- **Main Menu**
  - Segmented into four primary sections
    - Reference Info (purple) – Project Setup and Global system standards; *not* project-specific
    - Specifications (green) – Furnishing & OFCI specs; project-specific
    - Finish Schedule (orange) – Finish Legend & Finish Schedule; project-specific
    - Reports (blue) – Specification & Summary Reports; project-specific

- **Reference Info: Project Info**
  - Project Information
    - Project Number (always required)
    - Status (A – Active by default)
    - Project Category: directly relates to instructions assigned in System Info & Utilities – Do NOT set unless using categories on your instructions. (Ref. SETTING THE STANDARDS class)
    - Firm: setup multiple configurations in System Info & Utilities (always required). (Ref. SETTING THE STANDARDS class)
    - Link a Preamble to the project, which can be printed from the Project Summary Reports.
    - No Auto Instructions: stops instructions from automatically 'pulling-in' to your specifications
    - Use FURN on OFCI: adds Furnishing items to OFCI spec list
      - Benefit: quantifying single items to multiple Areas and/or Room Types
    - Show Price: automatically sets the 'Show Price' toggle option on report screens
    - Show Rm Brkdn: automatically sets the 'Room Breakdown' toggle option on report screens
    - Additional Charges: setup charges (i.e. Freight, Contingencies) - taken as percentages. Summarized as toggle option on specific Summary Reports.
    - Set the Date Format and Currency Type used for the system and reporting.
  - Purchasing Agent
    - Create New or select a previous entry from drop-down list.
  - Contacts
    - Enter critical contacts to the project (i.e. Client, Architect, General Contractor)
      - Click New Contact button to enter more contacts.
      - Click the 'Go To' Project Contact and Contact SubType buttons to create new contact and contact subtype options.
    - Print the 'Project Directory' in Project Summary Reports
  - Areas/Room Types
    - Establish major Area Headings, Areas, Room Types and/or Room Numbers
    - Area
      - Abbreviate the Area code with unique alpha-numeric characters(always required)
      - Enter Area Description
      - Qty of rooms is 1 unless quantities are established in Room Type/Sub Area
      - Select P or G (Public or Guest) – (always required)
      - Assign a Sort order to the Areas (optional)
    - Area Heading (optional)- upper level grouping for reports
      - Click on Area Heading button Area Heading to establish Area Headings
      - Abbreviate the Area Heading code with alpha-numeric characters

        - Enter Area Heading Description
        - Assign a sort order to be carried out on Budget Reports
        - Return back to Areas/Room Types tab to assign Area Headings to Areas
    - Room Types/Sub Areas (per Area)
        - Abbreviate the Room Type code with alpha-numeric characters
        - Enter Room Type Description (i.e. K - King Room, DD - Double Room)
        - Enter the total number of rooms for each Room Type
        - Click on the Add Room Listing button beside each Room Type to enter Room Numbers according to floor plans (i.e. 200, 202, 204 are all DD - Double Room Types)
            - Room Numbers can be displayed on Project Areas & Room Types outline reports
            - Room Numbers carried out on FF&E Qty Matrix (Item Qty per Room) Report only
    - Copy Project Areas/Room Types to a New Project
        - Click on the Copy button COPY
        - Select the Project# to copy from, and then select the Project# to copy to; then click the ‘Copy Areas’ button – will be prompted to copy Room Types if needed.

- **Specifications: Furnishing List**
  - Create a list for Furnishing items (i.e. Casegoods, Seating, Artwork, Table Lamps, Window Treatments)
    - Select the Area that the item belongs
    - Enter the item number (i.e. 200)- sort is alpha-numeric (i.e. 100, 200,.. OR 01, 10, 100) so consider your numbering
    - Select the Item Type (visit System Info & Utilities to create new or hide Item Types)
    - Enter a basic description of the item (i.e. “Side Table” or “Side Table @ Lobby”)
    - Click on the Rm Qty button to link the item to multiple Room Types (use only in Areas with Room Types/Sub Areas)
    - OR enter the item quantity for the Area in the Item column if no Room Types/Sub Areas
    - Select the Unit of Measurement (visit System Info & Utilities to create new units of measure)
    - Enter the unit cost of the item
        - Spexx will automatically generate the extended cost
    - Type in or select the Manufacturer for the item
        - A) Manufacturer will auto-populate if already entered in system
        - B) Manufacturer detail screen will automatically open to ‘add on the fly’ if entering a new manufacturer
    - Type in or select the Source for the item
        - A) Referenced or related Sources will be listed at the top of the pull-down listing
        - B) Source will auto-populate if already entered in system
        - C) OR Source detail screen will automatically open to ‘add on the fly’ if entering a new Source
    - Click once on the Img box to link the first primary image to the spec
        - A) Browse for the image – should be saved in a commonly shared folder
        - B) Select image from Image Gallery (if image is located there)(Ref. WORKING WITH IMAGES class)
    - Select a Status code (visit System Info & Utilities to create new status codes)
    - Click on the Status Notes button to enter notes regarding the specification status

