

Hyphen Solutions, Ltd.

# An Introduction to SupplyPro



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# Contacting Customer Care

Support for Build Pro is available from the Customer Care Center and online.

## Customer Care Center

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Telephone 1-877-508-2547

After Hours 1-877-508-2547

Fax (972) 818-8850

Hours You can reach the Customer Care Center Monday through Friday, 7am to 7pm, Central Standard Time.

Email Email us directly at [support@hyphensolutions.com](mailto:support@hyphensolutions.com)

## Hyphen Solutions, LTD.

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For more information about HyphenSolutions, Ltd. and our other products, please visit our web site [www.hyphensolutions.com](http://www.hyphensolutions.com), or call **1-800-To-Build** (1-800-862-8453).

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# Introduction

## What SupplyPro Can Do For You

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### About SupplyPro

SupplyPro, in conjunction with Hyphen Solutions, Ltd.'s Build products, gives building industry suppliers and subcontractors the power to manage orders and communications with builders instantly, via the Internet. BuildPro is seamlessly integrated with SupplyPro, providing materials lists and supplier information directly from the SupplyPro database.

SupplyPro allows contractors, LBM dealers, distributors and manufacturers to eliminate much of the paperwork associated with managing orders, including the entry, coding and selection errors that accompany the process, by receiving purchase orders and sending invoices electronically. Firms using SupplyPro can monitor every construction project assigned to them, with real time updates. SupplyPro companies find they speed up their receivables by being able to track shipments and confirm deliveries electronically when they happen. If there is a problem, users know about it instantly, not 30 days later when the check doesn't arrive. Plus, by seeing the construction project schedule from the day the project is started, SupplyPro provides accurate inventory projections that detail when products and services will be required.

With SupplyPro, you have immediate access to all orders placed by your builders. You can use SupplyPro to manage Received, Rescheduled and To Do orders, making communications with builders quick, easy, and more accurate. Forecasting reports predict future potential builder orders, and order history reports track order and item trends over time.

And, with SupplyPro, your company is listed in the supplier catalog of every BuildPro user in your market. SupplyPro gives you high visibility in the BuildPro builder communities and reduces workload for both builder and supplier by eliminating a manual, paper-intensive process.

## Benefits of SupplyPro

Some of the key benefits of using SupplyPro are listed below:

- Manages all of your customers and orders and frees sales staff from non-sales activities
- Reduces the amount of paperwork and the number of phone calls required to log orders by providing total electronic collaboration between builders and suppliers
- Helps eliminate data entry errors and streamlines the order procedure
- Saves time required to manage orders
- Allows you to operate your business 24/7, with an Internet-based solution that offers access to your order pipeline - all day, every day
- Provides material and labor forecasts
- Provides access to up-to-date job schedules from BuildPro so that you can monitor and confirm your scheduled deliveries or job start dates, avoiding dry runs or false starts

## Features of SupplyPro

In this chapter the following tasks are covered. Click a task name to go to that section.

- System integration - connects builders to suppliers and dealers through the BuildPro/SupplyPro relationship.
- Intelligent solutions - valuable data, including the builder's construction schedules and future needs is easily accessible.
- Order Management - review and act upon Received, Rescheduled, To Do, Complete, and Alert orders. Email and/or fax notifications in addition to real-time order management workflow.
- Reports and Forecasting - keep track of your past business using order history reports or take a look into the future with forecasting reports and potential order reports. View customers' up-to-date job schedules.

## Note

Depending on your company's SupplyPro implementation and applied security restrictions, you may find that you do not have access to all reports or application pages documented in this help system. If you find you are unable to access specific features that you should, please contact your in-house system administrator.

## About This Guide

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### Contacting Customer Care

Support for SupplyPro is available from the Customer Care Center and online.

**Telephone:** 1-877-508-2547

**After Hours:** 1-877-508-2547 or 1-972-728-8180

**Fax:** (972) 818-0992

**Hours:** You can reach the Customer Care Center Monday through Friday, 7am to 7pm, Central Standard Time.

**Email:** Email us directly at <mailto:support@hyphensolutions.com>.

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### How to use this manual

The SupplyPro User Guide contains step-by-step procedures on how to use the Hyphen SupplyPro web application. This document is written for trained users and assumes familiarity with the application's user interface. This document is not a tutorial or training manual.

### Icon Descriptions

The following icons may appear in this manual:



The note icon highlights additional information related to a step.



