Proposals

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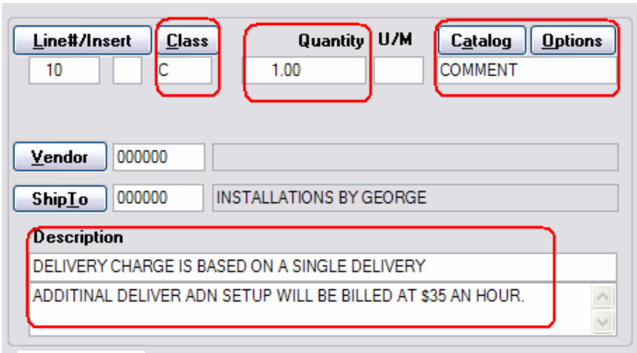
Adding a Comment Line to a Proposal

One way of adding information to a proposal is comment lines. Comment lines are just text that will print in the detail area of a proposal. Examples of comment lines may me messages to the customer such as "DELIVERY CHARGE BASED UPON SINGLE DELIVERY".

From within the proposal detail, click the icon or go to Edit | Add to create a new line item.



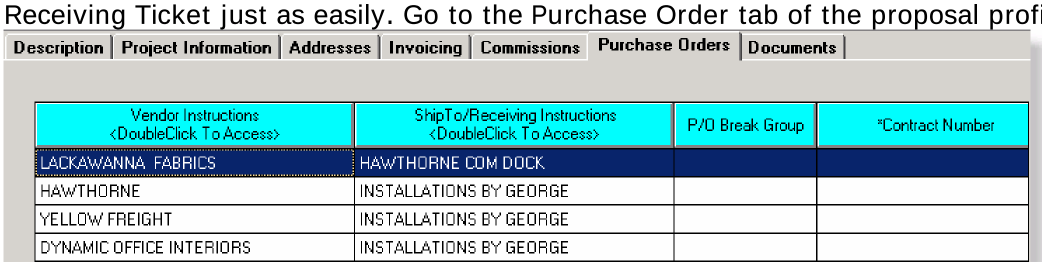
- Make sure the **Class** is set to "**C"** this is how TeamDesign® will know to treat this line as a comment.
- We always recommend that you use a non zero quantity so use a "1" in the quantity field. The quantity will not print on a comment line.
- Like the Quantity we always recommend there be a value in the **Catalog** field. You could use "COMMENT" or "CMT" to designate a comment line. This value will not print on the proposal.
- In the **Description** field is where you will type the comment. Remember that you can use a "**^"** to force a line break.

Adding Comments to Other Documents

You can use comment lines to print text on the other documents that originate with the proposal, the purchase order, invoice, and delivery ticket, as well. You can use the document presence to add comments to other documents that originate from the proposal as well.

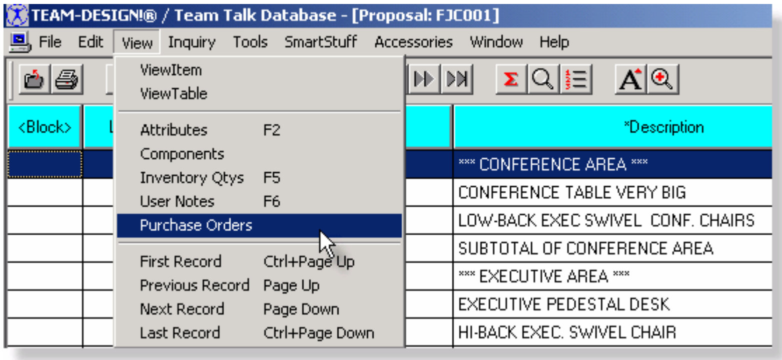
Printing comments to the Purchase Order through the Proposal Profile

You can to enter comments that will appear on a purchase order without adding a comment line directly to the proposal. Also, you can have the comments print on the Receiving Ticket just as easily. Go to the Purchase Order tab of the proposal profile.



