

# UNDER CONSTRUCTION

C/F Data Systems, LLC Quarterly Newsletter

July 2013

## From the President

### The new STRUCTURE Work Order module is ready for general release!

If you already own the Work Order program, we have scheduled several dual session training webinars in July, August and September. Please refer to the Summer Calendar on page 5 of this newsletter to select the session you wish to attend. The webinars are limited to twenty-five attendees each, so if you are interested let us know and we can schedule you, just email me at [eric.goldstein@cfdatasystems.com](mailto:eric.goldstein@cfdatasystems.com) and let me know which one you would like to attend.

The changes to the Work Order module are significant enough to warrant this additional training. We will only release the upgrade to your company after someone has participated in the training webinar. If you are unable to attend any of these sessions, you will have to wait for the next User Group meeting, or if you prefer, you can schedule a private class just for your company, but there would be a charge for this.

Several of our Work Order customers have expressed interest in the **STRUCTUREmobile** program which allows the field service technicians to interact with the system using an iPhone, iPad, or any Android device. In order to acquire this new technology, you must first have been trained on, and installed the new Work Order module.

### If you don't currently own the Work Order module, perhaps you should consider taking a look.

If your business has a service component, the Work Order module really helps to manage it more efficiently.

Work Orders allows you to create an order when the customer calls and generate a physical piece of paper to hand to the service person complete with instructions. (Or with **STRUCTUREmobile**, you can issue the call to their device electronically.)

You can dispatch the call and easily manage the service schedule with the new dispatch board that allows you to view a day, a week or even a month at one time.

If you have service contracts with your customers, you can set up recurring billing, schedule preventive maintenance, and track service history.

If you work on specific pieces of equipment at the customers' sites, you can even track the history of work right down to the unit.

Of course Work Orders is tightly integrated in to the rest of the system: Job Cost, Purchase Orders, Accounts Receivable, Inventory (by truck), and General Ledger.

If you are interested in getting a personalized Work Order demonstration, just give me a call or drop me an email.

Have a Great Summer! And GO BRUINS!

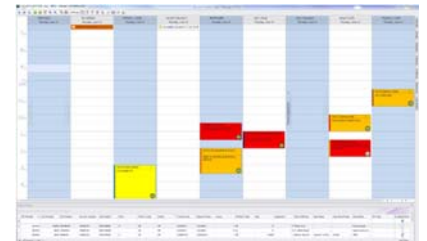
*Eric Goldstein*

**Eric Goldstein, President**



*“You can dispatch the call and easily manage the service schedule with the new dispatch board that allows you to view a day, a week or even a month at one time....”*

*- Eric Goldstein*



*Example of new WDS screen. Visit [www.cfdatasystems.com/wds.jpg](http://www.cfdatasystems.com/wds.jpg) to see a full-size sample.*

## In This Issue

- New Support Team Member
- Running the Client Install
- Spotlight
- Summer Calendar
- Closing the Month & Quarter
- New Work Order Prep
- Month End Close - GMC
- Marketing News



Mary Ellen looks forward to working with STRUCTURE customers.

## New Support Team Member

**Mary Ellen Davis** has recently joined our customer support team, and we are very glad to have her.

She has had extensive accounting and bookkeeping experience over her career, and had managed the office of a specialty subcontractor for many years.

She has a very positive attitude and is working very closely with Jena and the rest of the support team to get up to speed on STRUCTURE.

We hope you will have the pleasure of speaking with her sometime in the fall; please make sure to welcome her to the team when you do.

## Upgrades & Patches

Please check the Website <http://support.cfdata.net> on the first of every month to see if we have an updated version.

**As always, if there is anything critical, you will receive an email.**

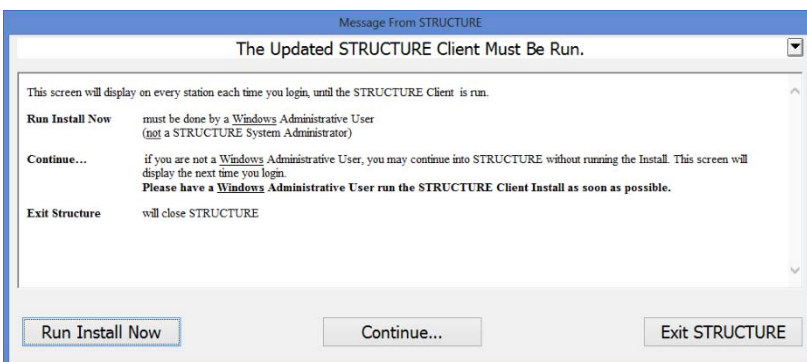
As of right now, unless you are a Work Order BETA, you should update to Version 15.01.15. If you are a Work Order BETA, you should update to 15.08.07 (contact Support for the link). Make <http://support.cfdata.net> a favorite in your web browser. You can check it anytime.