The caution icon advises that failure to take or avoid a specific action will result in damage to or loss of data.



The reference icon denotes a third-party source for additional reference information.



The telephone icon notifies readers that they should call the Customer Care Center for additional assistance.

## Document Conventions

To present procedural information in a clear and concise manner, we use the following formatting conventions:

|  |   |
|--|---|
| Field entries  | Appear in <i><b>bold italics</b></i><br>"Type <i>y</i> or <i>n</i> in the <b>Post Now</b> field"                      |
| Box or on-screen messages                                | Appear in <i>italics</i><br>"Do You Wish To Proceed With This Program?"   |
| Function keys  | Appear in SMALL CAPS<br>"Press ENTER or NEXT BLCK"  |
| Fields, screens, reports, journals, lists, buttons, etc. | Appear in <b>bold, Initial Caps</b><br>"In the <b>Projects</b> screen, type <i>sp001</i> in the <b>Project</b> field" |
| Programs, processes, files, features                     | Appear in Initial Caps<br>"Accounts Payable program"  |
| Modes  | Appear in CAPS<br>"In ADD mode, type the company identification code"   |

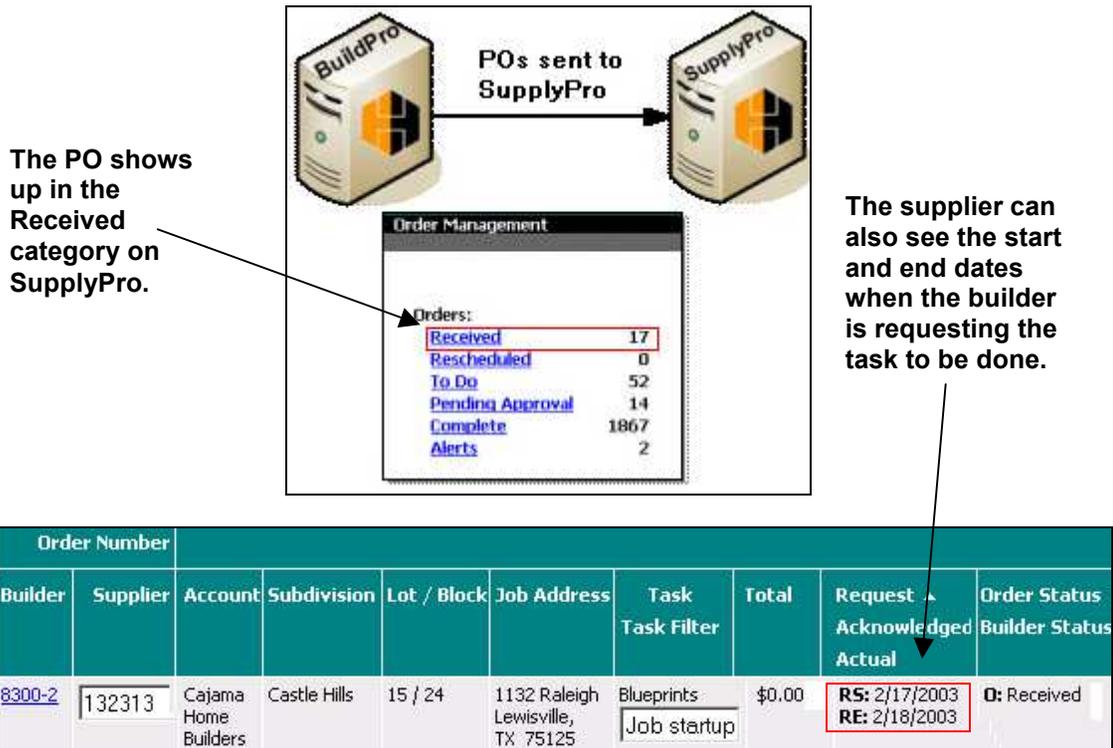
## Overview of SupplyPro

### Introduction

SupplyPro works in conjunction with BuildPro to give you a tool to easily check each day the status of a pending job or new job requests, as well as schedule changes and notes from the builder. SupplyPro also lets you receive, view and print purchase orders electronically., eliminating the problems that accompany fax transmissions. The system also streamlines the payment process. Once a builder verifies the job as complete, payment is automatically initiated.

