on Roll Goods and for Width and Length on Items, this entry is optional. Again, this can be done in either system, but it only has to be done once in RFMS or every time in the NHMS project entry.

## Other RFMS Entry

You must have all your builders are entered as customers in the RFMS system.  
All Design Consultants & Salespeople must be entered in your RFMS employee file.

## Start Up Data



The screenshot shows a form titled "LOCATION DEFAULTS" with a grey background. It contains four input fields:

- Location Name**: A single-line text input field.
- Default Disclaimer for Standard Proposal**: A multi-line text input field.
- Default Disclaimer for Selector**: A multi-line text input field.
- State Default**: A single-line text input field.

Location Name – This name will appear at the bottom of all reports generated from the system.

Default Disclaimer for Standard Proposal – If you wish to have a disclaimer print on all Standard Proposals or bids that are printed from the system, enter it here. The disclaimers can be left blank or entered on a project-specific basis. This is an optional default setting.

Default Disclaimer for Selector - If you wish to have a disclaimer print on all home buyer selectors or "Color Sheets" that are printed from the system, enter it here. Like the Proposal Disclaimer, this can be left blank or entered on a project-specific basis. This is an optional default setting.

State Default – This will be the default for all "State" entry fields throughout the system.

## Project for Sample Entry

Fill out the following forms for a single community or project (all information pertaining to estimating, bidding, product specifications) to be ready for sample entry during training. Though it is a lot of information to gather, a lot of the project data can be duplicated within the system and used again and again, making the data entry less time consuming the more you use the system.

<b>General Project Information</b>	
Project Name (Name of Community)	
Builder	
Salesperson (Your Salesperson)	
Project City	
Project State	
Standard Products to Bid - Carpet	
Standard Products to Bid – Pad	

<b>General Project Information (Cont.)</b>	
Standard Products to Bid – Vinyl	
Standard Products to Bid – Vinyl Trim, if any	
Standard Products to Bid – Vinyl Underlayment, if any	
Standard Products to Bid – Ceramic	
Standard Products to Bid – Ceramic Underlayment, if any	
Standard Products to Bid – Countertops	
Standard Products to Bid – Other	

The **Product Category** is a grouping for your flooring products that is used to create both standard and upgrade pricing. Each category is related to a single RFMS Product Code. There can be multiple categories associated with one RFMS Product Code, but there cannot be multiple Product Codes associated with one Product Category. What follows is an example of a product category grid with the values filled out, explanations of fields where they aren't self-explanatory, and a blank grid for you to copy and fill out for each product category you would like to offer.

<b>Product Category Information</b>			
Category Name		Carpet	
RFMS Product Code		01	
Category Type (Measure)		CPT SY	
User Installed		Yes	
SF Increase % (Waste Percentage)		N/A	
Diagonal SF Increase % (Additional Waste Factor)		N/A	
Default Labor		\$3.20	
Default Diagonal Labor		N/A	
Default Gross Profit (for Upgrades)		25%	
Participation %		10%	
Design Fee %		N/A	
Grout		No	
Tax Type		Sales Tax Material Only	
Tax Percentage		7.25%	
Trim – Base	No	Underlayment with Wood Subfloor – Hardi Backer	No
Trim – Quarter Round	No	Underlayment with Wood Subfloor – Particle Board	No
Trim – Reducer	No	Underlayment with Wood Subfloor – Vinyl Membrane	No
Trim – Stair Nosing	No	Underlayment with Wood Subfloor – Other 1	No
Trim – Threshold	No	Underlayment with Wood Subfloor – Other 2	No
Trim – T Molding	No	Underlayment with Wood Subfloor – Other 3	No
Trim – Other 1	No	Underlayment with Wood Subfloor – Other 4	No
Trim – Other 2	No	Underlayment with Wood Subfloor – Other 5	No
Trim – Other 3	No	Underlayment with Concrete Subfloor – Hardi Backer	No
Trim – Other 4	No	Underlayment with Concrete Subfloor – Particle Board	No
Trim – Other 5	No	Underlayment with Concrete Subfloor – Vinyl Membrane	No
Trim – Other 6	No	Underlayment with Concrete Subfloor – Other 1	No
Trim – Other 7	No	Underlayment with Concrete Subfloor – Other 2	No
Trim – Other 8	No	Underlayment with Concrete Subfloor – Other 3	No
Trim – Other 9	No	Underlayment with Concrete Subfloor – Other 4	No
Trim – Other 10	No	Underlayment with Concrete Subfloor – Other 5	No

The Category Type is the the of measure associated with the products in that category. The choices are: CPT SY, SV SY, Pad SF, Pad SY, and SF.

User Installed is a Yes/No field, and it indicates whether you are installing the product yourself or just handling the selections in your design center for a different builder subcontractor.