Vendor Instructions <DoubleClick To Access>	ShipTo/Receiving Instructions <DoubleClick To Access>	P/O Break Group	*Contract Number
LACKAWANNA FABRICS	HAWTHORNE COM DOCK		
HAWTHORNE	INSTALLATIONS BY GEORGE		
YELLOW FREIGHT	INSTALLATIONS BY GEORGE		
DYNAMIC OFFICE INTERIORS	INSTALLATIONS BY GEORGE		

This tab includes a listing of columns for Vendor Instructions, Ship to/Receiving Instructions, P/O Break group, Contact #, and a requested ship date for all purchase orders that will be created for this proposal. Initially, this tab is blank. To populate and use this tab, first go into the proposal detail and click on *View* and choose *Purchase Orders*.



You should now see a blank Summary screen. Click Okay. The Summary screen will now show the purchase orders for the proposal, and the status (a purchase order# if ordered, or a message that this purchase order has not yet been ordered).

Note:
This procedure is the ONLY way to populate the Purchase Order tab of the proposal profile.

Once the Purchase Order tab of the proposal has been populated, you can access the columns (except for the Purchase Order Break group) in order to edit or add entries. This would include entering comments into the Vendor Instructions column for printing on the purchase order, as well as entering notes in the ShipTo/Receiving Instructions to print on the Receiving ticket. As an added feature, you can change the requested delivery date from what was originally entered in the Proposal Profile under the Project Information tab or enter a contract number here that will print on the purchase order.

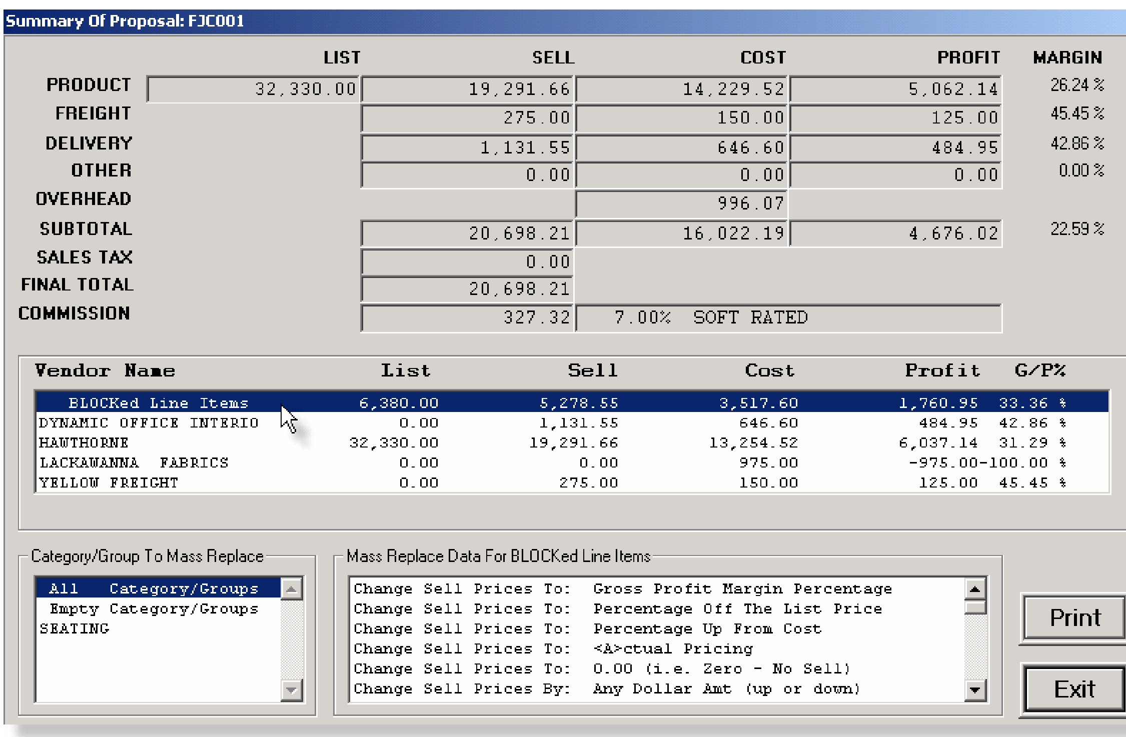
Adding commonly used comments to your inventory:

Comment lines that are commonly used for a variety of documents by your company can be added as “inventory” items for easy retrieval to a proposal. You would also be able to select the default document presence for these standardized comments in the profile of the “inventory” item. You would add the comment line item to inventory just as you would any other true inventory item.

