



Projects

A Project is simply an easy way of working with a collection of jobs that belong together.

You will find the Project Name field on SPEX 1, to the right of the Job Title.

Project	Name	Unite
Work Type		
	Commercial	

Only you will see this Project Name- it does not appear on Proposals or other documents.

It is used simply to bring any number of jobs together into a Found Set to work with.

Suppose you want to quote 4 jobs that will all be awarded together, but each will have different specifications and pricing, and each will have its own estimate.

Project	Name	Unite
	heidel2017	

Or suppose you have to quote the same job 4 different ways, such as options for page count, or paper, or ink colors. Either way, think up a unique name, and enter it in the first job. When you clone a job, the Project Name will be carried into the copy.

Project	Memos	Contact	To Do
[heidel2017]			
Heidelberg Web Press Brochure 2017			
Heidelberg Presentation Folder 2017			
Heidelberg Service Brochure 2017			
Heidelberg Sheetfed Brochure 2017			

As jobs are created, they will appear in the Project Portal, on the right side of the screen.

Click on the job titles to navigate between the jobs in the project.

This also has the effect of isolating these jobs into a Found Set.

Go To	= 1 / 4 =	<<	<	>	>>	Organize
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(I am on job 1 of 4 found)

Message

RFE just this One job, or all 4 jobs in the Found Set?

Cancel Found One

So you can batch process your output- RFE, Proposals etc.

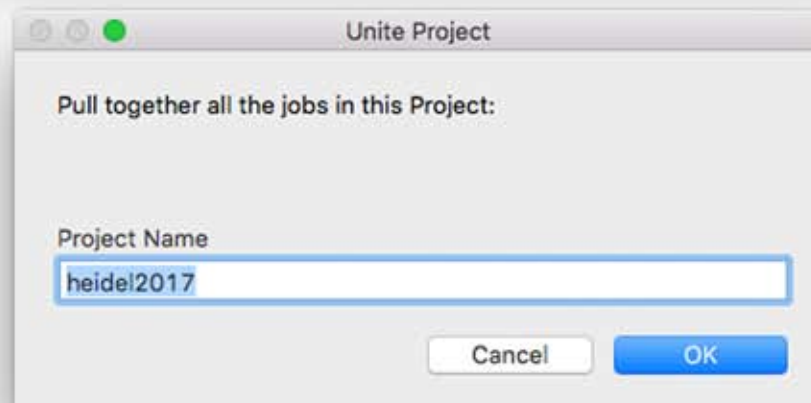
You can also create a Project from some existing jobs quite easily. Just perform a FIND that obtains the correct set of records, and then name one of those jobs with a Project Name, and click the Name link.



Project	<u>Name</u>	<u>Unite</u>
	heidel2017	



Click Unite and it will find all the jobs in your project...

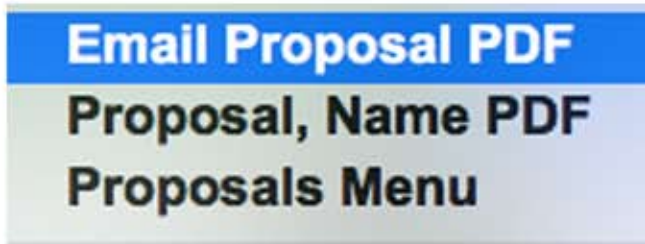


... just as clicking on any job title listed in the Project Portal will.

