

PROJECT MANAGEMENT GUIDE



Every day, you're busy trying to keep track of multiple jobs with different delivery dates. Rest easy, Ferguson is here to help with a new online tool to effectively manage your many multi-phase projects, simultaneously.

Introducing the Project Management tool from Ferguson — available for free on Ferguson.com. This tool is the extra set of hands you need to keep track of all the parts and pieces across all of your job sites and can be used for each project to keep you on-time and organized.

Ferguson Project Management Features:

- Keeps track of all the material associated with the chosen job
- Provides visibility to administer your project as it is happening for greater accuracy
- Tracks multiple projects and compares open orders, invoiced orders and account credits to the original source bid so you stay on-track and on-budget
- When reviewing budget versus spend details, this tool:
 - Distinguishes products that appear on the original bid from those items that have been purchased for the same project, but were not from the origin bid. These items may be quoted for this job, but they were just not in the Source Bid
 - Provides proof of delivery
 - Shares product details easily across your team

Try it today on Ferguson.com
Contact your Ferguson representative to get started! Now, let's look at how it works.

The screenshot shows the Ferguson Project Management interface. At the top, there is a search bar and navigation links for ACCOUNT and CART. Below the navigation, there are tabs for ALL PRODUCTS, SHOP BY INDUSTRY, FERGUSON PRO, and SHOP BY ROOM. The main content area is titled 'PROJECT MANAGEMENT' and displays the following information:

Company Name: HOOLI Job Name: MAN STREET IMPROVEMENTS
 Purchase Order: BIG JOB Project Manager: Jeff Walbert

A message states: "We are unable to show order details prior to June 13, 2017 at this time. Please contact your associate for details."

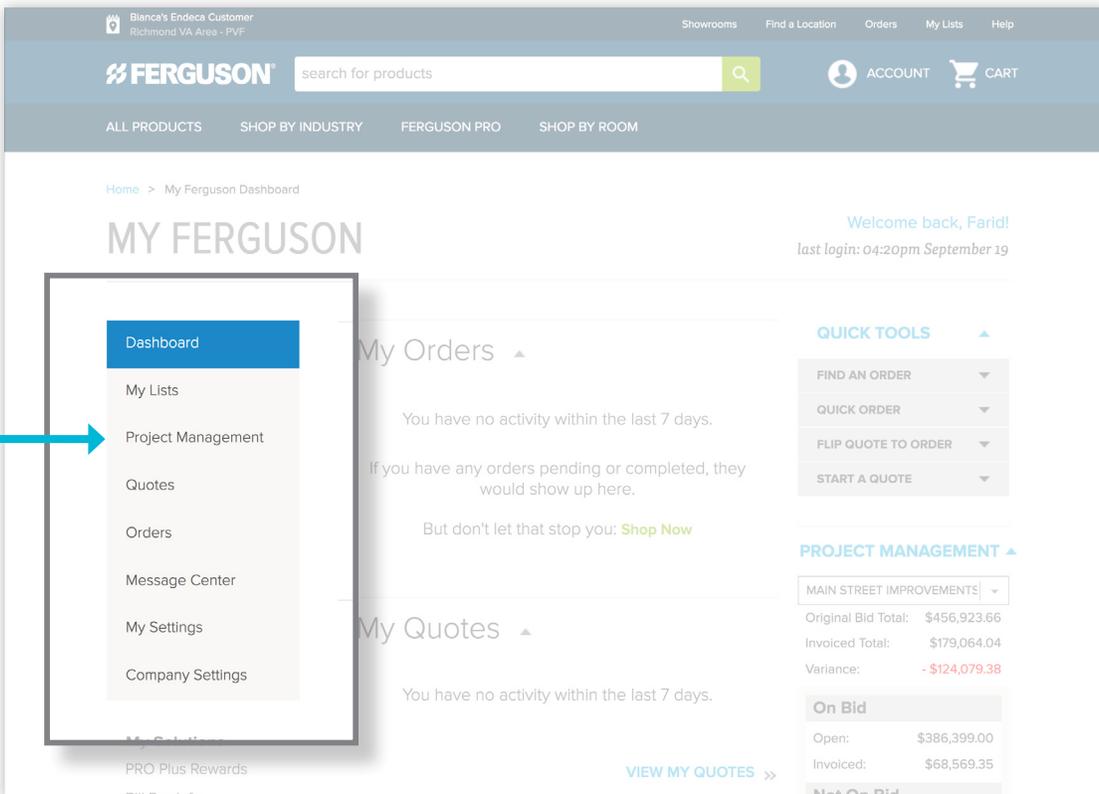
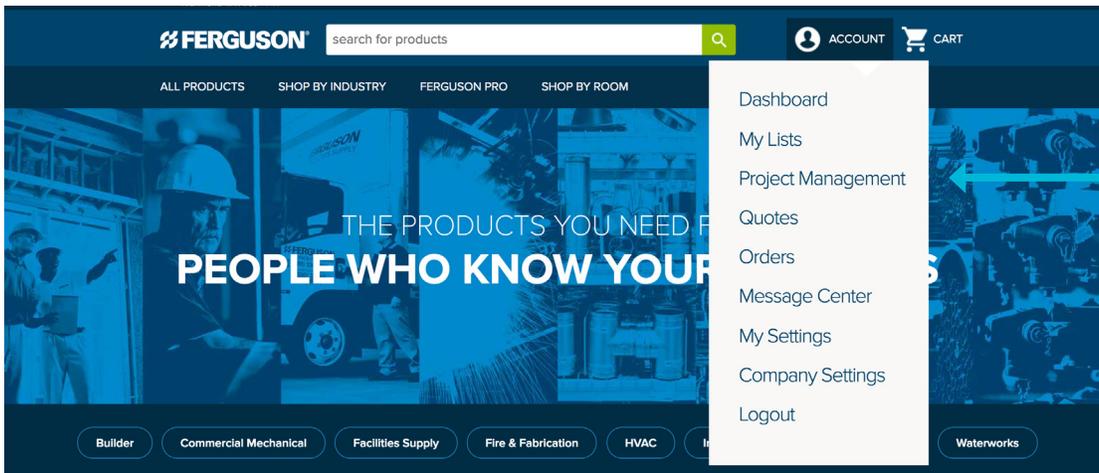
Summary of costs:

Open On Bid:	\$386,399.00	Invoiced On Bid:	\$68,569.35	Original Bid Total:	\$456,923.66
Open Not On Bid:	\$15,540.00	Invoiced Not On Bid:	\$110,494.69	Total Invoiced Amount:	\$179,064.04
				Variance:	-\$124,079.38

Below the summary, there are two tabs: 'Products On Bid' and 'Products Not On Bid'. The 'Products On Bid' tab is active, and the table is sorted by 'Original Bid Products'. The table has the following columns: PRODUCT ID / DESCRIPTION, UOM, BID, OPEN, INVOICE, CREDIT, and VARIANCE.

PRODUCT ID / DESCRIPTION	UOM	BID	OPEN	INVOICE	CREDIT	VARIANCE
DR18BPU 20 fl. x 6 in. DR 18		12,000	14,500	500		-3,000

After your sales associate turns on Project Management for you, the Project Management tool can be found in the drop-down menu under “Account” in the top right corner, or on your “Dashboard” to the left of the screen. The “Dashboard” view provides an overview of any selected job.



Project Detail Page

Viewing Job Details:

The screenshot shows the Ferguson Project Management interface. At the top, there is a navigation bar with the Ferguson logo, a search bar, and links for Account and Cart. Below this is a breadcrumb trail: Home > My Ferguson Dashboard > Project Management. The main heading is 'PROJECT MANAGEMENT'. Job details are displayed in a grid: Company Name: HOOLI, Job Name: MAIN STREET IMPROVEMENTS, Purchase Order: BIG JOB, and Project Manager: Jeff Walbert. A message box states: 'We are unable to show order details prior to June 13, 2017 at this time. Please contact your associate for details.' Below this is a summary table with the following data:

Open On Bid:	\$386,399.00	Invoiced On Bid:	\$68,569.35	Original Bid Total:	\$456,923.66
Open Not On Bid:	\$15,540.00	Invoiced Not On Bid:	\$110,494.69	Total Invoiced Amount:	\$179,064.04
				Variance:	-\$124,079.38

Below the table are tabs for 'Products On Bid' and 'Products Not On Bid', and a 'Sort by' dropdown menu set to 'Original Bid Products'. Three arrows point from the table rows to the explanatory text below.

Open on Bid

Displays the total open dollar amount on the original source bid.

Open Not On Bid

Displays the total open dollar amount NOT on the original source bid.

Invoiced On Bid

Displays the total dollar amount invoiced on the original source bid.

Invoiced Not On Bid

Displays the total dollar amount invoiced NOT on the original source bid.

Original Bid Total

Total dollar amount of the original source bid.

Total Invoiced Amount

Total dollar amount of both the items on the original source bid and any additional items purchased on this job account.

Variance

Displays the total dollar amount of the difference between what is invoiced and what was on the original source bid.

Company Name: HOOLI Job Name: MAIN STREET IMPROVEMENTS
 Purchase Order: BIG JOB Project Manager: Jeff Walbert

Open On Bid: \$386,399.00 Invoiced On Bid:
 Open Not On Bid: \$15,540.00 Invoiced Not On Bid:

Products On Bid | Products Not On Bid

PRODUCT ID / DESCRIPTION	UOM	BID	OPEN	INVOICE	CREDIT	VARIANCE
DR18BPU 20 ft. x 6 in. DR 18 Gasket PVC Pressure Pipe	FT	12,000 \$74,592.00	14,500 \$90,132.00	500 \$3,108.00	-	-3,000 -\$18,648.00
DR18BP12 20 ft. x 12 in. DR 18 Gasket PVC Pressure Pipe	FT	10,000 \$216,730.00	10,000 \$216,730.00	4,000 \$86,692.00	-	-4,000 -\$86,692.00

There are two tabs on the Project Management Details page, Products On Bid and Products Not On Bid.