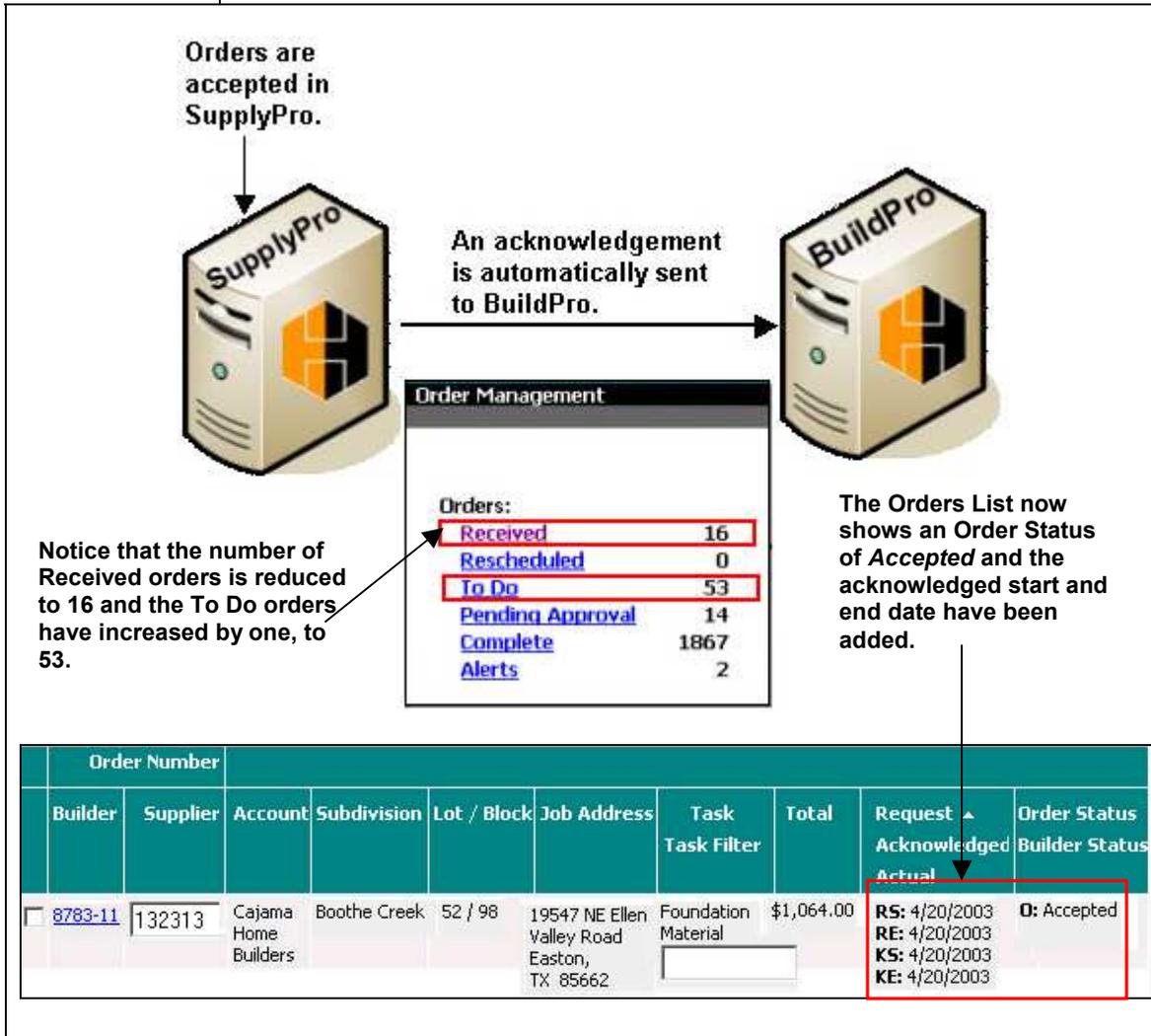
### Receiving orders from BuildPro

In BuildPro, a Construction Manager (CM) can see all tasks for a particular day on their To Do list. They can also see tasks that need to be started or to be completed. From several places within BuildPro, a CM can submit an order to a supplier. The purchase order is sent electronically to SupplyPro and is listed as part of the supplier's *Received* orders.



### Accepting orders in SupplyPro

You have two basic tasks to perform on a regular basis: accept orders and complete orders. When you accept (or acknowledge) an order from the builder, the order status is changed from *Received* to *Accepted*. The accepted order is moved to the To Do category. Also, an acknowledgement is sent to the builder. The builder sees the acknowledgement when they view the order in BuildPro.