## Don't let this reminder 'nag' you

The screen below will display the first time you open STRUCTURE on your machine, and will display each time you open STRUCTURE, until you run the Client Install.

We've seen cases where customers ignored this screen for a long period of time, and encountered issues with STRUCTURE, such as printing problems.

Simply have a Windows Administrator log in to your work station, launch Structure, and click the **[Run Install Now]** button, and *voila!*, you will never see the message again.



Does this screen look familiar? If so, be sure to run the Client Install.

## Starnet Rebates

Starnet members who would like to take advantage of our new programs for tracking the rebate amounts due from Starnet are welcome to attend our webinar on July 25 at 10am.

Space is limited, so please contact [doug@cfdatasystems.com](mailto:doug@cfdatasystems.com) to reserve your spot.

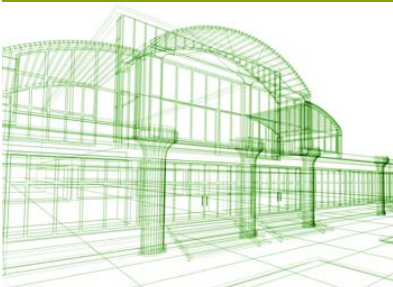
Payroll Tips

# Welcome New Customers

We are fortunate to have several new additions to the C/F Data family this quarter.

Please join us in welcoming:

- **Xebec Marketing**  
Alberta, Canada
- **TSI/Commercial Floor Covering**  
Champaign, IL
- **Pacific Carpets**  
Huntington Beach, CA
- **J P Salmini Co.**  
Milford, CT



## Watch dates when closing Month & Quarter

While we love to help you with all your STRUCTURE needs, we also like to help you avoid costly mistakes. Does anyone remember 1st quarter 2013?

When closing your Monthly and Quarterly Payroll (*EMU - Prl Month End Close & EQU - Payroll Quarter End Close*), please be careful when entering the dates you use to close your month or quarter.

In the examples below, I am closing the month of June 2013. My work week starts on Sunday and ends on Saturday. My pay day is Tuesday.

June							July						
S	M	T	W	T	F	S	S	M	T	W	T	F	S
						1		1	2	3	4	5	6
2	3	4	5	6	7	8	7	8	9	10	11	12	13
9	10	11	12	13	14	15	14	15	16	17	18	19	20
16	17	18	19	20	21	22	21	22	23	24	25	26	27
23	24	25	26	27	28	29	28	29	30	31			
30													

### For EMU Month End Reports & Update:

Starting Date of Next Period = 06/23/13: 1<sup>st</sup> work day of my 1<sup>st</sup> July payroll week.

(W/E 6/29/13 will be paid on 07/02/13)

Ending Date of Next Period = 07/27/13: Last week ending date that will be paid in July.

(W/E 07/27/13 will be paid on 7/30/13)

### For EMU Month End Union Reports & Update:

Next Union Period Starting Date = 06/23/13: Should be same as above.

Next Union Period Ending Date = 07/27/13: Should be same as above.

### For EQU Quarter End Report & Update:

Next Quarter Ending Date = 09/21/13

W/E 9/21/13 is the last payroll week that will be **PAID** in September. (Because my pay day is Tuesday, W/E 9/28/13 checks will be cut 10/1/13.)

If I forget to close the month and/or the quarter and try to update my W/E 9/28/13 payroll, I will get a message that I must run the EMU and/or the EQU first.

September						
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					





Erin likes turtles

Each issue, we spotlight one of our staffers to help you get to know the team here at C/F Data Systems.

## Spotlight - Erin Dzierzak

**Title:** Customer Support

**Joined the team:** November 2011

**Hobbies/Interests:** Singing, reading, camping, and knitting.

**Fondest memories at C/F:** A very funny birthday confetti incident that backfired on the person who had planned it. I was asked to throw confetti for a co-worker's birthday, but when it came time to celebrate we gathered in the office of the person that had put me up to it. His office was then covered in confetti. Because I wouldn't help him clean it there was some retaliation aimed at my Batman Legos, but nothing that couldn't be fixed.

**Key motivation for staying here so long:** Has it been long? This is a great group of people to spend my day with. Plus, we always seem to have birthday cake.