Product ID/ Description

Description of the product ordered. Tip – You can hover over this field to view the entire description.

UOM

Unit of measure. Example: each, foot, inch, etc.

Bid

The total quantity quoted on the original bid. The total dollar amount of the quoted item is also displayed under the total quantity quoted.

Open

Displays the total open quantity and total open dollar amount.

Invoice

Displays the total quantity of items invoiced and the total dollar amount invoiced.

Credit

Displays the total quantity of items credited and the total dollar amount credited.

Variance

Displays the difference between *Quantity* on the original bid and what is *Open* and Invoiced, minus the *Credited* quantity:
 $V = B - (O + I - C)$

* A date is provided at the top of the Project Management Details page and will indicate how far back you can view historical data. The numbers displayed on the page do not include information prior to the specified date.

Products On Bid | Products Not On Bid

Sort by: Original Bid Products

PRODUCT ID / DESCRIPTION	UOM	BID	OPEN	INVOICE	CREDIT	VARIANCE									
DR18BPU 20 ft. x 6 in. DR 18 Gasket PVC Pressure Pipe	FT	12,000 \$74,592.00	14,500 \$90,132.00	500 \$3,108.00	-	- 3,000 - \$18,648.00	Details								
 <p>DR18BPU 20 ft. x 6 in. DR 18 Gasket PVC Pressure Pipe</p> <p>View Product Detail</p> <p>View Original Source Bid</p>															
<p>Open Orders Invoiced Orders Credit Orders</p> <table border="1"> <thead> <tr> <th>ORDER# ↑↓</th> <th>DATE ↑↓</th> <th>QTY ↑↓</th> <th>MY PO# ↑↓</th> </tr> </thead> <tbody> <tr> <td>2393257</td> <td>06/20/2018</td> <td>500</td> <td>BIG JOB</td> </tr> </tbody> </table>								ORDER# ↑↓	DATE ↑↓	QTY ↑↓	MY PO# ↑↓	2393257	06/20/2018	500	BIG JOB
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2393257	06/20/2018	500	BIG JOB												
DR18BP12 20 ft. x 12 in. DR 18 Gasket PVC Pressure Pipe	FT	10,000 \$216,730.00	10,000 \$216,730.00	4,000 \$86,692.00	-	- 4,000 - \$86,692.00	Details								
DR18BPX 20 ft. x 8 in. DR 18 Gasket PVC Pressure Pipe	FT	3,000 \$30,675.00	3,000 \$30,675.00	-	-	-	Details								

When you click DETAILS, you can view the following:

View Product Details:

Click to go directly to the selected item's detail page where you can view pricing, buying options, description, the last date the item was purchased, and any other documentation (specification, installation, warranty, etc.) available.

View Original Source Bid:

Click to view the original source bid.

Open Orders tab: Displays the open orders, date ordered, quantity of items still open and the PO number for the order.

Invoiced Orders tab: Displays the invoiced order number, date invoiced, quantity of items invoiced and the PO number for the order.

Credit Orders tab: Displays credits that were issued for the selected item, date issued, quantity of items credited and the PO number for the order.

Home > My Ferguson Dashboard > Project Management

PROJECT MANAGEMENT

Company Name: HOOLI Job Name: MAIN STREET IMPROVEMENTS
 Purchase Order: BIG JOB Project Manager: Jeff Walbert

We are unable to show order details prior to June 13, 2017 at this time. Please contact your associate for details.

Open On Bid:	\$386,399.00	Invoiced On Bid:	\$68,569.35	Original Bid Total:	\$456,923.66
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Products On Bid Products Not On Bid

PRODUCT ID / DESCRIPTION	UOM	BID	OPEN	INVOICE	CREDIT	VARIANCE	
DR18BPU 20 ft. x 6 in. DR 18 Gasket PVC Pressure Pipe	FT	12,000 \$74,592.00	14,500 \$90,132.00	500 \$3,108.00	-	- 3,000 -\$18,648.00	Details

Products On Bid

The Products On Bid tab displays products and quantities that are on the original source bid. The items are displayed in the same order they were entered on the bid. If an item appears multiple times, the item is rolled into one line-item on the bid.

Home > My Ferguson Dashboard > Project Management

PROJECT MANAGEMENT

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Products On Bid **Products Not On Bid**

PRODUCT ID / DESCRIPTION	UOM	BID	OPEN	INVOICE	CREDIT	VARIANCE	
RAP1851 RAPTOR® No-Hub Torque Wrench 5/16 in. 80#	EA	-	-	20 \$872.20	-	- 20 -\$872.20	Details

Products Not On Bid

The Products Not On Bid tab displays product and quantities for the job account that were not on the original source bid. If an item was ordered or invoiced on the job account multiple times, the quantity will be combined into one line-item on the page.

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