Customer Access Interface
Revision 2

The CAI software module will allow contractors access to their dealer's POS system via an Internet connection to retrieve and view the billing statements, invoices, orders, etc. connected to their account and/or projects. Contractors may also browse the store's inventory through a variety of search criteria to look at the store's quantity on hand for different material or their respective pricing on material.

Contractors have the ability to maintain their own material lists for job estimates that they have in various stages of completion. These can be sent to a contractor's PC printer for printing on their letterhead, along with estimates of labor and sales tax, for job bidding purposes. These quotes can subsequently be sent to the dealer for ordering with shipping/delivery instructions.

Information on accounts, projects, inventory, etc. can be downloaded to a contractor's PC and be later used by CAI in an offline capacity, such as on a job site. Obviously when used in this fashion the information is only as current as the last checkpoint. When used online via the Internet, information accessed is automatically saved via checkpoint to the PC. Based on the contractor's preference, they may choose to use the product primarily in an online state or choose to checkpoint data periodically, as in weekly, and run in an offline fashion from home or on the job site.

The CAI software also supports a dealer's outside sales force in similar fashion to the contractor with the same functionality being available. The main difference being a salesperson can have access to any of his/her assigned accounts while the contractor can access only his/her account.

Contractors should contact their dealer for a copy of the software and a userID/password combination to allow access to their account information. The dealer may optionally provide a network password to control access to the store's system as an additional security measure. If so, the first time connection is attempted the contractor will be prompted to enter the network password that will then be saved for later use.

To install the CAI software on your PC, place the CD into your CD ROM drive, setup will occur via standard Microsoft software installation procedures.

Logging In
When first used, there has been no data previously saved to the PC. It is recommended that the user login to the store for initialization of key files. Clicking on LOGIN and entering an appropriate userID/password in the specified fields and pressing ENTER or clicking on OK accomplishes this. If the user is accessing the Spruce Server through the NetAccess software, a prompt for a Web Connect User Id will be presented. This Web Connect userID will then be applied automatically upon subsequent logins. The standard CAI userID/password will always be needed to use CAI in an online mode.

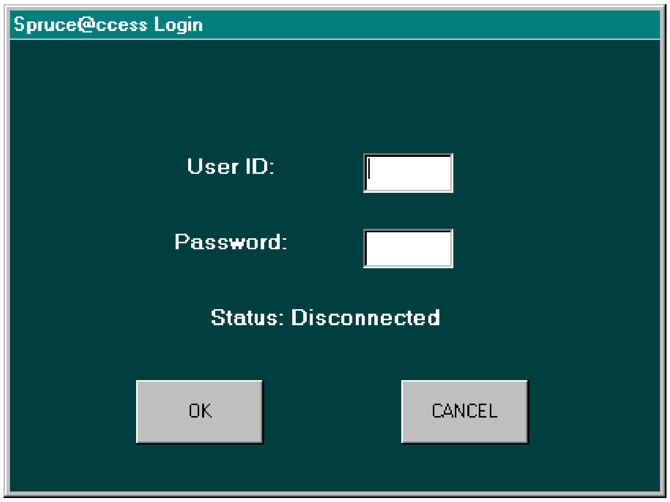


Figure 1. Standard CAI Login

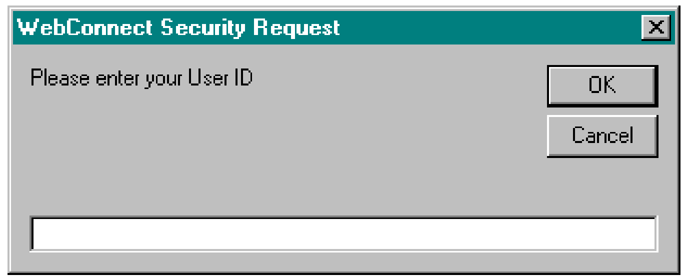


Figure 2.
One time NetAccess Prompt

When preparing to Login to access the store's system for real time information, the user should have previously established an Internet connection via an ISP or dedicated Internet connection. Verification of the ID will be initiated and if successful the user will be active on the store's system. Notification of success or failure will occur. Reasons for an unsuccessful attempt may include incorrect entry of the user ID or password (check for upper/lower case settings), the store's system is not running, the store has blocked out this time slot for contractor access or there are currently maximum users on the store system. If successful, a small number of files will be updated to the contractor's PC.