When adding the item, choose a vendor that most commonly reflects the usage of the comment item. You would need to enter a title for the comment item such as “freight comment” in the *Catalog Item Number* field*,* then use the *Brief Description* and extended field to add the actual text that you would want to appear on the proposal or other documents. On the *Selling/Rentals/Proposals* tab of the inventory item profile, you would choose “C” as the default Item Classification, as well as choose the document presence most commonly used for this Comment item.

Mass Update Unordered Proposal line items

A wide variety of mass update procedures can be performed on un-ordered line items by vendor, catalogue line, manufacturer category, or by blocked lines. From the proposal detail, choose Tools | Summary or click the summary icon Σ. The Summary Screen provides vital details on List, Cost, Sell, and Profit by item classification as well as by vendor.



From the center section, choose a vendor or “Blocked Lines”. Next, choose which catalogue or category you wish to change or choose “All” or “Empty”. The catalog selection would include any SIF catalog codes as well as any manually entered manufacturer category code. Then choose the function you wish to perform. A selection of several time saving options to mass update the proposal data is listed below.

Change line item status: You might encounter a customer that wishes to see different selections for the same job. Perhaps there are a variety of different furniture options they are considering from different vendors. You could choose to do each as a separate proposal, but that would require additional data entry and can inflate reports such as the projected bookings. Instead, you can simply add all line items to one proposal and then use mass update to change the line item status to provide different printed versions of the same proposal. You would change all line items by vendor or blocked lines to an "Inactive" status except for the lines that you wish to print on the current version of the proposal. This enables the Proposal to print multiple versions simply by changing the status of line items from "Active" to "Inactive" as needed. After your customer has chosen which version of the proposal they prefer, you can then easily change the status of the unwanted lines to "Erase/Delete" to permanently remove the items from the proposal.

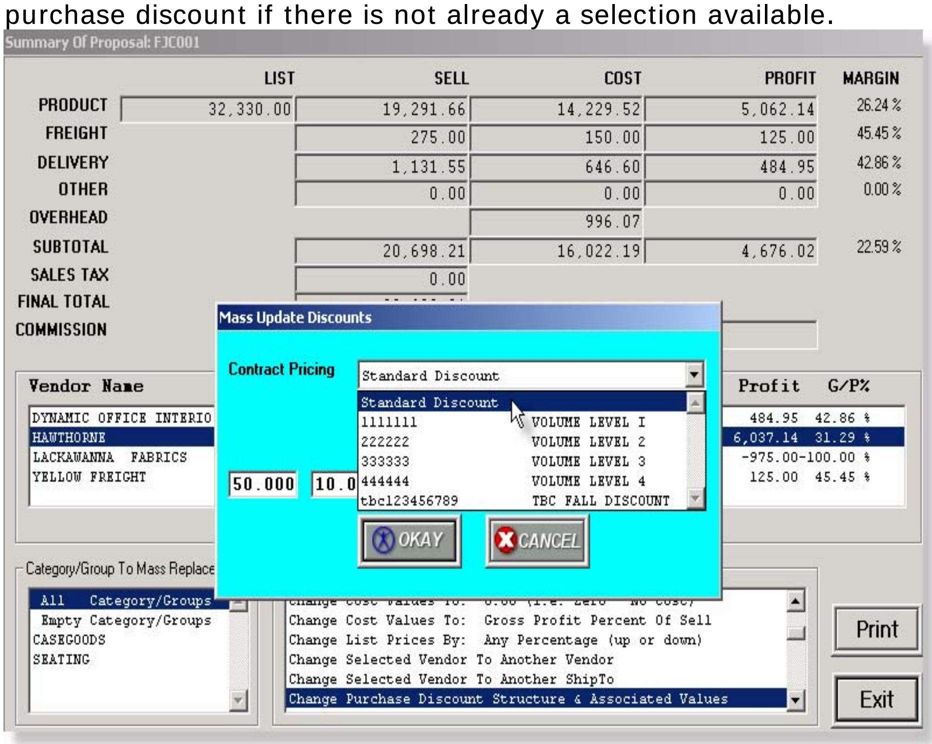
Change Vendor/Ship to: You can easily change the vendor or ship to selection for a group of line items. You will be able to choose the line items by their current vendor or use the blocked line function. You might need to do this to order a product from a different vendor, change the install company on a series of D&I lines, or change the ship to number for all product lines on a proposal from the default "000000" address to an actual ship to address number for electronic order processing. You will also have the option to adopt the revenue code and discount structure of the new vendor.