**Brief Bio/Comments/Thoughts:** Born and raised on Cape Cod I feel that I literally grew up under a rock. I feel that I have gained a little more 'street smarts' the closer I get to the big bad city and the more time I spend with my husband. I spent a few years living in Pennsylvania and Florida, but quickly decided to return to New England.

I came to C/F Data after a much too long stint in the banking industry, and now I am happy when I come to work every day.

My favorite hobby is singing. I studied opera in college and for those who may know what this is I am considered a Coloratura soprano (acrobatic high notes for those who don't know much about singing). My favorite pieces to *attempt* were always the "Queen of the Night" arias from Mozart's *Magic Flute* and the twenty third movement from Carl Orff's *Carmina Burana* "Dulcissime". While I no longer study opera frequently, I do enjoy experiencing opera and try to sing as often as possible. I sing with a wonderful group in Easton, MA called Jubilate Chorale. We have a great mix of voices and tackle great pieces for our performances.

## Month End Close - GMC

No one in your office should be updating when you are closing the month in General Ledger.

Send a friendly reminder to those employees who run **VRR, VRR, VCU, ASU, ACU, ARR, EWU, JSU, JBU, JIU, WBU, WIU** – to "Please hold off all updates until further notice – closing the month – Thank You!"

(Don't forget to let them know when it is safe to do so!)



## New Work Order Module Preparations

After extensive testing by our Betas, we hope to be unveiling the new Work Orders to all in the next few months.

Now is the time to begin preparing.

### Some things to do now:

- ◇ Run an Open Order Report – WOO
- ◇ Determine if these calls are truly open.
- ◇ If calls are not open Purge them or Bill them as N/C for History:
  - ◆ WWF will purge Work Orders through a particular Date.
  - ◆ WWR will purge Work Orders for a range of Work Order #'s.
  - ◆ WBU to print a no-charge invoice to keep history.

## Summer Calendar

### Holidays

- ◇ July 4 - Independence Day
- ◇ August 9 - C/F Summer Outing
- ◇ September 2 - Labor Day

### Webinar Classes:

- ⇒ July 10/11 - 2-4pm  
New Work Orders  
Webinar
- ⇒ July 24/25 - 2-4pm  
New Work Orders
- ⇒ July 25 - 10am -  
Starnet Rebate  
Webinar
- ⇒ August 7/8 - 2-4pm  
New Work Orders
- ⇒ August 8 -  
Accounts Payable
- ⇒ August 22 -  
Project Management
- ⇒ September 12 -  
Weekly Payroll
- ⇒ Sept. 18/19 2-4pm  
New Work Orders
- ⇒ September 26 - Job  
Cost - Contract Billing

Webinar Times: 9am-12pm  
EST

Cost \$100/hour

Visit [support.cfdata.net](http://support.cfdata.net) for a full list of classes and descriptions.

Email  
[doug@cfdatasystems.com](mailto:doug@cfdatasystems.com)  
to sign up to attend a class.

### July

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	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	31			

### August

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				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	31

### September

Sun	Mon	Tue	Wed	Thu	Fri	Sat
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					

Additional individual, group, and online classes are available.

Please inquire with us if you would like to schedule a class not already listed on the calendar.

## C/F Data Support

Email:

[support@cfdatasystems.com](mailto:support@cfdatasystems.com)

Phone: (800) 370-HELP

Fax: (781) 337-9991

Phone lines are open from 8:30am to 5:00pm Monday thru Friday (EST).

Email support is available from 8:30am to 7:00pm Monday thru Friday (EST).

Our goal is to respond to your call within 30 minutes. If you do not hear back within 1 hour, please call back.

Support may not be available at the following times:

**Weekly Meeting:** Monday 9:45am to 10:30am (EST).

**Monthly Meeting:** July 12 11:30am to 3:30pm (EST). August/September TBD.

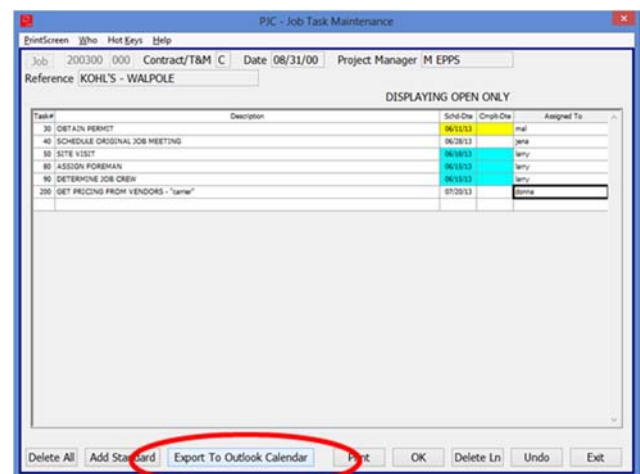
## Tips and Tricks

### Send tasks to a user's Outlook Calendar

In Project Management Version 15, have you taken advantage of the new feature to assign a task to a user?

