



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 |
|-------|-----------|----|---|---|----|----------|

(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.

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.

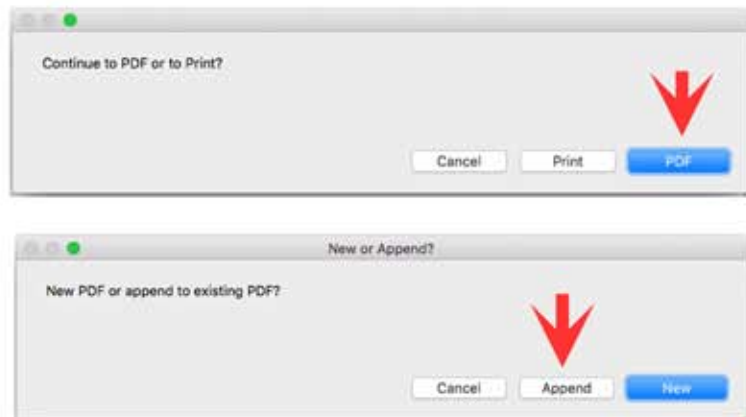
2) From the Matrix or Spreadsheet, click Print or PDF.



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 |
| <input checked="" type="checkbox"/> Total | 19,923.00 |

| | |
|---------------|---------------|
| | 45,000 |
| Price | \$19,800.00 |
| Each | \$0.44 |
| + Est Freight | \$123.00 |

| | |
|-------|-------------|
| Total | \$19,923.00 |
|-------|-------------|

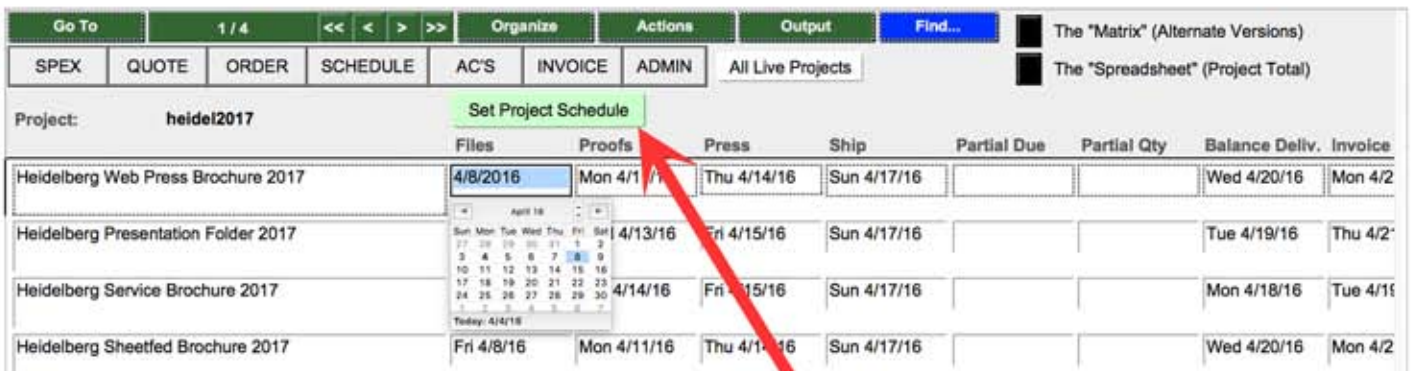
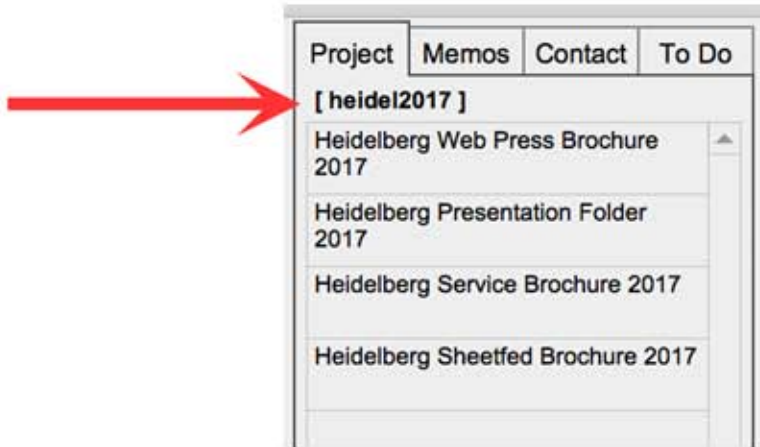
| | |
|---------------------|--------------|
| Grand Totals | \$120,627.00 |
| Each | \$2.6806 |

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

| | |
|----------------|---|
| 120,000 | |
| \$23,327.00 | <input checked="" type="checkbox"/> Each |
| \$0.194 | <input checked="" type="checkbox"/> /M |
| \$301.00 | <input checked="" type="checkbox"/> +M |
| \$23,628.00 | <input checked="" type="checkbox"/> Total |

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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