**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 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)
      o Room Numbers can be displayed on Project Areas & Room Types outline reports
      o 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
    • 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
    o 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
    o 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
      o ACF, BDF, CGF, LTF, SGF, and WTF are all item types for fabric specifications
      o Label Fabric specifications using A, B, C OR .1, .2, .3 as part of the item number to sort on reports (i.e. 250A-SGF or 250.1-SGF)
    • Enter the location that the reference item will be applied (i.e. “Fabric @ Seat” or “Welt @ Seat Cushion”)
    • 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
    • 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