Automatic Upgrades
The login sequence also checks to see if a new level of CAI software is available. If so, the user is prompted as to whether they wish to download the latest level. The system will then connect to the Spruce Website and the new software will be downloaded and started. The user will then have to login again.

Database Initialization
If this is the first usage of the ID the user will be prompted as to whether they wish to initialize the database. This checkpoint procedure makes a full set of local data available for operation offline. If they choose to do so, this phase will take 10-15 minutes depending on the amount of information available for downloading and the speed of the connection. If the database is not initialized, the only information that will be available offline will be whatever was accessed while online.

The Initialization screen can also be entered by clicking on Initialization found under the Maintenance section of the menu. This can be done whenever a full checkpoint of a specific file is desired. All files can be downloaded or specific files can be chosen selectively. Available choices include account/project balances, billing statements, past invoices, orders/quotes, and inventory information. Inventory information will take the longest to download, especially if the consolidated option is chosen which will download store specific information (such as quantity on hand) from each location in a multi-store business. Consolidated inventory information may not be of interest to most contractors.

As information is being downloaded a record count will be displayed to show rate of progress. The date of the file's last checkpoint is provided for reference purposes. If CAI is used extensively in an online capacity, it may not be necessary to checkpoint files other than at initial login as the PC copy of information will be updated automatically from the store's system as it is being routinely referenced.

Multiple User ID's One PC

The system has been designed to maintain a separate local database for each login. This is primarily to support testing procedures where one person may want to login as a salesperson, a contractor and a system manager. A separate database would be created with a naming convention of CAI + user id. Note that you will be prompted to initialize each database as it is created. For systems that are utilizing this feature, a prompt will appear when starting CAI in offline mode to enter a user id, so that the correct database will be opened. It is ok to then go online with a different user id. The appropriate local database will be opened that corresponds with the ID entered.

Passwords

It is recommended that the password be changed periodically for security purposes. This can also be found in the Maintenance section and must be done while online. Passwords should be somewhat cryptic (up to six characters) and not something simple such as 1, 2, or 3. Completing the Maintenance section is the Log function that will show the start/stop times of previous online sessions.

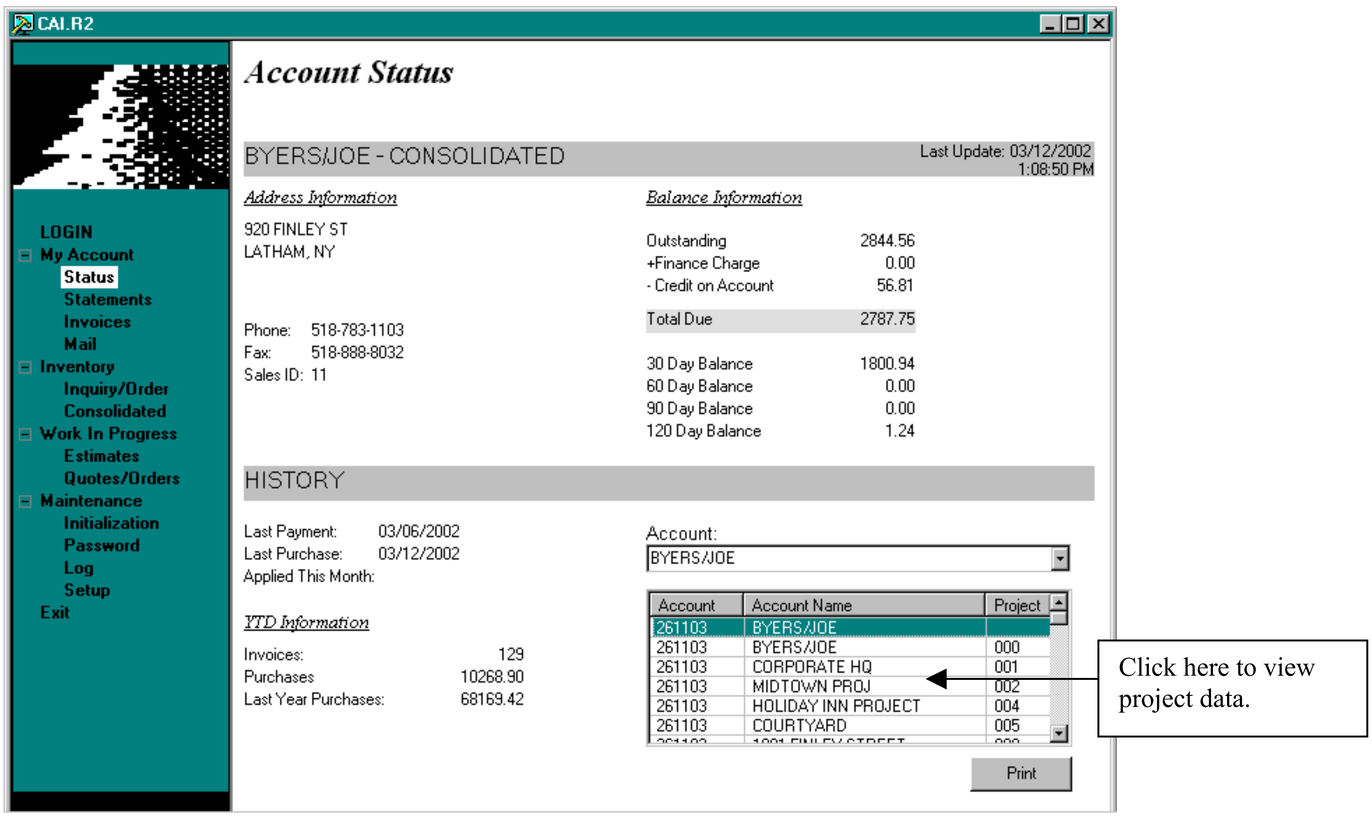
Once logged on to the store's system, the LOGIN menu selection will change to LOGOFF. Clicking on LOGOFF will disconnect the user from the store's system but will leave CAI active in an offline state where it can still be used referencing data previously saved to the PC.

