

White Paper and Overview on Proposed Software Solution for Lancer Contracting

Section 1. Introduction

This purpose of this white paper is to determine that the following software package can and will meet the needs of Lancer Contracting's Online Contact Management and Workflow Integration System project as proposed by VelocityDomain Network Solutions. This document will be broken down into the following sections:

1. Introduction
2. Brief overview of proposed commercial software
3. Description of how software will work in conjunction with the above stated system
4. Compliance with previously established guidelines and need requirements for the above stated system
5. Conclusion

Section 2. Brief Overview

The proposed commercial software under consideration is a tri-fold package of tightly integrated applications that provide a robust accounting and project management system to meet the objectives of the above stated project. These include:

- QuickBooks Enterprise Solutions Business Management Software by Intuit, Inc.
- Corecon Application Suite 3.0 by Corcon Technologies, Inc.
- Microsoft SQL Server, by Microsoft Corporation

QuickBooks Enterprise Solutions Business Management Software (QBE for short) is the core application dedicated to the accounting aspect of the project. QBE offers more robust functionality than its predecessor QuickBooks Premiere. QBE provides the multiple layers of security when being accessed by concurrent users and is large enough to cover all accounting aspects and contact management required by Lancer's operations. The following is a detailed list of QBE's features taken from Intuit's own marketing documentation:

QuickBooks® Enterprise Solutions is Right for Your Growing Business!

In addition to the features exclusive to QuickBooks Enterprise Solutions, you'll receive everything offered in QuickBooks Pro and Premier 2002.

10 simultaneous users to support your growth
Improved simultaneous user performance
Add twice as many customers, products, and vendors
Faster generation of standard Balance Sheet Reports
Track more employee information with the QuickBooks Employee Organizer
Track sales orders and back orders
Assign classes to all expenses
Combine reports from multiple company files with one step
QuickBooks Deluxe Payroll Service—first 6 months of service fees FREE!
QuickBooks Credit Check Services—4 months of Gold level service FREE!
 Integration with more business software, including Microsoft Word, Excel, Outlook, and ACT!
 Remote Access
 Password-protected Close Date and Closing Date Exception Report
 More Journal Entry Options
 Improved Reconciliation Reporting
 Expert Analysis and Business Optimization tool
 Import, export, and share customized report templates
 Search for specific transactions with easier Find feature
 Apply one customer payment to multiple jobs
 Customize and email all invoices, estimates, and statements
 Improved report customization
 Easily create multiple and duplicate estimates per job
 "Paid" stamp on invoices and bills
 Easier sales tax tracking
 Custom price levels (wholesale, preferred customers, etc.)
 Faster bill payment with Online Billing
 Download credit card statements

Corecon Application Suite 3.0 is a tailor-made product that takes full advantage of QBE and Microsoft SQL Server's cost management and data basing capabilities specifically in the construction/contracting industry. Corecon is a form-driven application that looks and feels similar to Microsoft Access and seamlessly integrates with Microsoft Office Professional. With the Corecon client application installed on the remote laptops, and all of the data housed on the in-house server in a MS SQL Sever database any field service personnel will be able to input all relevant job costing and project status information remotely.

There is a seamless import and export of contact and project management information between the applications; however the level of security can be set to any specifics determined by Lancer's management staff.

The following is a detailed list of Corecon's features taken from Corecon's own marketing documentation:

CORECON APPLICATION SUITE 3.0

SUMMARY OF FEATURES & TECHNICAL REQUIREMENTS

CONTACT MANAGEMENT

- Company Profile
- Contact Profile
- Journal Entries
- Project Email Distribution Lists
- Integrates with Microsoft Outlook

PROJECT INFORMATION

- Project Lead Tracking
- Project Information Tracking
- Project Directory

COST DATABASES

- CSI Codes
- Labor and Equipment Resources
- Crews
- Material Items
- Formulas
- Work Items
- Dynamic Work Assemblies
- Compatible with RS Means Databases

COST ESTIMATING

- Takeoff with Work Breakdown Structures
- Takeoff Adjustments
- City Cost Adjustments
- Digitzer Solutions
- Import Previous Estimates
- Integrates with Microsoft Project

BID PACKAGES

- Email Invitation to Bid
- Base Bid and Alternates
- Bid Proposals
- Manage Multiple Subcontractors' Bids