Change Revenue Codes: When changing the vendor of a group of line items, the revenue code for that line item will change also if the vendor's profile contains a revenue code and you have chosen to replace when mass updating the vendor. However, if you do not use the default revenue codes from the vendor's profile, you can easily change the revenue code for multiple lines on a proposal by mass updating. An example may be if you change from an external vendor for D&I services to an internal vendor. You would want to change to a Revenue Code that does not affect the WIP/CGS accounts to one that affects the clearing account.

Change Sell Pricing Style: You might receive notice from a vendor regarding a change in the discount structure of a particular line of products. If you have already presented a proposal to your customer but have not yet ordered the product, you would need to lock in the sell prices of the affected lines prior to changing the purchase discounts as changing the purchase discount could change the sell price on the proposal. You can change the pricing style of detail line items on a proposal from their current style (L, C, or G) to an Actual pricing style, thereby locking in the sell price regardless of any change in list price or cost. You can also use this to change the pricing style to a particular Gross Margin, or mark-up from Cost, or discount from List to reflect any new pricing needs.

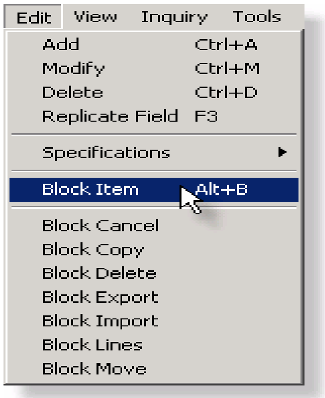
Change Purchase Discount: In each customer's profile (**Customers | Maintenance | highlight Customer | click Modify Record icon | choose Special Prices tab**), you can enter a series of actual vendor discount contracts, as well as purchase discounts based upon purchase volume for that vendor/customer combination.

Once the contracts have been entered into the Special Prices tab of the customer's profile, they would be available to be assigned to items through mass updating. You would be able to see the cost and sell value for each vendor of the proposal to determine what level of discount to apply. You would also be able to enter the purchase discount if there is not already a selection available.



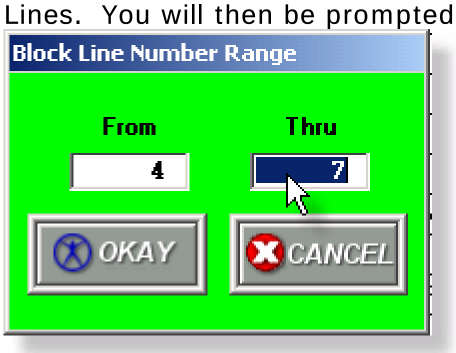
Blocking

The Block function is a very useful feature used to Block Copy line items, Block Move line items, Block Delete multiple line items, and Block Import or Export line items in the detail of a proposal. All Block functions require that the appropriate lines be Blocked prior to the start of the procedure. There are a variety of ways to block line items in the proposal detail. Use the following screenshot as a reference for the usage of the various Block functions.



From the Proposal Detail, double-click in the Block column of a line item record. The word “Block” will appear in the column. Repeat this for all records to be copied, moved, deleted, etc.

The "Block Lines" option allows you to designate a group of detail items with “Block” so that you do not have to flag each line individually. Click on Edit and choose Block Lines. You will then be prompted to enter the range of line numbers to be blocked.



Enter the line number for which you want to start the block in the "From" field and the line number for which you want to end the block in the "Thru" field. Click the Okay button. Confirm the message to Block Line Number Range by answering yes.

Another way to "Block" a line item is to go to edit and choose block item, or simply hit alt-B.   After using any of the blocking methods to block the line items, you are ready to perform the Block function.

A description of each function follows:

Block Copy: allows you to copy the entire detail item(s) to another location within the proposal Detail List.