Clicking on Exit at the bottom of the menu list will terminate the CAI software.

My Account

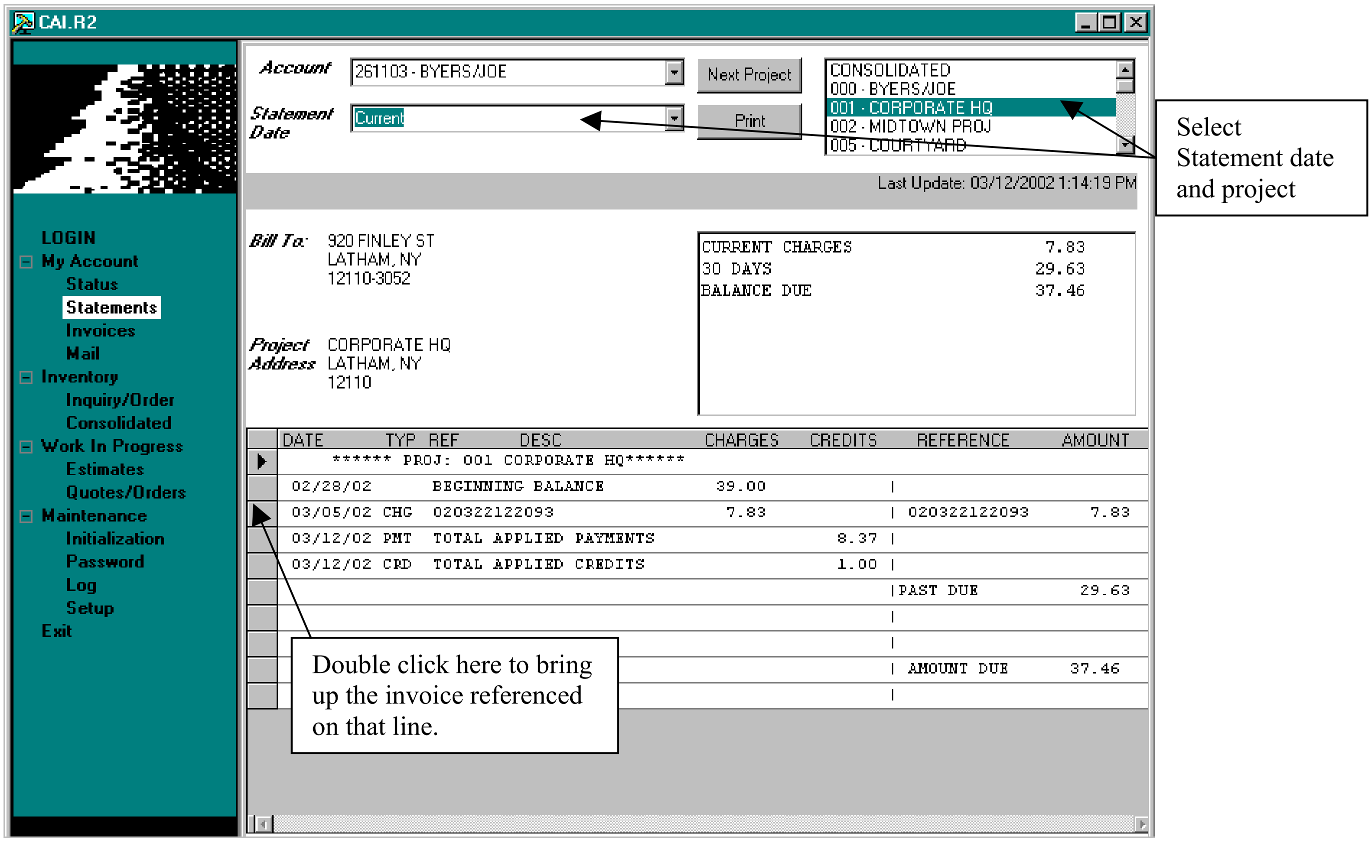
The My Account section includes access to account/project information such as balances, billing statements, previous invoices, and mail between the contractor and store.