Square Footages are entered in the system as net numbers with no waste attached. The waste gets added depending upon the waste factors associated with the product category the buyer ends up choosing for that area.

The Design Fee is an optional percentage, added as markup.

Builder Participation is added as markup.

The Grout is a Yes/No field that determines whether a grout selection is required in the selector.

The Tax Type determines the calculation that will be used to figure tax on the products in this category. The choices are: No Tax, Use Tax, Sales Tax Material & Labor, and Sales Tax Material Only.

There is a list of known Trims, then a list of miscellaneous trim categories. For Underlayment, there is a list of three underlayments and a list of five miscellaneous underlayment categories. If you wish to use one of these miscellaneous categories, name is as well as marking Yes or No.

<b>Product Category Information</b>			
Category Name			
RFMS Product Code			
Category Type (Measure)			
User Installed			
SF Increase % (Waste Percentage)			
Diagonal SF Increase % (Additional Waste Factor)			
Default Labor			
Default Diagonal Labor			
Default Gross Profit (for Upgrades)			
Participation %			
Design Fee %			
Grout			
Tax Type			
Tax Percentage			
Trim – Base		Underlayment with Wood Subfloor – Hardi Backer	
Trim – Quarter Round		Underlayment with Wood Subfloor – Particle Board	
Trim – Reducer		Underlayment with Wood Subfloor – Vinyl Membrane	
Trim – Stair Nosing		Underlayment with Wood Subfloor – Other 1	
Trim – Threshold		Underlayment with Wood Subfloor – Other 2	
Trim – T Molding		Underlayment with Wood Subfloor – Other 3	
Trim – Other 1		Underlayment with Wood Subfloor – Other 4	
Trim – Other 2		Underlayment with Wood Subfloor – Other 5	
Trim – Other 3		Underlayment with Concrete Subfloor – Hardi Backer	
Trim – Other 4		Underlayment with Concrete Subfloor – Particle Board	
Trim – Other 5		Underlayment with Concrete Subfloor – Vinyl Membrane	
Trim – Other 6		Underlayment with Concrete Subfloor – Other 1	
Trim – Other 7		Underlayment with Concrete Subfloor – Other 2	
Trim – Other 8		Underlayment with Concrete Subfloor – Other 3	
Trim – Other 9		Underlayment with Concrete Subfloor – Other 4	
Trim – Other 10		Underlayment with Concrete Subfloor – Other 5	

The **Product Specifications & Costs** are grouped by category. Please compile a list of all products, including trim and underlayment, for all categories that are offered in your standard and upgrade program on this project. The following things must be included in the list:

- Product Name / Private Style Name
- Supplier
- Width (for all roll goods & tiles) – If this is correct in RFMS, it doesn't necessarily need to be written on the list
- Length (for tiles) – If this is correct in RFMS, it doesn't necessarily need to be written on the list
- Cost – This must be correct in RFMS, but doesn't necessarily need to be written on the list
- Labor Rate
- Diagonal Labor Rate, if applicable
- Gross Profit OR Total Sell Price (Total Price should include Tax. Once either GP or Sell has been entered, the other will be calculated automatically)
- Group – If you're using design center grouping

**Plans & Takeoffs** are the last thing to be gathered. For at least two floor plans in the project, please prepare complete takeoffs the following way:

One set of takeoffs for the total Lineal Footage and total Square Footage for the standard carpet area or "One Color Carpet Area" in the house. This area is an Area Type of "SA" for Standard Area, and a One Color Type of "W" for Whole.

One set of takeoffs for each breakout area that is a subset of the "One Color Carpet Area" including Carpet Lineal Footage, Sheet Vinyl 6' and / or 12' Footage, Net Square Footage, Lineal Footage or Piece Count for any trims that might be needed in that area. These areas have an Area Type of "SA" for Standard Area, and a One Color Type of "P" for Partial.

One set of takeoffs for each area that is not standard carpet, including Builder Construction Options with a notation of the standard category, Lineal Footage for any Roll Goods that will be offered in that area, Net Square Footage, and Lineal Footage or Piece Count for any Trims that might be used in that area with any product offered in that area. These areas have an Area Type of "SA" for Standard Area or "BCO" for Builder Construction Option, and a One Color Type of "N" for Not a Part of a One Color Area.

If you wish to do any sections in these plans, for instance if you wish to offer a bathroom as a whole or as a vanity plus a water closet, please make takeoffs for all three areas, and mark either the whole or the parts as SA Area Types, and the other set as RSA Area Types. This stands for Redistribution of Standard Area.

You may use the attached Excel Spreadsheet, "Takeoffs Form" (one form for all takeoffs in plan), or use a printout from your existing takeoff system.