Block Move: allows you to move selected detail records within the Detail List. This is useful for moving COM fabric records to the bottom of the proposal so they do not create "holes" in the item numbers.

Note:
Each of these functions will place the moved or copied line(s) to a new position directly beneath the line highlighted at the beginning of the Block copy/move procedure.

Block Delete: deletes all detail items that are marked "Block".

WARNING:
once removed, there is NO "undo" or "back-up" button!

Block Import: allows for the import of line items from other TeamDesign® proposals.

Block Export: allows for the export of line items to other TeamDesign® proposals.

"Blocked Item" is also useful in mass updating as previously discussed.

Note:
Always remember to "Renumber" when changing Proposal Detail Line items, to give FODS and comment lines the proper item numbers by going to **Tools | Renumber.**

The use of Group | Total Item Classifications in a Proposal

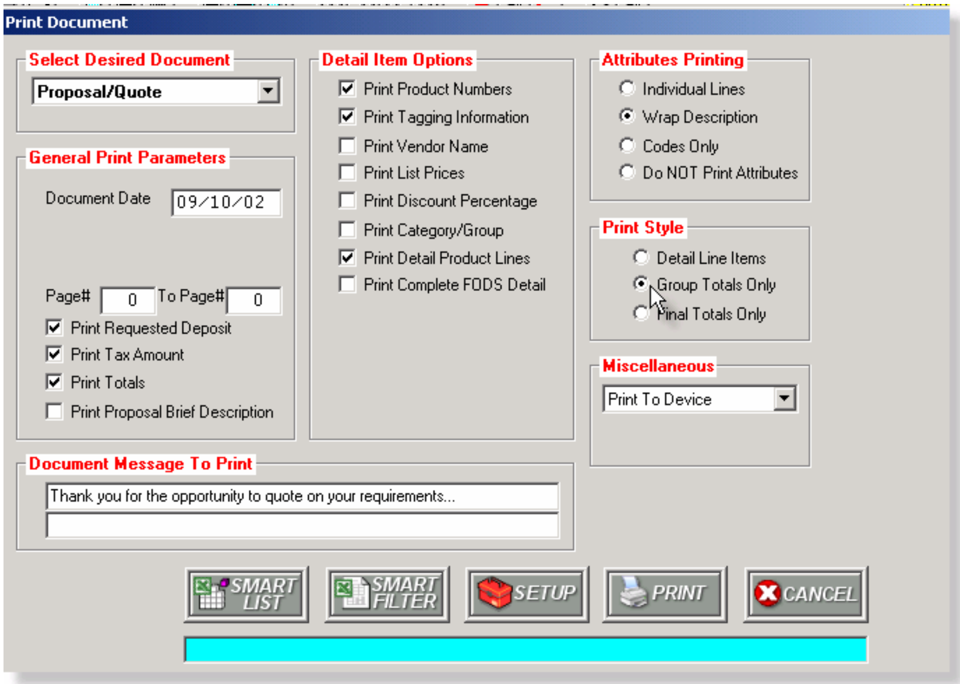
Through the use of special Line Item class codes, you can create groups and print sub-totals within a proposal. A <G>roup line item class code designates this is the start of a sub-set. A <T>otal line item class code designates the end of the sub-set. Anytime that you use a <G>roup line item, you MUST also have a <T>otal line item. <G>roup and <T>otal line items only print on the Customer Proposal and Acknowledgement. All other documents and reports ignore these line items.

How to add Group/Total lines:

The line items would be created in the same manner as any other proposal line item. The correct classification needs to be chosen for each Group line (G) and each Total line (T). The Brief Description field in the line item entry screen should reflect the text you want to appear on the Proposal. Example: "The Following Items are for Conference Room A". After the <G> and <T> lines have been created, use "Block Move" to place the <G>roup lines at the beginning of the sub-set and the <T>otal line at the end of the sub-set.

How to print the Proposal with just total lines*:*

When printing a proposal thru the standard method, the default is to print all Detail Line Items. As the following screen shot illustrates, you also have the option to print "Group Totals Only" when printing a proposal that you have entered Group and Total lines.