Account Status



Selecting Status from the side menu will place you on an inquiry screen where you can display the status of an account (consolidation of all projects connected to this account) or an individual project. To select a consolidation of projects, click on the first entry in the drop down list (blank project id) or click on a particular project for its status information. To receive a printout of this information, click on the Print button.

Statements



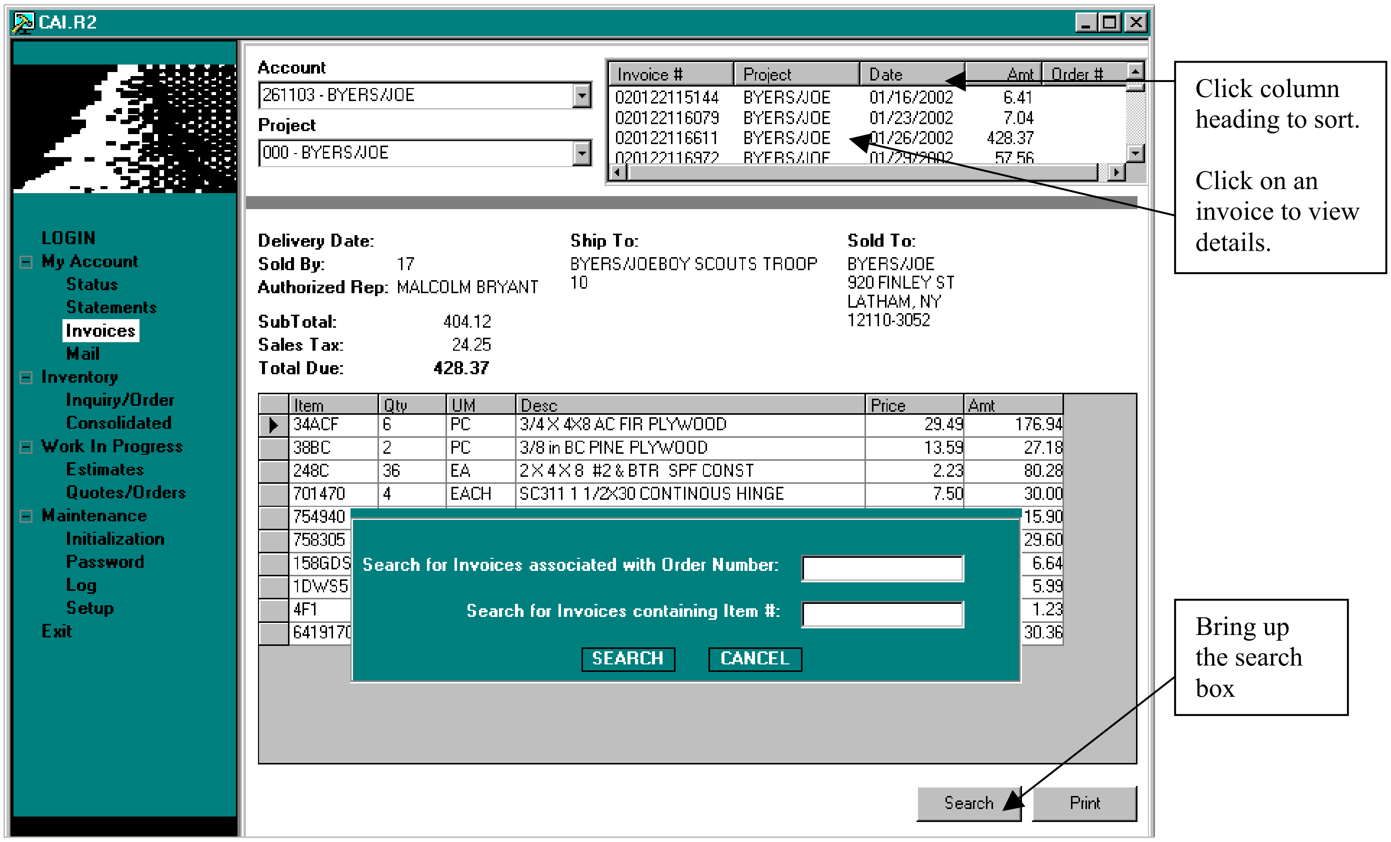
To look at an account's current or past billing statements, click **Statements** from the side menu. From the statement date drop down list choose Current or a date corresponding to a particular billing cycle. If a date is chosen and that particular statement has been previously viewed or downloaded, the copy saved on the contractor's PC will be used for viewing. If Current is chosen and the contractor is online to the dealer's system, a copy of his/her current statement will be generated and downloaded to the PC. This may take a few minutes. If Current is chosen and the contractor is not online, the last statement generated and saved as current to the PC will be displayed. Obviously, this statement should not be considered as current but is representative of billing up to the date shown.