        - Print the Specification Status (toggle Notes) in Project Summary reports
    - Select a Category (optional; visit System Info & Utilities to create new spec categories)
    - Click on the LEED box to identify the spec as a “leed” or “green” item/product
- Entering the full specification details and adding images
    - Double-click the record selector (box to the left of the line item) to view/edit spec details
    - Fill in the blanks on your spec template
        - Click on the ‘Hide Blanks’ button or Type “hide” into text fields for criteria that does not apply (hidden on spec reports)
    - Select Fabric references from the COM/COL Reference Items drop-down list
        - Fabrics must first be entered as separate specifications on the Furnishing List
            - ACF, BDF, CGF, LTF, SGF, and WTF are all item types for fabric specifications
            - Label Fabric specifications using A, B, C **OR** .1, .2, .3 as part of the item number to sort on reports (i.e. 250<u>A</u>-SGF or 250<u>.1</u>-SGF)
        - Enter the location that the reference item will be applied (i.e. “Fabric @ <u>Seat</u>” or “Welt @ <u>Seat Cushion</u>”)
        - Enter a reference quantity per item (i.e. ‘5’ if there are 5 yds fabric per item)
    - Select Finish items from the Reference Finish Items drop-down list (optional)
        - Use this feature only if you want or need to specify the finish as a separate spec
    - Click once on the Instructions button to auto-populate with instructions from the ‘master list’ of instructions per item type (visit System Info & Utilities to create ‘master list’ instructions)
        - View/Edit the instructions
        - Add an instruction to the ‘master list’ by clicking on the Add button (caution)
        - Click on the ‘Copy All’ button to copy all instructions to another specification
    - Check the submittal item boxes that apply to the spec (Seaming Diagram, Strike-Off, Finish Sample, Cut for Approval, Shop Drawing, Prototype, Flame Certificate)
        - Visit the Follow-Up Tracking section to track submittals and keep notes
        - Print the Follow-Up Items & Follow-Up by Type reports in Project Summary reports
    - Click on the Browse button beside each image to add up to four images per spec, plus one large image (fits on 11” x 17” paper)
        - Images should be .jpg (preferred) or .bmp
        - Images should be 100kb or less
        - Images should remain in the same file location throughout as they are linked
        - When prompted, add images to the Image Gallery only when the image will be used multiple times (i.e. a commonly used item or rendering) rather than just once on a spec; otherwise, just select ‘No’
        - Take the ‘Working with Images’ training class and refer to associated FAQ sheets
    - Click on the Image Caption button to enter captions that will appear on Full Spec and Cut Sheet reports
    - Enter Lead Time (in weeks)
    - Enter a Ship To location by using [‘Ctrl’ + ‘Enter’] to add multi-line text
        - ABC Warehouse (hit ‘Ctrl’ + ‘Enter’)
1234 Main St. (hit ‘Ctrl’ + ‘Enter’)
Dallas, TX 75204
    - Enter a Drawing reference number

- **Specifications: Budgeted/Installed OFCI Spec List**
    - Create a list for budgeted and installed items (i.e. Carpet, Wallcovering, Hard-wired Lighting) – works exactly like the Furnishing List except for a few steps
        - Select the Item Type first
        - Enter the item number (i.e. 01)- sort is alpha-numeric so use leading zeros (i.e. 01, 02,…10,11)
        - Enter a basic description of the item (i.e. "Corridor Carpet" or "Carpet @ Meeting Room")
        - Click on the Area Qty button to link the item to a single Area or multiple Areas and/or Room Types
        - Reference the 'FURN vs OFCI' FAQ sheet and 'Adding Area QTYs' FAQ sheet

- **Specifications: Finish Legend**
    - Create a list for finish items (i.e. Paint, Tile, Wood) – works exactly like the Budgeted/Installed OFCI List except for one step
        - There is no Area Qty button to link finish items to Areas and/or Room Types; however, you can still enter quantities and pricing
        - The finish items are linked to rooms within the Finish Schedule, which is created separately from the Areas/Room Types section in Project Information
        - Take the Finish Schedule class

- **Using the Solution Center**
    - From several locations within Spexx, there is a Solution Center button that takes you to our website – www.spexx.biz – where you can access the Spexx Customer Login feature
        - When prompted, enter your Username and Password to access the Spexx User Area and Solution Center, Training Class Registration, and Training Videos
            - Username: SpexxUser
            - Password: [current password]
        - View and register for more training classes or browse through the Solution Center to find answers to the most common questions

- **Suggested Classes**
    - Setting the Standards (Admin Only)
    - Manufacturers & Sources
    - Working with Images
    - Reports-Report Design