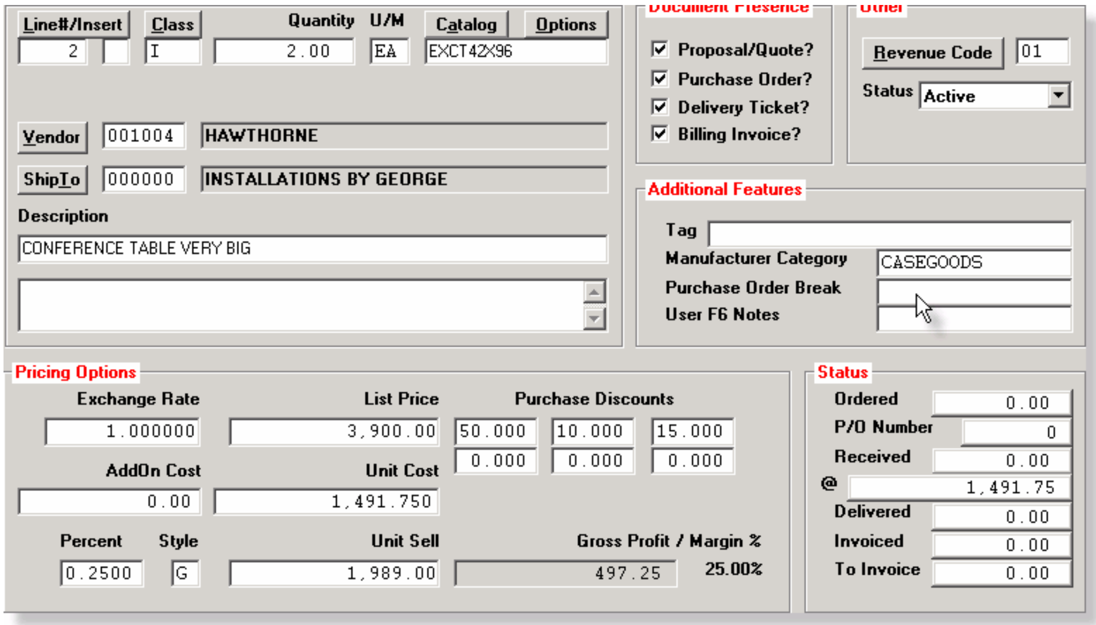
Purchase Order Break Groups

The system creates Purchase Orders first based on Vendor number, then Ship To number and lastly Purchase Order Break Groups if used. All items on a proposal that share the same vendor and ship to will be printed on the same purchase order. If you require line items with the same vendor and the same ship to number to be on a separate Purchase Order, you will need to use Purchase Order Breaks in the proposal line item entry.

When do I need to use P/O Break Groups?

Reasons you might need to use Purchase Order Breaks are numerous. Your vendor might require all quick ship items be on a separate purchase order. You might also have a need for product to be delivered in phases, such as for multiple floors of a building that will be completed and need to be furnished at separate time intervals. In each situation, you would have line items with the same vendor and ship to address. TeamDesign® would place these on the same purchase order unless Purchase Order breaks are used.

Adding detail information to the Purchase Order Break field allows you to create separate Purchase Orders for an item or items, if the question "*Use Purchase Order Breaks"* is "Y" in the proposal profile. The Purchase Order Break field is available on each line item of the data entry screen in Proposal Detail. The following screenshot will guide you to the propoer location to enter your Purchase Order break data.



WARNING!
All data entered into the Purchase Order Break field must be entered exactly the same for items that you wish to be on the same purchase order. Changes in spelling, abbreviations, spacing, capitalization, punctuation, etc. will all cause TeamDesign® to create separate purchase orders for items that you may have intended to be together.