## Shipping orders from SupplyPro

When you complete an order, or when requested materials are delivered, you go to the To Do list and mark the order *Complete*. Two things happen: the Order Status is changed to complete and the actual start and end dates are added to the order. Also, an alert is sent to the CM in BuildPro that the supplier has completed the task. Now, the CM needs to walk the job and approve the work or validate that the materials have arrived.

When you complete an order, it goes to Pending Approval until the CM marks the order *Complete* in Buildpro. Then, the order moves to the Complete category.

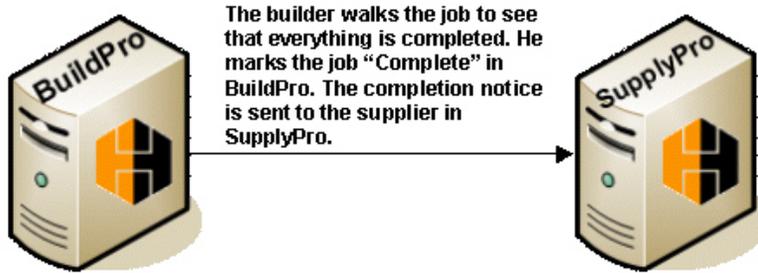
You complete the order in SupplyPro.



**Receiving orders in BuildPro**

When the CM walks the job and sees that the work has been completed, or materials have been delivered, then they mark the task as *Complete* in BuildPro. This triggers two actions:

- The completion notice is sent to the supplier in SupplyPro. This decreases the number of orders in the Pending Approval category, and increases the number of orders in the Complete category.
- The completion is sent from BuildPro to the builder's ERP or accounting system, triggering the payment mechanism.



The order is moved from the Pending Approval category to the Complete category. Also notice that the Builder Status of Complete now appears on the Orders List.

| Order Management |      |
|------------------|------|
| Orders:          |      |
| Received         | 16   |
| Rescheduled      | 0    |
| To Do            | 51   |
| Pending Approval | 14   |
| Complete         | 1869 |
| Alerts           | 2    |

| Buy                            | Lot / Block | Job Address     | Task<br>Task Filter   | Total                                   | Request ^<br>Acknowledged<br>Actual | Order Status<br>Buyer Status |  |                            |
|--------------------------------|-------------|-----------------|-----------------------|---|-------------------------------------|------------------------------|--|----------------------------|
| <input type="checkbox"/> 31002 | 12-430-763  | Sublet<br>Homes | NorthPark I<br>25 / A | 3100 Patriot Dr.<br>Dallas,<br>TX 75003 | Interior Paint<br>Bob - Interior    | \$1236.00                    | RS: 4/27/2004<br>RE: 4/29/2004<br>KS: 4/29/2004<br>KE: 4/29/2004<br>AS: 4/27/2004<br>AE: 4/29/2004 | O: Complete<br>B: Complete |

## Using Hyphen SupplyPro

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### Introduction

SupplyPro's features are organized under the tabs listed below.

### Explanation of each tab

**Home:** The Home tab shows a quick glance at today's current activities. It also provides links to SupplyPro enhancements and update documentation.

**Orders:** The Orders tab provides you with tools for managing builder orders and jobs.

**Reports:** The Reports tab allows you to generate reports to help you keep on top of current order activity, order history, job status, scheduling, and forecasting.

**Manager:** The Manager tab is where you manage system users, security roles and builder accounts.

### Common Application Functions

The following common functions are accessible from any SupplyPro application page:

- To access the Home page, click the **SupplyPro logo** at the top left, or the Home tab.
- To move from tab to tab, click on the appropriate tab name.
- In addition to links on the main tab pages, the left navigation bar also lists all features available from the current tab. To access a specific feature, you can click either the links on the main tab page or the links on the left navigation bar.
- To access the Webhelp, click the **Help** link in the right-hand corner of any application page.
- To move from field to field when adding information, use the TAB key. If you use the ENTER key, SupplyPro assumes you have finished filling out the form and tells you about the required fields you neglected to complete. Required fields are identified by a red arrow, .
- To sign out of SupplyPro, click the **Sign Out** link located in the left navigation bar or at the page bottom.

