Management Software

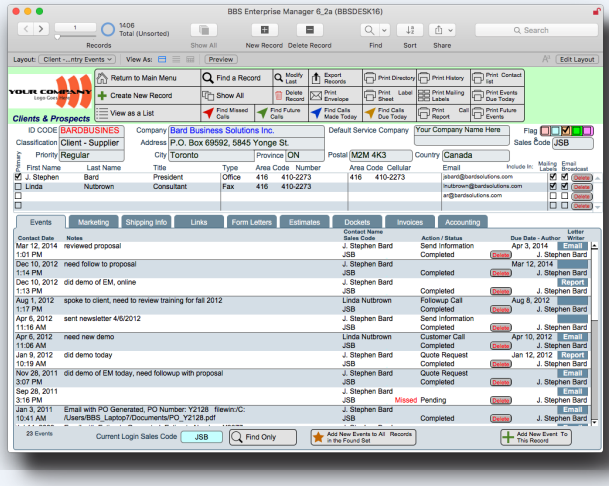
One Program is used to manage your entire company.

EM

Enterprise Manager

Clients & Prospects

- CRM for clients, prospects and suppliers
- company name and address, multiple contacts, phone numbers and email addresses
- record all correspondence, letter writer, marketing information, form letters, summary information linked to estimates, dockets and invoices



Employees

- information regarding your staff
- their relative job functions, cost and billable hourly rates
- populates the menu lists in the Time Sheets

Equipment & Resources

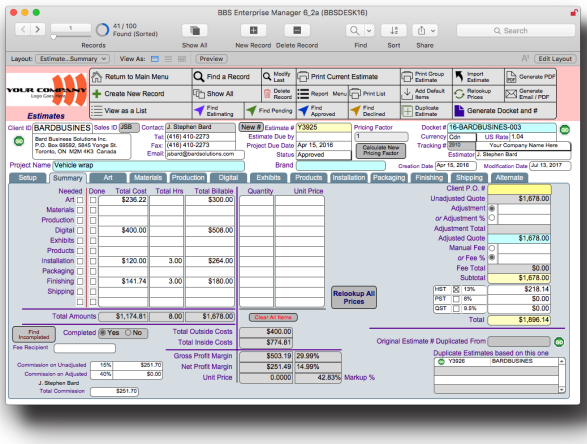
- information regarding all your equipment and resources
- cost and billable rates for each piece of equipment or resource
- bill by the hour or by a counter

Rate Card & Elements

- support database for the estimating and costing databases
- ID Code, classification, category, size, description, auto enter default quantity, default cost, and markup
- each item will automatically determine the selling price
- fully functional inventory system

Estimates

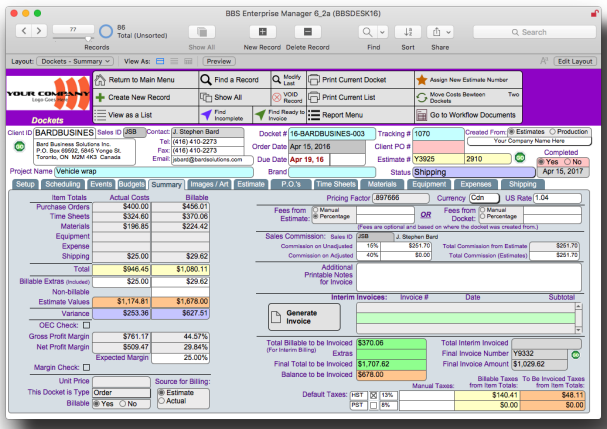
- track all your estimates for your clients
- setup section allows you to enter all the relative parameters and specifications for the estimate
- summary section shows the totals for each department
- prices are automatically entered for you based on the rate card table, with the ability to override



- an alternate format for estimates is available when you need to design your estimate on alternate specifications and totals
- additional adjustments and pricing factors can also be added
- gross and net profit margins are automatically calculated for you
- generate a pdf of an estimate, email to the client and log the event in one action
- once an estimate is approved, all the information is passed onto a docket with a single click of a button

Dockets

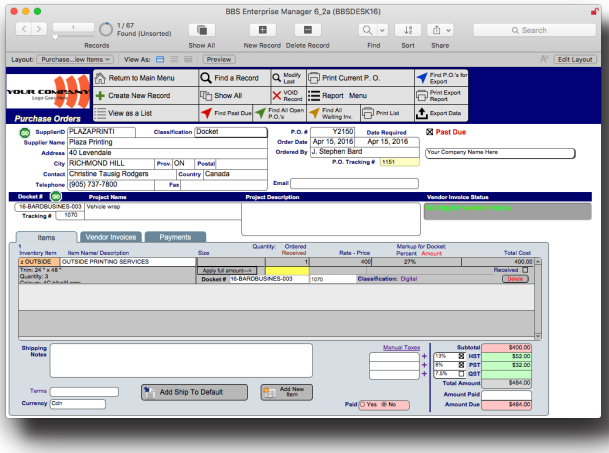
- track and monitor all active jobs for your company
- all the key steps in a docket can be entered with their relative scheduled dates and check list, these items are



attached to a calendar interface and gantt chart
• all costs including time sheets, equipment, purchase orders, expenses, materials / inventory and shipping are attached to their applicable docket
• a summary section compares estimated values to the actual costs as well as gross and net profit margins
• generate shipping labels for any destination