After selecting the time period, a consolidated statement or a statement for one project can be viewed by clicking Consolidated or a particular project ID from the list. The user can advance through particular projects by clicking on the Next Project button. A printout of the statement is also available by clicking on the Print button.

<u>Viewing invoices referenced in statement</u>

Double click a row (in the gray area at the start of the row) to view a particular invoice related to a charge referenced on that line. If that invoice has previously been saved to the PC (via initialization, or by viewing invoices), it will be displayed on screen. Click again on Statement from the side menu to return.

Invoice Inquiry



Invoice inquiry can also be accessed via the Invoices function found under My Account in the side menu. Again, invoices can be retrieved for all projects or for a particular project by clicking the appropriate option out of the list. Invoice summary information for the project selected (or all projects) will be displayed in the upper right corner of the screen. The details of a particular invoice can be viewed by clicking on an invoice number in that list. A copy of the invoice can be printed via the Print button.

If the user is looking for an invoice that contained the purchase of a particular item or an invoice related to a previous order, a search function is available by clicking on the Search button. This search will be against the locally stored invoices. That is, those invoices that were downloaded via Initialization or saved to the PC by referencing it while online. The user can enter either an item number or an order number in the appropriate field display shown upon clicking the Search button. The invoices matching the search criteria will then be shown in the invoice list.

Mail

The Mail function under the My Account menu will allow the contractor to view mail sent to his/her account by someone from within the store or to send a mail message to a selected number of store mailboxes. The user must be online to the store system in order to send/receive mail. However, any previously retrieved mail messages can be viewed when running CAI offline. The user is notified of new mail when the user successfully signs on to the store system. Select Mail from the side menu to retrieve it to the PC.

To send a mail message, choose a mailbox from the To list and enter the subject matter and the text of the message. Click on the Send button when you wish to mail the message. The To list will consist only of those 2 IDs entered on the setup screen which are the contractor's salesperson ID and a backup. If another ID is known, it can be typed in.