Use the information for reporting purposes, or click on [Export to Outlook] to update the task list to your calendar, as well as anyone the tasks are assigned to.

For a full review of the Project Management module, be sure to attend our webinar on August 22.



## Your invoices from C/F Data

C/F Data Systems sends out invoices monthly, either physically or via email. Sending them by email is faster, more efficient, and saves time, paper and money.

If you do not receive your invoice, by email or physically, please let us know so we can be sure we have the correct address.

**If your email or physical address changes, we need to know.**

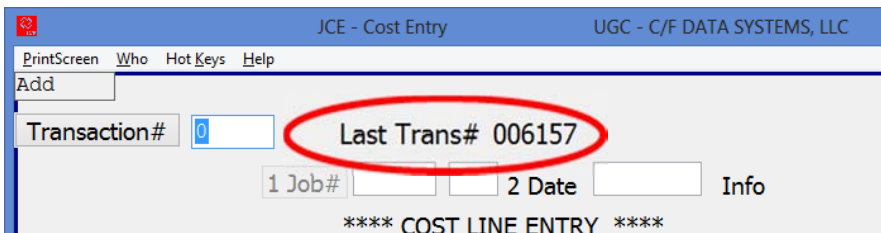
To start receiving your invoice via email, please let Gary know at [gary@cfdatasystems.com](mailto:gary@cfdatasystems.com).

**Gary Brewer, Accounts Receivable**

## Long-time customers take note

Please take a moment to check the last Transaction # in Job Cost.

STRUCTURE holds 999,999 cost records. If your first digit is an 8 or a 9 please call Support to come up with a plan of action before your #'s roll over.



Purging is definitely one of the options we will discuss.

**What is Purging?** The removal of Data files from STRUCTURE.

**Why Purge?** To speed up inquiries, searches, some reports. Clean up what you see on reports. To avoid issues with transaction numbers rolling over.

**How often should you Purge?** Obviously, all companies are different, but an average company has no more than 4 years of data saved in STRUCTURE.

**What if I need to see that old data?** Before purging, you could buy an Archive Company. We would set up security so that only Inquiries and Reports would be accessible.

Please call Support if you have any questions or concerns with space or speed.

## Webinar Sessions

Are you a new employee?

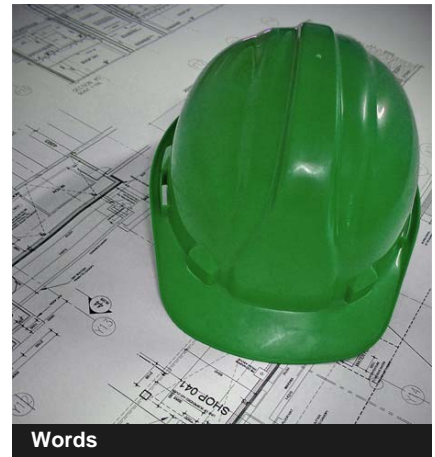
Do you need a refresher course?

Do you want to start cross-training in your office?

Check the Summer Calendar for a list of webinars available.

Contact

[doug@cfdatasystems.com](mailto:doug@cfdatasystems.com) to sign up.



**SUPPORT CALLS**

800-370-HELP (4357)

**Q: I have a discrepancy with my AIA billing. What should I do?**

A: Support can help you, but it's easier for us to identify and solve the problem with visual aids, so we can see what is going on in your system. You can email or fax us a copy of the AHR—Customer's Invoice by Date for that customer and job, along with a copy of the G702 and G703, and a detailed description of what the discrepancies are. This will allow us to review and troubleshoot more efficiently.

## Customer Corner

We've been sending a newsletter to all of our customers for over 30 years. Since most customers now read it electronically, we made some changes to the layout. We hope you like it.

We reviewed recent and old newsletters, to make sure we were keeping the spirit of the old, while trying to make it 'fresh'.

The idea of the newsletter is to provide you with news, tips, tricks, and useful information regarding STRUCTURE.

Each month we solicit our developers and Support staff for common issues or trends that may be worth reporting.

If you have a tip, trick, or idea you think other STRUCTURE users may find helpful, send it to: [doug@cfdatasystems.com](mailto:doug@cfdatasystems.com)



## Special Programming

Summer time is a busy time, filled with graduations, weddings & cookouts.

And we at C/F Data are busy too!

With our ever expanding customer base and the many diverse industries we are now serving, we have seen a significant increase in customer requests for special programming.