CONTRACT ADMINISTRATION

- Multiple Prime Contracts and Subcontracts
- Change Proposal Request (CPR)
- Prime Contract Change Orders (CO)
- Subcontract Change Orders (SCO)

DOCUMENT CONTROL

- Drawing Management
- Linked Documents and Photographs
- Issues
- Meeting Minutes
- Owner Furnished Equipment
- Request for Information (RFI)
- Superintendent's Daily Log
- Major Material Items
- Submittals
- Transmittals
- Field Work Authorization (FWA)
- Schedule Tracking with Microsoft Project
- Project Alerts

QUALITY CONTROL

- Permits
- Comply Notices
- Test/Inspection Plan
- Punchlist

SAFETY

- Safety Meetings
- Safety Accidents

JOB COST CONTROL

- Job Cost Codes
- Purchase Orders/PO Invoicing
- Miscellaneous Expenses
- Timecards
- Subcontract Invoicing
- Prime Contract Application for Payment
- Budget Tracking

REPORTS

- Over 140 Corecon 3.0 Reports
- Save any Corecon 3.0 Report as an Adobe PDF
- Customize Reports with Microsoft Word Templates

OPTIONAL SOFTWARE

- Microsoft Outlook
- Microsoft Word
- Microsoft Project
- Microsoft Exchange Server
- Tally Systems QuickMeasure

TECHNICAL REQUIREMENTS

- IBM-compatible(300 MHz or higher)
- Minimum 64 Mb RAM or higher
- Windows® 98/Me or Windows NT® 4.0 (SP5)/2000/XP
- Microsoft® SQL Server 7.0® or 2000 is required for more than five users.
- Microsoft Office 2000/XP Pro or Premium

Section 3. System Overview

As stated previously, the preceding applications will sit across the company LAN as follows:

On-site Windows 2000 Server:

QuickBooks Enterprise Solutions (10 Client Access Licenses)

Microsoft SQL Server 2000 (10 Client Access Licenses)

On-site Windows 2000/XP Professional Workstations:

QuickBooks Enterprise Application

Corecon Application Suite 3.0

Corecon Link Software

Microsoft Office Professional for Windows 2000/XP

Remote Access Laptops Running Windows XP Professional:

Corecon Application Suite 3.0

Corecon Link Software

Microsoft Office Professional for Windows 2000/XP

Dedicated VPN software

A typical scenario would consist of a field service person using the laptop equipped with a cellular modem dialing into the company ISP (NetworkPlus) and establishing a VPN tunnel (via a Cisco 3000 Series VPN Concentrator box) with the internal network.

The field service person would then be able to launch Corecon (loaded on their laptop) and begin to transfer job-related data to and from the internal network.

Internally at Lancer, Lancer management would then be able to access the Corecon database and utilize QuickBooks accounting capability to manage all financial aspects of the reported on-site work.

Finally, a redesign of the company web site will allow potential clients on the Internet to input "bid request" information that would be seamlessly imported to the SQL database to be integrated with the contact management system.

Section 4. Compliance with Lancer Guidelines

Lancer Guidelines	Corecon 3.0	QuickBooks Ent.	MS SQL Server
Contact Management	Yes	Yes	Related
Scheduling (sales/field personnel)	Yes	N/A	Related
Accounting	N/A	Yes	N/A
Task Building	Yes	N/A	Related
Estimating	Yes	N/A	Related
Quoting	Yes	Yes	Related
Job Costing	Yes	Yes	Related
Track Leads	Yes	N/A	Related
Report Manager	Yes	Yes	Related
Remote Access	Related	Web-enabled	Related
Customer History	Yes	Yes	Related
Full Flowing through all stages	Yes	Yes	Related

Section 5. Conclusion

As you can see from the previously stated features and point for point guideline fulfillments, the strategy outlined here can achieve the objectives set forth by Lancer Contracting.

Furthermore, VelocityDomain has established relationships with Intuit and Corecon (WendWare) that will facilitate any application customizing and training needs for Lancer personnel.

Should this white paper address the concerns of the Lancer management, a final meeting (between VelocityDomain and Lancer Contracting) and final proposal should be forthcoming at the behest of Lancer Contracting.

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