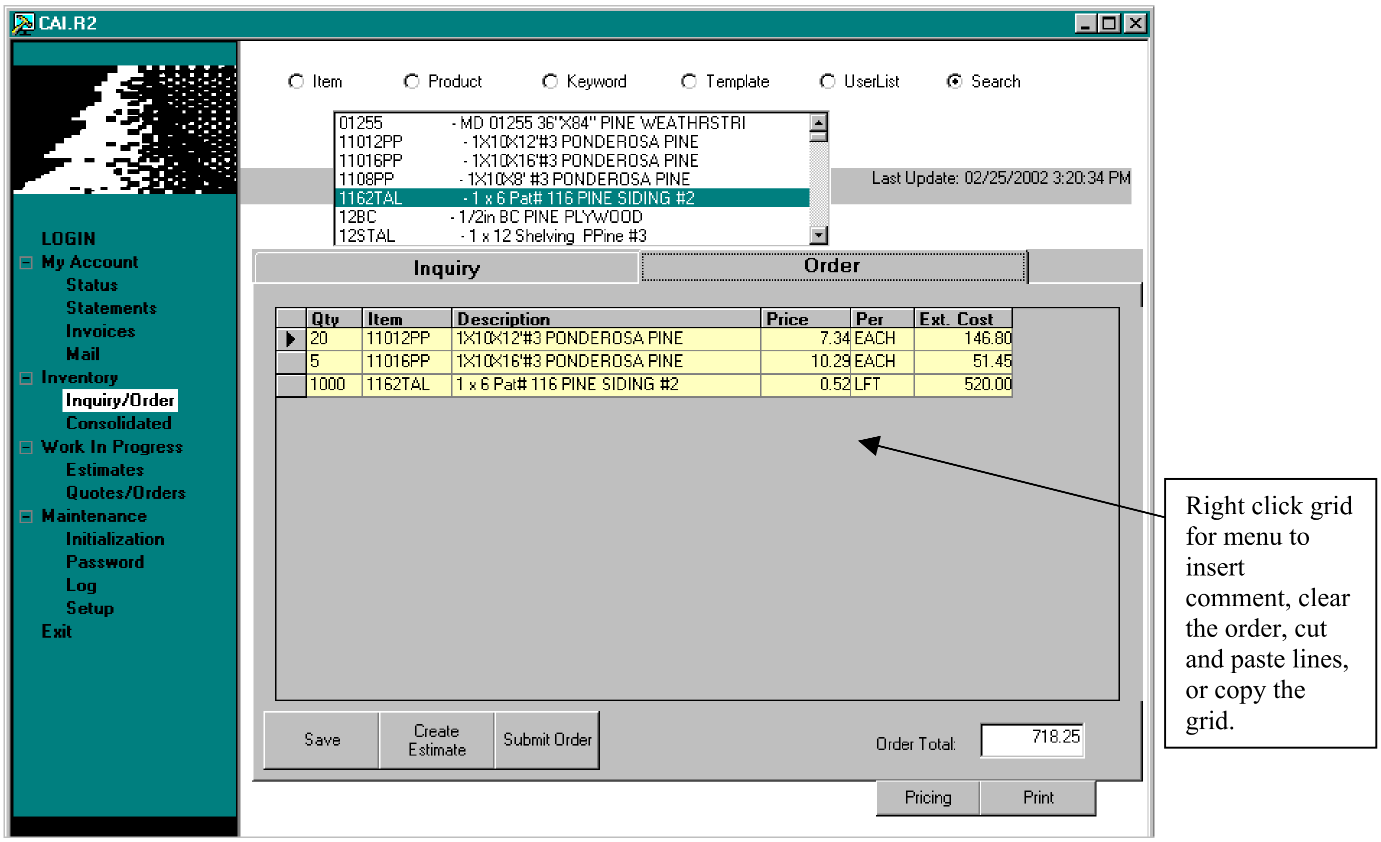
To view a message sent to your account, click on the message list found at the top of the screen. The mail message will then be displayed.

Click on the New button to clear the display area in preparation for creating a new message.

Inventory

The Inventory menu area contains functions to allow the user to browse through the store's inventory information via a number of search functions and/or inquiry functions. If this is a multi-store operation, there is a Consolidated screen to allow the user to retrieve a grid display showing the quantity on hand information related to selected items for all stores. In addition to viewing information, a contractor may create a list of items and their respective quantities for purposes of job estimates and subsequent submission to the store for quoting or ordering purposes.

Inquiry/Order



Getting Items into the Inquiry Folder

By clicking on Inquiry/Order, the user will be placed initially into an inquiry folder where various material lists can be viewed through a number of selected options. The first of these is by item number which when chosen will generate a drop down list in item number order of the store's inventory file. This list could be quite extensive and may require some time to generate. It is the most comprehensive list of material that the store carries. Click on an item to move it to the inquiry folder. Use the scroll bar to position the cursor to a particular item, or if the item number is known the user may simply type the number to position the cursor onto that item.