Use of SIF Files in creating or editing Proposals

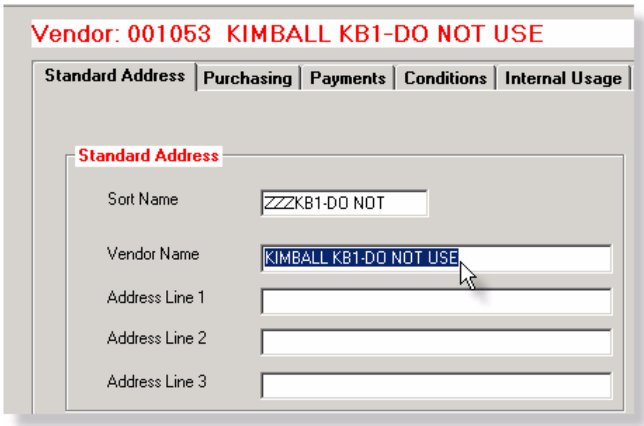
Creating SIF Vendor Masters

In order to import SIF files into a TeamDesign® proposal, you would first set up a main Vendor Profile, as well as a SIF Vendor Profile for each manufacturer's catalogue that you represent that can be specified.

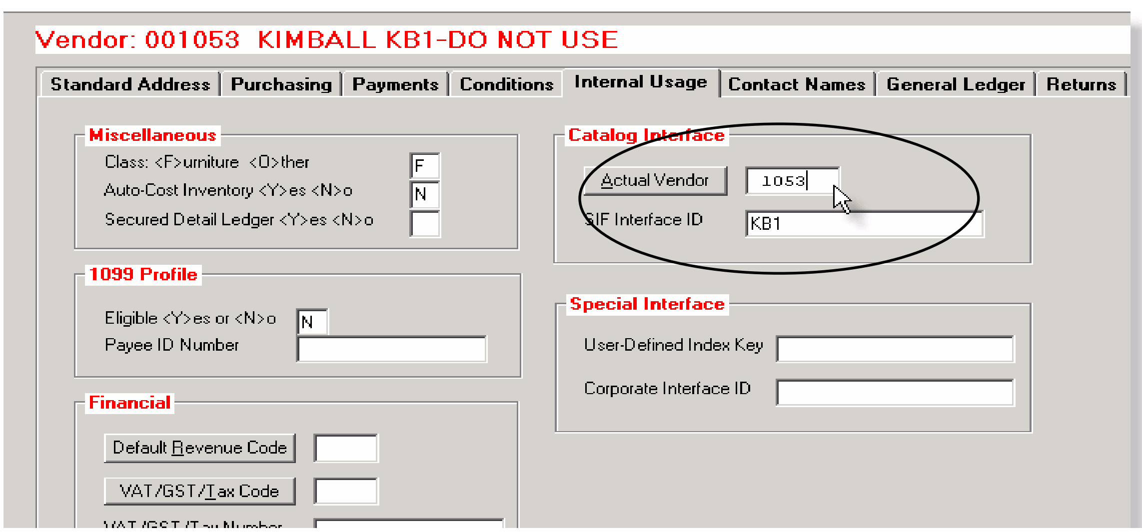
From the TeamDesign® main menu, choose **Vendors | Maintenance**. The vendor listing will appear. At this time, you can enter a new vendor by clicking on the Add icon or click on Edit | Add from the tool bar. The system automatically assigns the next available vendor number. You may also enter up to any six digits you require, as long as the number does not duplicate an existing vendor number. Accept the system assigned number or enter a new vendor number and click <Okay>. The "Vendor Profile" window opens defaulted to the Standard Address tab. For this discussion, we will address the Internal Usage tab. For this Main Vendor, the Catalog Interface on the Internal Usage Tab will be left blank.

After the Main Vendor is created, you will need to create a SIF Vendor for every catalog or product line that you use in your specifier. The SIF vendor points back to the Main Vendor. To create a SIF vendor, go to **Vendors | Maintenance** and click the Add icon as if you are creating a new vendor. When the profile appears, it is necessary to complete only five elements in the SIF vendor's profile.

In the *Vendor Name* field on the Standard Address tab, type the vendor's name, the three-digit catalog code or product line this vendor is for, and the words "do not use". In the Sort Name field, place three Z's as illustrated. This is to ensure this Vendor is NOT selected when manually creating a proposal. This vendor is only used for importing SIF files. It is recommended, but not required, to put the Standard Purchase Discounts in the Purchasing tab. If you default the discount structure in this tab, then this discount structure will be used when the cost or discount structure is not in the SIF file.