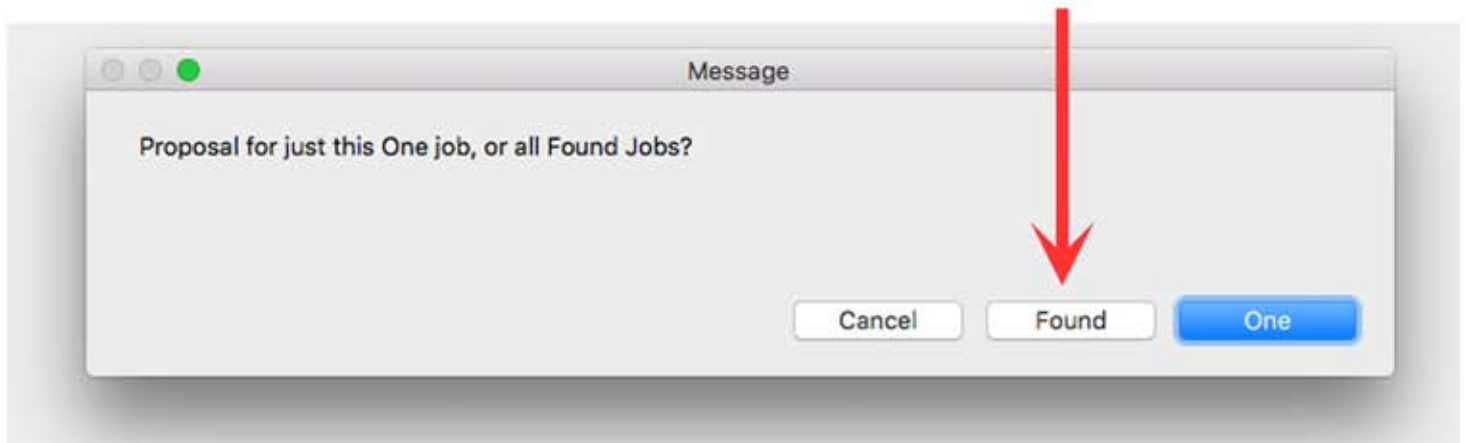
Project	Memos	Contact	To Do
[heidel2017]			
Heidelberg Web Press Brochure 2017			
Heidelberg Presentation Folder 2017			
Heidelberg Service Brochure 2017			
Heidelberg Sheetfed Brochure 2017			

The Multi-Page Proposal:

**1) Unite a Project, and from the QUOTE screen, select
Output > Email Proposal PDF or Proposal, Name PDF.**



2) Keep the Found Set when asked!



3) The resulting PDF will contain as many pages as there are jobs in your project.

If you chose Email Proposal PDF, it will be attached to an email addressed to the customer, ready to send.

If you chose Proposal, Name PDF, you will give it a name and a save location. This will allow you to add a Spreadsheet or Matrix to the Multi-Page Proposal.

See next page to learn how to make a Project Matrix or Spreadsheet.

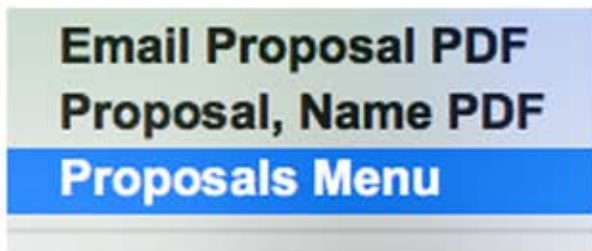
The Proposal Spreadsheet / Matrix:

This is a summary of the jobs in a Project, that focuses on the pricing, either by comparing the various versions of a proposed job (Matrix), or adding all the jobs up into a grand total (Spreadsheet).

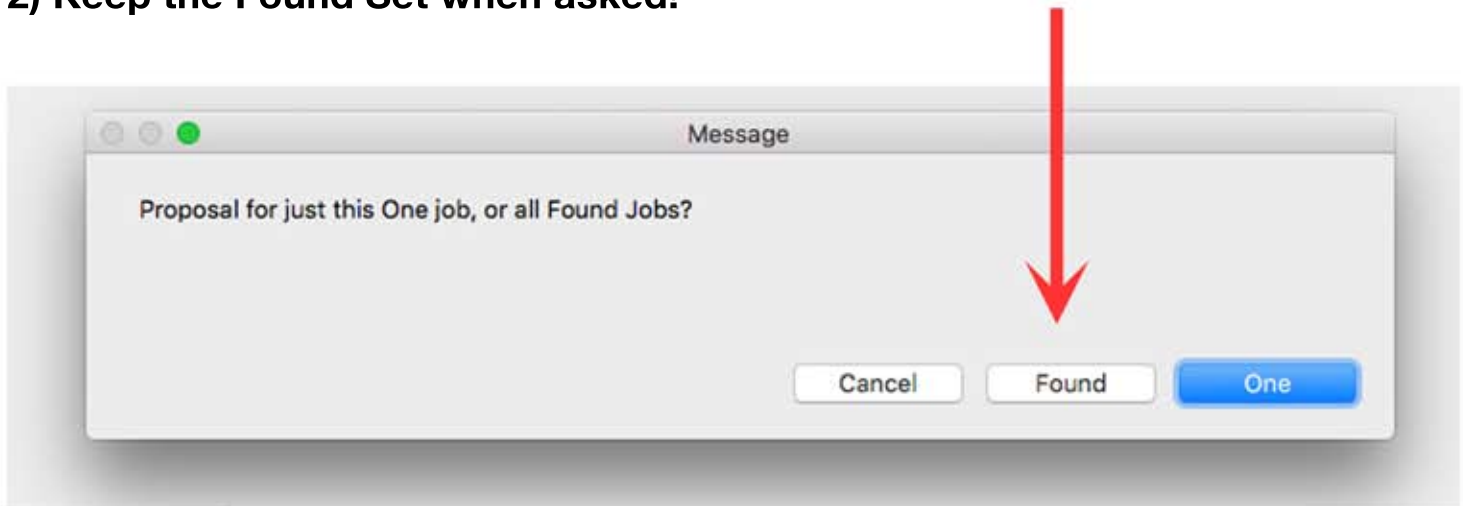
1) Unite a Project, and proceed to the Proposals Menu.