A more practical viewing method is by product group. By clicking on the product option a list of the store's product groups will be displayed. All items found in that product group can be moved to the inquiry folder by selecting a product from the list. This same technique can be applied via the keyword option, provided the dealer has associated keywords with the item numbers.

Templates
Some dealers may have prepared lists of items called templates with which contractors can view material lists that have been pre-arranged based on the nature of their business. For example, there could be a template representing the material of interest to painters, or one for framers, roofers, electricians, etc. where the items found in the template are actually from more than one product group.

User Lists
Contractors can also create such a template for their own use for frequently referenced material lists, preferred items, or common job quotes. These are called User Lists. This is accomplished by creating a list of items in the Order folder and then clicking the Save button (not the Submit button). This brings up a form to enter a User List ID and a User List description. These lists are then available for future use.

Search
Lastly, the user can browse the inventory list by searching for a particular word found in the item's description, as an example 2x4. All item numbers containing the word specified would be returned to an item list where they can be subsequently moved to the inquiry folder. The search is not case sensitive, but it is sensitive to spacing. Therefore, a search for 2x4 and 2 x 4 will yield different results.

When moved into the inquiry folder, the item number and description will be displayed along with the item price, unit of measure, and the quantity on hand. The price defaults to contractor price and can be re-displayed with retail price by clicking on the Pricing button, located in the lower right corner.

Moving Items from Inquiry Folder to Order Folder

The first column in the inquiry folder allows for the contractor to enter a number in terms of the unit of measure displayed for later ordering/estimating purposes. Entering a number does not automatically order that item. To place an item into the order folder the user must click on the **Add to Order** button which will move all items in the inquiry folder with a quantity entered in column one into the Order folder. A running total of the dollar amount in the order folder is maintained in the lower right corner. Once moved into the order folder, the quantity entered in the inquiry folder will be reset to zero and an asterisk will mark those items present in the Order folder. Click on the asterisk to show the quantity previously ordered.

The items in the Inquiry folder marked with order quantities can be filtered for display by right clicking on the grid and choosing the >0 option. This will result in showing only those items that have quantities entered but have not been moved to the Order folder. Also off the right click menu is an option to clear the quantity column of the Inquiry folder.

To see what is in the order folder, the user can click on the Order tab to switch folders. This folder's display replaces the quantity on hand column with an extended price column based on the quantity specified. The quantity to order for an item can be modified by typing in a new amount to the left of the item number. As in the Inquiry folder, Pricing and Print buttons are available.

A right click menu is also available in the order folder by clicking anywhere on the grid display. Options off this menu include the ability to enter comments inline with items, cutting and pasting to rearrange the physical order of items, and an option to clear the Order folder.

<u>Saving Order as Userlist, Template, Quote, Order or Estimate</u>

The contents of the Order folder can be saved to the contractor's PC as a UserList (previously described) by clicking on the **Save** button and providing an ID and description when asked. If the user is logged in as a system manager or a store manager the option to save the items as a system template is also available after providing an ID and description. (Note: store managers must be granted permission to create system templates during User ID setup) The items in the order folder can also be sent to the store by clicking on the **Submit Order** button for processing as an order or quote. The user will be prompted for an ID, description, and the related project for which this quote/order pertains. If the user is online, the order will be submitted to the SprucePlus System. If not online when submitting a quote/order, it will be saved locally and the user will be reminded that there are un-submitted quote(s)/order(s) waiting to be processed each time they enter the CAI software. At the bottom of the Inquiry/Order screen is a status message displaying the number of unsubmitted quotes/orders. If you are online and ready to submit quotes/orders created offline, click this message to display a screen from which they can be sent.

<u>Spruce Procedures for Receiving orders created by CAI</u>

When a contractor submits a quote or order via CAI, a mail message is generated in Spruce Mail to the contractor's assigned salesperson. This salesperson's mailbox is entered on the setup screen, along with a secondary mailbox in case the primary salesperson is on vacation, etc.

- To process the contractor's quote or order the salesperson should access Sale/Order/Quote on the SprucePlus system.

- On the first screen bring up the option box and choose ORDER and on the submenu, ACCESS. If a specific account has been identified on the first screen, only orders for that account will be listed, otherwise all orders will be listed.

- From the list that is presented, pick the order and hit return. This action brings the items into the second screen to be modified and closed out appropriately.