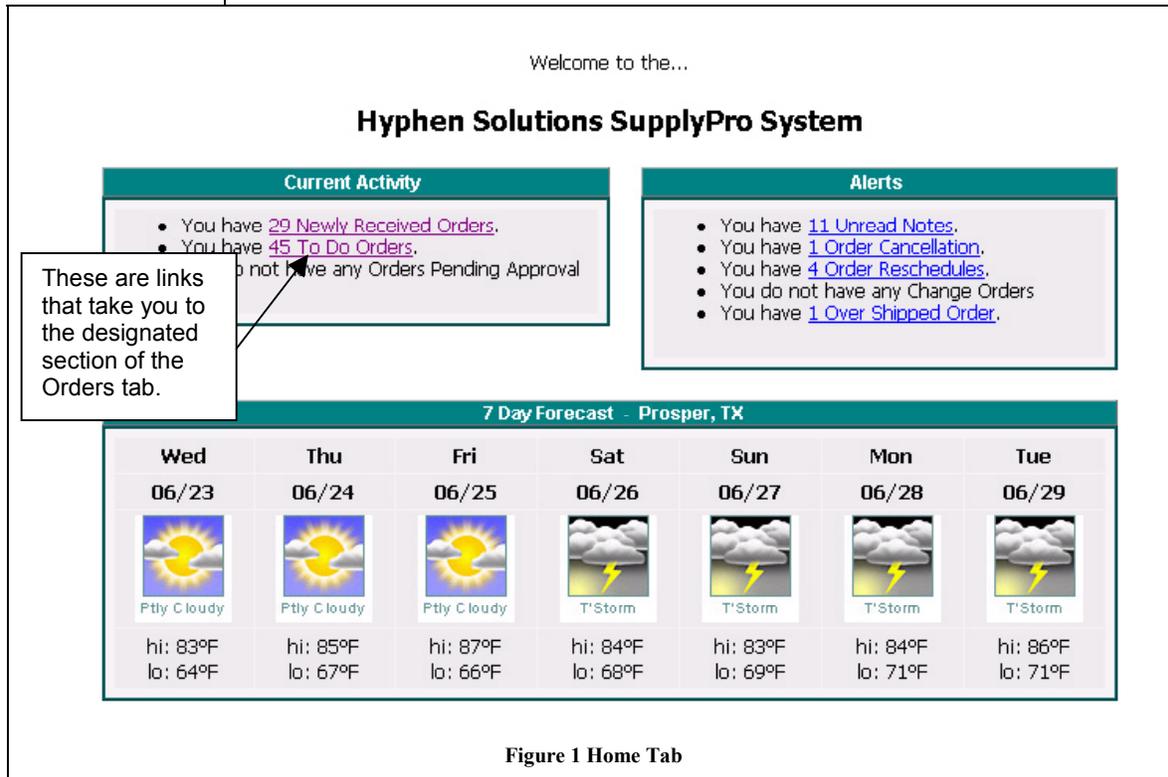
### NOTE

Depending on your company's SupplyPro implementation and applied security restrictions, you may find that you do not have access to all application pages or functions documented in this help system. In addition, your user ID's security restrictions may limit the builder accounts you are able to view. If you find you are unable to access specific features or data that you should, please contact your in-house system administrator.

## Navigating the Home Tab

### Introduction

The Home tab is the application's default page, the first page you see each time you log into SupplyPro. This page gives you a quick glance at today's activities. The Home page is divided into the following sections:



### Current Activity

The Current Activity section provides links to the following types of orders:

- **Newly Received Orders** submitted from builders
- **To Do Orders** pending shipment/completion
- **Pending Approval** orders are awaiting completion by the builder

### 7-Day Forecast

The 7-Day Forecast section is provided by Intellicast Weather. It displays the predicted conditions and high and low temperatures for the next week.

### Other navigation tips

The Home tab's left navigation bar show has links to Sign Out of SupplyPro and for the Enhancements and Updates communications on the Hyphen Solutions, Ltd. web site.

## Understanding the Orders Tab

### Introduction

SupplyPro's Order Management tab is where you manage your orders by providing access to a variety of order/task list views and order details such as billing and shipping information, job location, order changes, builder notes, and order history status.

You can click any of the hyperlinks on the Order Management page to see more detailed information on any order. At the top of the page are links to various groupings of orders. Also, a listing of any jobs with active orders is towards the bottom of your screen. You can click any active orders link to see the Order Detail page.