Go To > Proposals Menu

Or, from the QUOTE screen, Output > Proposals Menu.

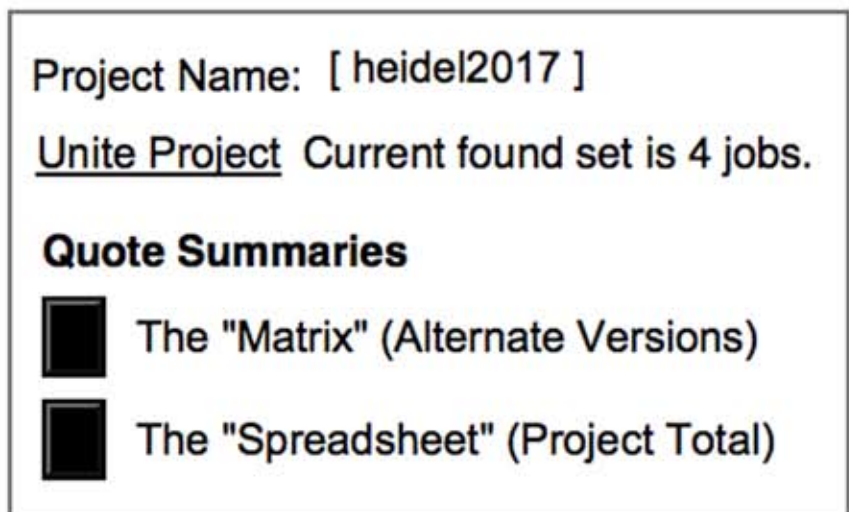


2) Keep the Found Set when asked!



3) In the Quote Summaries box, in the bottom right corner, Choose either The Matrix or The Spreadsheet.

Examples of each follow:





5563 Calle Ocho
Carpinteria CA 93013
408-666-7356
jim@carpedata.com
www.carpedata.com

Quotation Summary

Title / Description / Estimate #		Quantity / Price					
Capabilities Brochure 16p							
16 Pages, Plus Cover							
01-21810							
		<u>1,000</u>	<u>2,000</u>	<u>3,000</u>	<u>4,000</u>	<u>5,000</u>	<u>6,000</u>
Price		\$4,868.00	\$8,762.00	\$11,828.00	\$14,193.00	\$15,968.00	\$17,246.00
Each		\$4.868	\$4.381	\$3.9427	\$3.5483	\$3.1936	\$2.8743
Capabilities Brochure 20p							
20 Pages, Plus Cover							
01-21811							
		<u>1,000</u>	<u>2,000</u>	<u>3,000</u>	<u>4,000</u>	<u>5,000</u>	<u>6,000</u>
Price		\$5,921.00	\$10,658.00	\$14,388.00	\$17,265.00	\$19,424.00	\$20,978.00
Each		\$5.921	\$5.329	\$4.796	\$4.3163	\$3.8848	\$3.4963
Capabilities Brochure 24p							
24 Pages, Plus Cover							
01-21812							
		<u>1,000</u>	<u>2,000</u>	<u>3,000</u>	<u>4,000</u>	<u>5,000</u>	<u>6,000</u>
Price		\$6,429.00	\$11,573.00	\$15,623.00	\$18,747.00	\$21,090.00	\$22,778.00
Each		\$6.429	\$5.7865	\$5.2077	\$4.6868	\$4.218	\$3.7963
Capabilities Brochure 28p							
28 Pages, Plus Cover							
01-21813							
		<u>1,000</u>	<u>2,000</u>	<u>3,000</u>	<u>4,000</u>	<u>5,000</u>	<u>6,000</u>
Price		\$8,517.00	\$15,330.00	\$20,696.00	\$24,834.00	\$27,939.00	\$30,174.00
Each		\$8.517	\$7.665	\$6.8987	\$6.2085	\$5.5878	\$5.029
Capabilities Brochure 32p							
32 Pages, Plus Cover							
01-21814							
		<u>1,000</u>	<u>2,000</u>	<u>3,000</u>	<u>4,000</u>	<u>5,000</u>	<u>6,000</u>
Price		\$9,198.00	\$16,557.00	\$22,352.00	\$26,822.00	\$30,174.00	\$32,588.00
Each		\$9.198	\$8.2785	\$7.4507	\$6.7055	\$6.0348	\$5.4313
Capabilities Brochure 36p							
36 Pages, Plus Cover							
01-21815							
		<u>1,000</u>	<u>2,000</u>	<u>3,000</u>	<u>4,000</u>	<u>5,000</u>	<u>6,000</u>
Price		\$9,815.00	\$17,666.00	\$23,849.00	\$28,619.00	\$32,196.00	\$34,772.00
Each		\$9.815	\$8.833	\$7.9497	\$7.1548	\$6.4392	\$5.7953