While we certainly want to meet all of your unique requirements, please keep in mind that there may be other customer requests ahead of yours.

Our current programming rate is \$150.00 per hour, with a minimum of four hours, and currently the expected delivery time is 12 – 16 weeks.



If you feel your request is of an urgent need, please let us know. We will review your request and if it is determined that it is urgent, we may be able to offer you an expedited rate and delivery time.

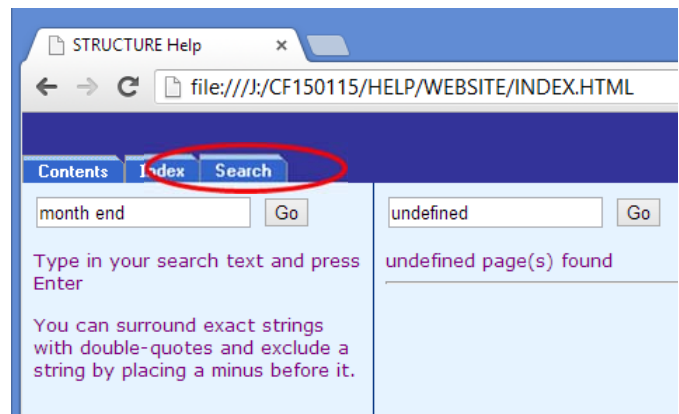
To request special programming, use this form: <http://support.cfdata.net/Files/specialrequest.pdf>, or email [theresa@cfdatasystems.com](mailto:theresa@cfdatasystems.com).

**Theresa Esposito, Special Programs Representative**

## Using 'Search' in Help

If you click "?" on the Structure Tool Bar, the Help application opens in your browser, displaying the Structure Help screen.

If you have trouble using the [Search] tab, such as receiving an 'UNDEFINED' message when typing in a Subject, you may need to change your default browser. These problems usually occur when using Google Chrome, which is not compatible.



Your Windows Compatibility Settings (Default Browser) should be changed to either Internet Explorer or Firefox to properly read the HTML files and utilize the Search function.

You may still use Google Chrome to surf the internet, but when a program opens a browser window, it will use either Firefox or Internet Explorer as the default.



# From the Marketing Desk

As we make our way into the hot summer days of 2013, business will be picking up, offices will be busier, days become longer, and we all work harder!!!

I can imagine having the right software running your business during these hectic times can be reassuring, and comforting. I've been told "having the right software is one less thing we have to worry about."

Great, I'm glad your happy! But...think about your friends having the peace of mind of using the best contractor software in the industry. Do you know someone who could stand a little less stress this summer? Be the friend who introduces STRUCTURE to them, and their business. They will thank you, and the C/F Data Family will thank you as well.

Enjoy the warm weather; we will be shoveling before you know it!

## Look for us on these social media sites

New products, events, photos, and news are frequently posted. Be sure to connect with us for the latest happenings.



**Vic Moulton, Account Executive**

## Contact Us

Give us a call for more information about our services and products, including STRUCTURE, STRUCTURE-mobile, FieldLink, and additional modules such as Project Management, Work Orders, and Payroll.

**C/F Data Systems, LLC**  
220 Libbey Industrial Parkway  
Weymouth, MA 02189

(800) 370-0050

support@cfdatasystems.com

Visit us on the web at  
[www.cfdatasystems.com](http://www.cfdatasystems.com)

## JJI - Job Inquiry

Since the last User Group Meeting, I know many more of you have started to use JJI on a regular basis to analyze your jobs.

I want to note that in the documentation for the "Total Project Value", I did not make it clear that the figure includes 'Extras'.

So please make note that:

**Total Project Value does include Extras.**

P.S. If you are looking at JJI for the first time and want to talk about what you see here, give me or Support a call.

**Marilyn Kelland, Senior Software Consultant**



## Summer Vacations

It's that season again, when most folks in the office plan to take some well-deserved time off.

**Make sure someone is cross-trained to do your job while you are out having some fun.**

Payroll doesn't happen by itself. If you are not there to process it, it's not getting done. Be prepared to run it before you leave, or train a person to be your backup.

**Speaking of backups - BACKUP your data nightly!**

We have all been affected by heavy spring storms, and now that summer is here, we need to be prepared.

Please do a FULL backup of your D1 directory (these are your data files). You should keep one copy (perhaps Friday's) stored off site.

Should something happen to your building, you will have a backup not more than a week old. Hopefully you will never need to use it, but it's always good to be prepared.

Also note that **C/F Data Systems Forms** will be closed July 1 to July 8 for summer vacation.