**Order Management**

**Orders:**

[Received](#) 34

[To Do](#) 55

[Pending Approval](#) 0

[Complete](#) 9

[Manual Order Entry](#)

[Order Search](#)

**Alerts:**

[Unread Notes](#) 10

[Cancellations](#) 0

[Reschedules](#) 4

[Change Orders](#) 0

[Over Shipped Orders](#) 0

| June 2004 |    |    |    |    |    |    |
|-----------|----|----|----|----|----|----|
| S         | M  | T  | W  | T  | F  | S  |
|           |    | 1  | 2  | 3  | 4  | 5  |
| 6         | 7  | 8  | 9  | 10 | 11 | 12 |
| 13        | 14 | 15 | 16 | 17 | 18 | 19 |
| 20        | 21 | 22 | 23 | 24 | 25 | 26 |
| 27        | 28 | 29 | 30 |    |    |    |

**Jobs with Active Orders:**

W.K.E. Construction

- [01202004wke \(HOLD\)](#)
- [01222004wke](#)
- [02032002wke](#)

Figure 2 Order Management

## Key terms

The Orders section includes links for managing your orders by status:

**Received:** This link takes you to the Received Orders list. Received orders are orders submitted to your company through BuildPro. Once an order is received, it must be Accepted or Declined.

**Rescheduled:** This link takes you to the Rescheduled Orders list. Rescheduled orders are accepted orders that are rescheduled by the builder in BuildPro. These orders must either be re-accepted or declined by the supplier.

**To Do:** This link takes you to the To Do Orders list. To Do orders are orders received and accepted by the supplier pending shipment.

**Pending Approval:** This link takes you to the Pending Approvals list. Orders pending approval are those orders shipped and marked complete by the supplier, but not yet marked complete by the builder.

**Complete:** This link takes you to the Completed Orders list. Completed orders are shipped orders marked complete by both the supplier and the builder.

**Alerts:** This link takes you to the Alert Orders list. Alerts are orders requiring additional attention.

**Assign Orders:** This link is for companies with the Orders by User module implemented. This link accesses the Assign Orders page, which supports the ability to assign individual orders to specific users, rather than automatically assigning orders to the users linked to the builder account. This is an *optional* feature in SupplyPro.

**Manual Order Entry:** This link provides a step-by-step form to manually enter builder orders for existing accounts.

**Order Search:** This allows you to quickly search for orders by order numbers, lot numbers, block numbers, account, subdivision or order status.

## Jobs with Active Orders

The Jobs with Active Orders section lists builders and jobs for which there are active orders in your system. Click a job link to open the Job Summary page. Then, from the Job Summary page, you can see all active orders for the job.

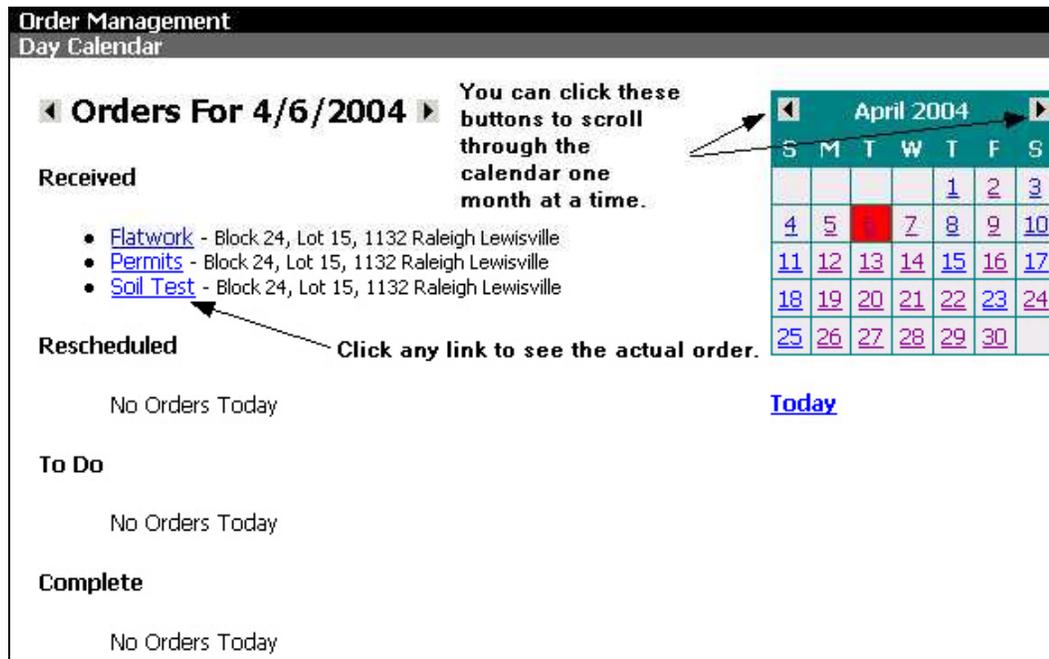


Figure 3 Day Calendar

**Calendar**

The Day Calendar provides a view of all Received, Rescheduled, To Do and Complete orders on a given day, with an option to scroll one day forward or backward.