Quotation Summary

Title / Description / Estimate #	Quantity / Price					
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Heidelberg Web Press Brochure 2017

24 pages + cover and BRC

01-189

	<u>45,000</u>	<u>60,000</u>	<u>75,000</u>	<u>90,000</u>	<u>100,000</u>	<u>120,000</u>
Price	\$14,814.00	\$17,777.00	\$19,999.00	\$21,599.00	\$21,599.00	\$23,327.00
Each	\$0.329	\$0.296	\$0.267	\$0.24	\$0.216	\$0.194
+ Est Freight	\$125.00	\$149.00	\$157.00	\$218.00	\$256.00	\$301.00
Total	\$14,939.00	\$17,926.00	\$20,156.00	\$21,817.00	\$21,855.00	\$23,628.00

Heidelberg Presentation Folder 2017

4 page presentation folder with 2 capacity pockets.

01-190

	<u>45,000</u>	<u>60,000</u>	<u>75,000</u>	<u>90,000</u>	<u>100,000</u>	<u>120,000</u>
Price	\$59,401.00	\$71,121.00	\$79,961.00	\$86,282.00	\$86,582.00	\$93,501.00
Each	\$1.32	\$1.185	\$1.066	\$0.959	\$0.866	\$0.779
+ Est Freight	\$123.00	\$234.00	\$345.00	\$456.00	\$567.00	\$678.00
Total	\$59,524.00	\$71,355.00	\$80,306.00	\$86,738.00	\$87,149.00	\$94,179.00

Heidelberg Service Brochure 2017

12 pages + cover

01-191

	<u>45,000</u>	<u>60,000</u>	<u>75,000</u>	<u>90,000</u>	<u>100,000</u>	<u>120,000</u>
Price	\$26,118.00	\$34,730.00	\$43,342.00	\$51,954.00	\$57,695.00	\$69,177.00
Each	\$0.58	\$0.579	\$0.578	\$0.577	\$0.577	\$0.576
+ Est Freight	\$123.00	\$234.00	\$345.00	\$456.00	\$567.00	\$678.00
Total	\$26,241.00	\$34,964.00	\$43,687.00	\$52,410.00	\$58,262.00	\$69,855.00

Heidelberg Sheetfed Brochure 2017

24 pages + cover

01-192

	<u>45,000</u>	<u>60,000</u>	<u>75,000</u>	<u>90,000</u>	<u>100,000</u>	<u>120,000</u>
Price	\$19,800.00	\$24,800.00	\$29,274.00	\$33,165.00	\$35,180.00	\$39,941.00
Each	\$0.44	\$0.413	\$0.39	\$0.369	\$0.352	\$0.333
+ Est Freight	\$123.00	\$234.00	\$345.00	\$456.00	\$567.00	\$678.00
Total	\$19,923.00	\$25,034.00	\$29,619.00	\$33,621.00	\$35,747.00	\$40,619.00

Grand Totals	\$120,627.00	\$149,279.00	\$173,768.00	\$194,586.00	\$203,013.00	\$228,281.00
Each	\$2.6806	\$2.4880	\$2.3169	\$2.1621	\$2.0301	\$1.9023

Grand Totals summarize the Totals for each job, which include the options that are shown.