Purchase Orders

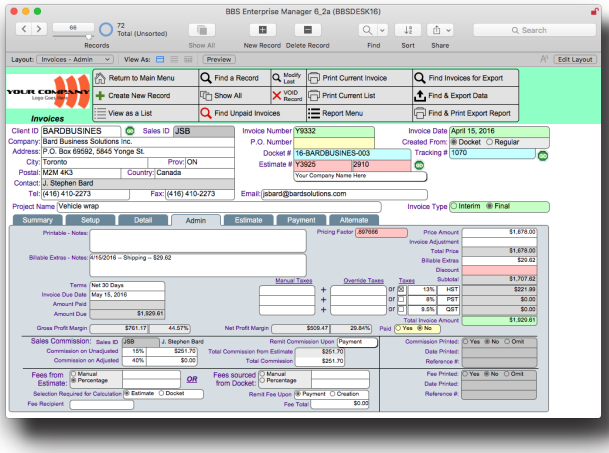
• generate and track all outside purchases
• PO numbers are automatically generated
• multiple items can be entered and linked to one or multiple dockets
• estimated items that are outside purchases to a supplier, a purchase order can automatically be generated and linked to the appropriate docket
• vendor invoices can be entered against the PO, as



well as payment information
• aged payables
• past due & open purchase orders can be quickly found

Invoices

• generate and track billing information to your clients
• invoice numbers are automatically created
• invoices can be generated from dockets with all



the relevant information and amounts automatically entered for you, based on estimates or actuals
• you can generate multiple invoices for each docket as needed
• payments, sales commissions, fees are all recorded
• aged receivables

Reports

• over eighty-five reports already setup for your use
• reports are generated from within each database section based on the current record or the current found set of records
• sales reports for estimates, dockets and invoice levels
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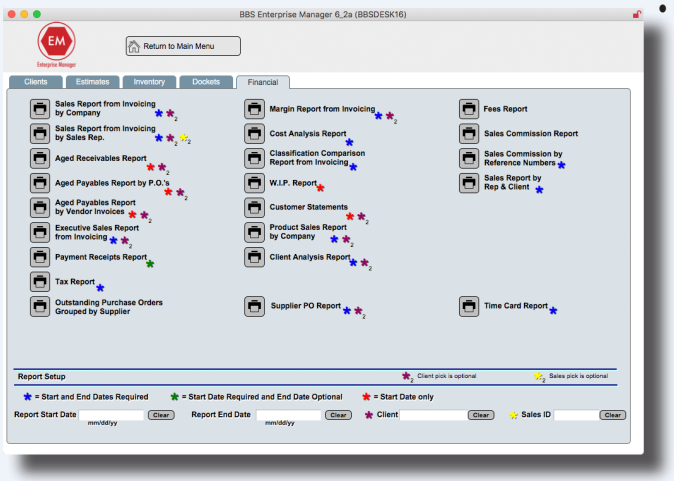
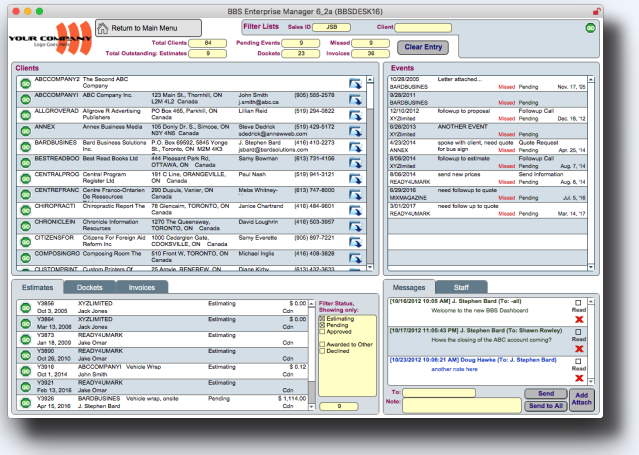


many reports allow you to select a start and end dates for a range of records
• includes aged receivable and aged payable reports
• some reports allow you to optionally select a single client code to filter the report printouts

Dashboard

• the Dashboard allows you view all your clients
• view and edit all your pending events
• auto filters for current estimates, dockets and invoices



• private message board to other staff and file transfer

Efficient Information Flow Is Important To The Success Of Your Business

We build customized Databases To Suit Your Business...

Bard Business Solutions Inc. is a solution provider for all your customized database needs since 1995. -- Why? Because off-the-shelf software does not do business the way you do business.

The Bard Business Solutions Inc. Mission Statement

To provide solutions to companies and individuals who need the accurate processing of information using PC or Macintosh technology through the implementation of customized databases.

After all, information flow is instrumental in the success of most businesses today.

Philosophy

Enter data once and use it many times. Error-prone paper processes are eliminated through seamless integrated connectivity.

One program is used to manage your entire company.

The Enterpirse Manager allows you to enhance your client service and increases speed and accuracy from estimates to invoices.

Save time and resources as well as work smart and more efficiently.

EM
Enterprise Manager

Platforms

The Enterprise Manager is developed in FileMaker® Pro and runs on the Windows, Mac OS, and the iPad OS platforms for a multi-user environment, and comes bundle with FileMaker® Pro.

System Requirements

Please see our website for the latest version and system requirements.

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