## Using SupplyPro Reports

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### Introduction

The SupplyPro Reports tab provides a series of summary and detail management reports to help you keep on top of current order activity, job schedules, product forecasting, and order history. You can click on either the links on the main Reports tab page or the links on the left navigation bar to access any report.

Your user ID's applied security restrictions may limit the builder accounts you are able to view on reports. If you find you are unable to access information that you should, please contact your in-house system administrator.

**Reports**

**Current Activity Reports:**

1. [Order Summary](#)
2. [Order Approvals](#)
3. [Orders Pending Approval](#)
4. [Order Calendar](#)
5. [Order Payments](#)

**Historical Reports:**

1. [Order History](#)

**Forecasting Reports:**

1. [Forecast](#)
2. [Potential Orders](#)
3. [Job Schedule](#)
4. [Task Schedule](#)

Figure 4 Reports Tab

**Current Activity Reports**

Current Activity Reports provide a summary of orders for active jobs:

|                                |   |
|--------------------------------|---|
| Order Summary Report           | Lists all orders for the current month by order status and builder account.   |
| Order Approvals Report         | Shows all orders marked complete by the builder.  |
| Orders Pending Approval Report | Lists all orders marked shipped or complete by the supplier, but not yet marked complete by the builder.                      |
| Order Calendar Report          | Provides a convenient calendar view of scheduled orders by start date, including job address, and order and task information. |
| Order Payments Report          | Lists all orders approved for payment by the builder in BuildPro.   |

**Forecasting Reports**

Forecasting Reports predict future, potential orders based on information from Build and BuildPro. These reports assist you in managing or forecasting inventory to meet future builder demands.

|                         |   |
|-------------------------|---|
| Forecast Report         | Predicts product demand, showing items that might be ordered based on yet-to-be-submitted builder orders in BuildPro.       |
| Potential Orders Report | Shows potential orders based on yet-to-be submitted builder orders in BuildPro.   |
| Job Schedule List       | Lists current active jobs with potential orders by start date, oldest jobs first.   |
| Job Schedule            | Accessible from the Job Schedule List, this report provides a complete job schedule with all tasks.                         |
| Task Schedule           | Shows current active jobs with potential orders by start date, oldest jobs first, including the complete job task schedule. |

**Historical Reports**

Historical Reports provide a graphical representation of your current and prior year's orders by month, including a drill-down capability for analyzing specific order item history.

**Order History Report**

Displays a graphical representation of order activity for all accounts for the current year by month.

**Order Item History**

Accessible from the Order History Report, this monthly report shows items ordered, the number of units ordered, and the number of units shipped.

## Using the Manager Tab

### Introduction

SupplyPro's Manager tab provides all of the functions needed to manage your company's profile, user security roles, user names and builder accounts.

**Manager**

### System Setup and Maintenance

From this screen you can perform all the functions necessary to setup and/or make any ongoing changes within the system.

Click on the links below (or the left navigation bar) to access each function:

|    |                                 |                               |
|----|---------------------------------|-------------------------------|
| 1. | <a href="#">Company Profile</a> | Edit Your Company Information |
| 2. | <a href="#">Security Roles</a>  | Manage Your Security Roles    |
| 3. | <a href="#">User Manager</a>    | Manage Your System Users      |
| 4. | <a href="#">Account Manager</a> | Manage Your Account List      |

**Figure 5 Manager Tab**

### Key terms

The Manager page shows the following options.

**Company Profile:** This section lets you edit your company's contact information.

**Security Roles:** This section lets you manage security roles for SupplyPro users.

**User Manager:** This section lets you to update your system user information, assign security roles, and establish passwords. To add a new user to the system, please contact Hyphen Solutions, Ltd. Customer Care.

**Account Manager:** This section shows your account list and allows you add new builder accounts.

### NOTE

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