- Also, from the Backroom POS menu you can choose CA Inquiry for a general inquiry screen of all CAI quote/orders waiting to be processed.

Estimates

If the contractor is preparing an estimate for his/her own use, click on the **Estimate** button to allow manipulation of pricing, entry for labor costs, sales tax, and a description of the project including name, address, etc. This will allow the contractor to print a document for estimating purposes on letterhead paper. A folder of saved estimates will be maintained locally for the contractor. This folder is also accessible by clicking on Estimates under the Work in Progress menu.

The Estimate function allows the contractor to enter a name and address for a "Prepared for" field and a "Quoted by" field. There is a free format comment area that can be used for any descriptive text.

Many contractors calculate their estimates from material costs and labor. Material costs in the estimate folder can be based on either retail or contractor price. These costs can be manipulated by either a percentage markup over contractor or retail price or a percentage decrease from retail. Selecting the appropriate option designation and entering a positive/negative number percentage in the field to the right of the price designation do this. If it is desired to print the estimate without showing the material pricing at the item level, the user can also click on the show no pricing option after manipulating the material costs.

Once the material costs for the estimate have been finalized, sales tax needs to be entered. If labor is taxable in the user's state, it is recommended that the contractor's total labor costs be entered in the appropriate field before entering sales tax. If all of the material is taxable and not subject to capital improvement designation, a percentage number can be entered in the sales tax field and the resultant tax will be calculated based on total materials and labor if present. Otherwise the sales tax will need to be calculated manually and entered as a number without the percent sign.

Moving an Estimate to the Order Folder

The estimate is saved locally to the contractor's PC. The estimate can be printed locally for the contractor's use in bidding jobs. Previously saved estimates can be retrieved by clicking on the entry in the saved estimate list at the top of the screen. This estimate can subsequently be moved to the Order folder by clicking on the **Send to Order** button and from there the user can switch to the Inquiry folder to check on available material and/or send the order to the store for processing as a quote or order.

After sending the estimate to the Order folder, the user may return to the Estimate folder by selecting Estimates under the Work in Progress menu. This will keep the current estimate on display. If the user wishes to make a copy of this estimate for another bid, the estimate should be sent to the Order folder where the Create Estimate button can be selected. This will send the contents of the Order folder back to the estimate screen as though it were a new bid.

Work In Progress

Invoices/Orders

When sending a material list to the store, the user can indicate whether it should be processed as a quote or an order. Depending on the store's in-house procedures for handling such lists, this process may occur within an hour if sent during normal business hours or certainly by the next day.

Processed quotes and orders may be viewed by clicking on the Quotes/Orders function within the Work in Progress menu. The user will be placed on a screen where the project selection can occur. As with other areas in CAI, quotes/orders for all projects or for a particular project can be viewed by selecting the appropriate entry in the project list. This will cause a quote/order summary list to be displayed in the upper right corner of the screen.

The summary display consists of a document number, type indication (quote or order), and the project ID associated with the quote/order, open or closed status, amount, and creation date. By clicking on any of the column headings the list can be redisplayed in any sorted order. Click once to sort in descending order, click again on the same column to sort in ascending order.

To display the detail information of a quote or order, click on the desired document number and the display grid will contain the item information found in that document. Some of the columns displayed such as received and stocked are only relevant depending on whether it is a non-stocked special order item.

The user may wish to use a previous order for purposes of inventory inquiry, estimating, resubmission as a new order, etc. after possibly make minor changes to the material list. Retrieving the quote/order and clicking on the Send to Folder button can accomplish this. This will place the material list of that document into the Order folder, where it can be modified with quantities changed, new items added or existing items deleted. From the Order folder, the user can flip to the Inquiry folder or create an estimate, or resubmit the material list to the store as a new quote/order. It should be noted that whenever old document information is retrieved and placed into one of these folders, the current pricing in effect is used to automatically update the material lists.

Maintenance

Initialization

This screen is used when the system is first accessed so that a complete set of data will be available in offline mode. It can be accessed anytime during an online session to checkpoint a file. The salesperson is given the option to download those files for specific accounts where applicable.

For the larger files, such as inventory, you will see a status counter recording how many records were received. It is updated about every 100 records. The consolidated inventory file is optional as it may be of interest only to salespeople. It remains unchecked when ALL FILES is chosen. It must be checked off specifically.