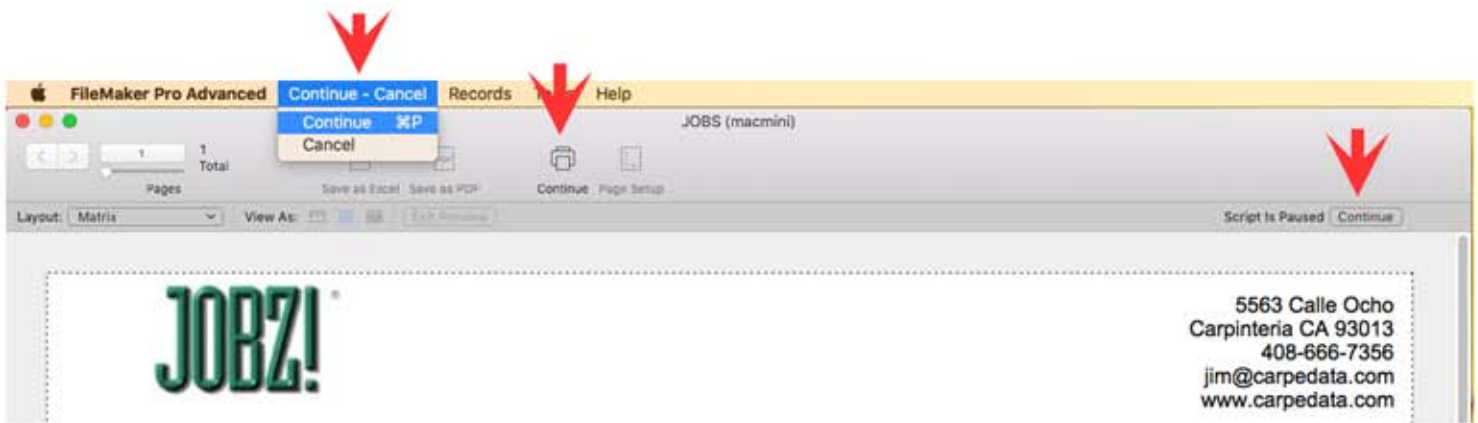
To add a Matrix or a Spreadsheet to a Multi-Page Proposal:

1) Make a Multi-Page Proposal using Output > Proposal, Name PDF from a Project (Found Set) naming it and saving it to a specific location.

2) From the Matrix or Spreadsheet, click Print or PDF.



3) This will Preview your document, and if it looks good, choose Continue, otherwise Cancel and make some edits.



4) Select PDF, then Append.



5) Point to the Multi-Page Proposal you saved a minute ago, and click OK.

When you then open that PDF you will find that the Matrix or Spreadsheet has been appended to the Multi-Page Proposal, and you can send it out!

This Append feature is available whenever you choose a Name PDF output, so keep it in mind. You could start with a Memo or Cover Sheet, then append a Proposal, or some other document. Or you can start with the Matrix, and append the Multi-Page Proposal.

Some Tricks on the Matrix / Spreadsheet:

From the Spreadsheet, you can toggle to the Matrix, and vice-versa. The difference is that the Spreadsheet will total the Project at the bottom.



If you are using the Job Totals on the QUOTE Screen, to show what the Options add to the base price, you can use the Spreadsheet with Job Totals to include all of the Job Totals in the Grand Total.

QUOTE Screen, Total the Options.

+ Est Freight	\$123.00
☒ Total	19,923.00

	<u>45,000</u>
Price	\$19,800.00
Each	\$0.44
+ Est Freight	\$123.00

Total	\$19,923.00
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Grand Totals	\$120,627.00
Each	\$2.6806