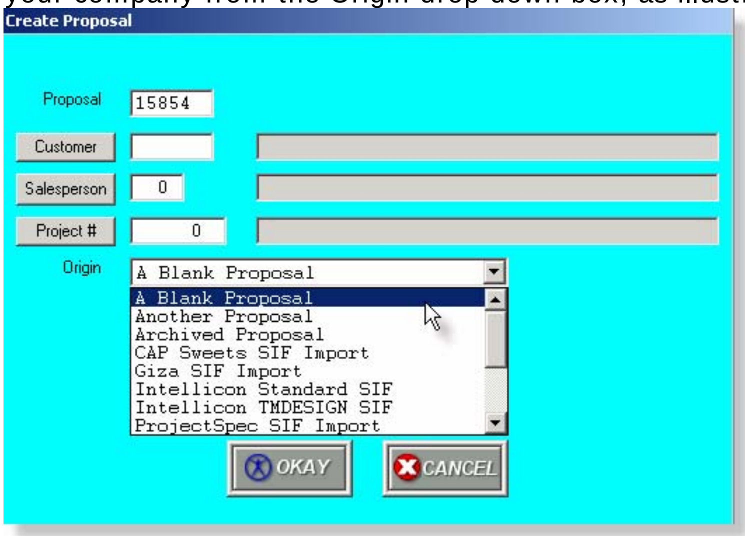
The next two fields that need to be completed for the *SIF vendor* are the most important. Click on the Internal Usage tab, as illustrated. The "Catalog Interface" stores the fields that link the importing of SIF files from the specifier. The *SIF Interface ID* is the three-digit catalog code or product line for which this vendor was created. The *Actual Vendor* needs to point back to the *Main Vendor* that you created earlier. Place the *Main Vendor* number in this field or click the <Actual Vendor> button and browse to select the vendor number.



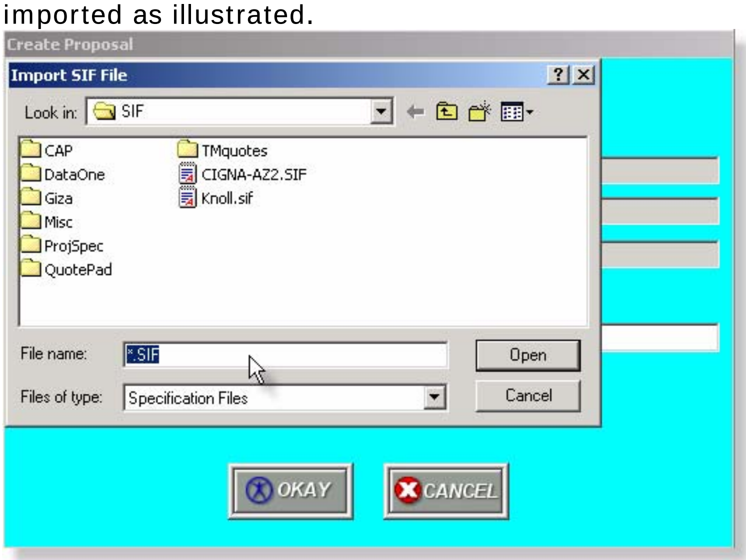
The last field to complete for the SIF vendor is the *Default Revenue Code* field. All remaining fields in the vendor profile may be left blank.

Importing a SIF at proposal creation

When first creating a proposal in *TEAM-DESIGN!*, select the SIF file type used by your company from the Origin drop down box, as illustrated.



Once you select the SIF file type**,** click on the <**Import File**> button to select the desired SIF file to be imported. Once you click the <**Import File**> button, a browser screen should appear that allows you to search for the SIF file to be imported as illustrated.



Once the SIF file is highlighted, click the <**Open**> button, which returns you to the "Create Proposal" screen. The file selected is now displayed. Click the <**Okay**> button to import the SIF file into the proposal. You will then be taken to the 'Proposal Profile', which should be completed as normal.

Importing multiple SIF files into proposal

Once a proposal has been created, you can still add additional SIF files to the proposal. To do so, simply access the proposal detail. Then click on **Tools | Import | External SIF file**. This will launch a browser similar to the one above enabling you to search for the correct SIF file to import into the proposal.

Other Tools

Sorting

Direct Billing

Installation Problems