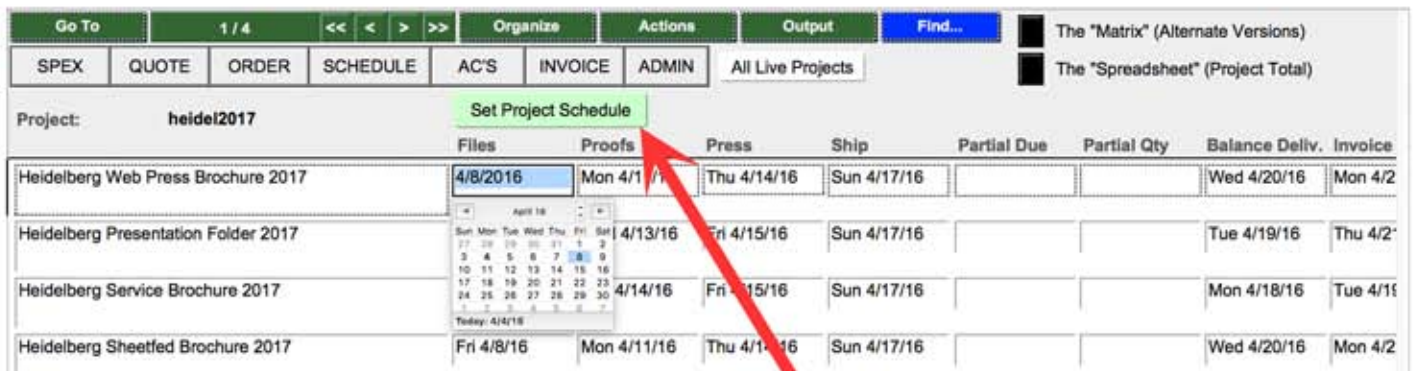
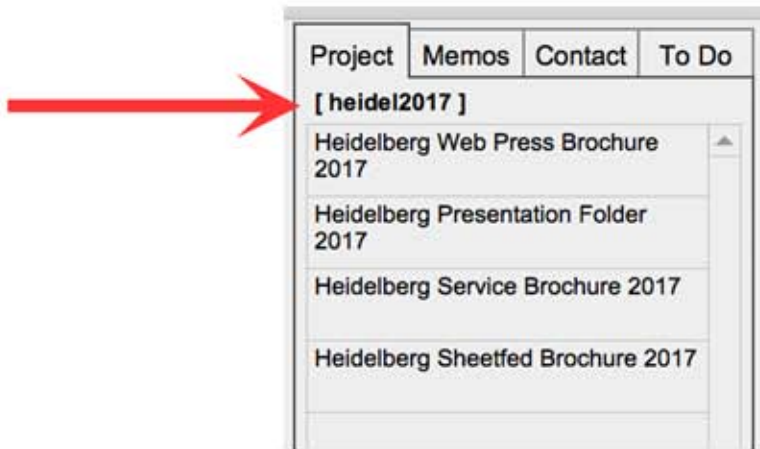
The check-boxes for showing unit prices, per M and per additional M are here as well as on the QUOTE screen.

<u>120,000</u>	
\$23,327.00	☒ Each
\$0.194	☐ /M
\$301.00	☐ +M

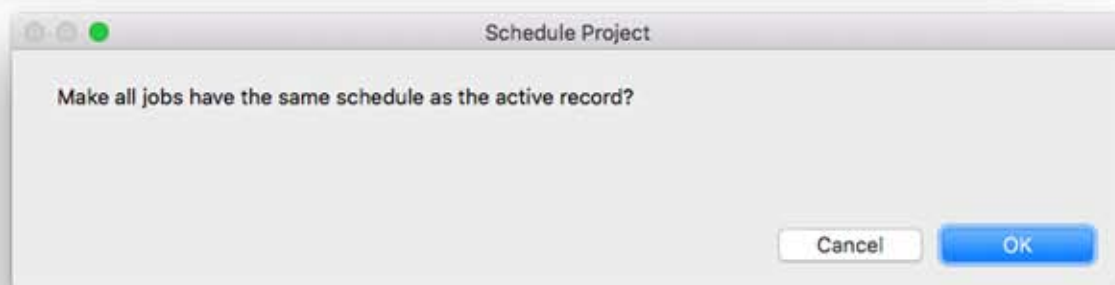
\$23,628.00	☒ Total
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The Project Schedule Trick:

On the Project Portal, click the [ProjectName] and it will not only unite the project, but it will take you to the Project Schedule screen.



Click onto one of the jobs, make any changes to the schedule of that job, and then click the green Set Project Schedule button. It will make all the schedules the same as that job!



A final note:

Though you can present options on a single page Proposal, the SPEX can become a little complicated.

A primary advantage of cloning a job to create options or variations is that when the customer decides which way they want to go, you can then turn that one job into an ORDER without confusing Production about which version is being ordered.

You now know how easy it is to present variations as separate jobs, and how to batch process them as a Project, and how to present them as a Matrix.

Or get the whole Project by clearly summarizing them as a Spreadsheet.

Good Selling!

And thanks for using JOBZ!

**Always at your service,
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jim@carpedata.com
408-666-7356**