



JOBZ! Workflow Example Documents

The following pages illustrate the key workflow documents produced by JOBZ!

RFE (Request for Estimate) with sketch
Dummy Request
Proposal & Proposal Summary
SOP (Sales Order to Production) with Delivery Instructions
Confirmation of Order
Customer Alterations (Author's Changes) Memo- Customer and Plant
Invoice / Sales Draft for Billing

Behind the examples here is an intuitive user interface that guides the user through specifying, quoting and managing custom printing projects. Data entry shortcuts can be personalized for each user. Field checking based on Business Rules helps ensure that complete information flows to Estimating and Production.

Email communication of all documents and reports is integrated, with PDF files created and/or appended, saved locally and automatically attached to email messages. Customer-facing documents include full-color logo letterhead, personal signatures and individualized return-address information. Multiple corporate identities may be selected, enabling representation of affiliated companies.

Customer contact information is linked dynamically with job correspondence as part of a complete Customer Relationship Management system.

Jobs may be combined in projects, cloned for alternate versions and stored as templates.

Contract terms & conditions may be personalized by management. Proposals are legally binding.

Commercial Print, Digital, Wide Format, Envelopes, Flexible Packaging and Corrugated or Folding Cartons may be specified easily, with shortcuts for sizes and styles, substrates etc. that are unique to these specialties. Generic (non-print) jobs may be handled as well. The Campaign work type enables line item lists of 50+ related pieces. An integrated Mailing workflow is fully enabled.

Digital short-run (quick-order) work may be handled efficiently with templates and a pricing calculator.

The JOBZ! sales workflow is compatible with any estimating and production software you may already have. An email interface enables copy/paste of sales-entered data in the estimate and job ticket process.

Users can handle a large number of simultaneous jobs through sorting routines that separate working jobs from those awaiting client approval, jobs that are in estimating, etc. Sales forecasting of both booked and upcoming sales is based on information entered in the workflow process. Commission visualization helps the sales rep price jobs in line with management objectives.

A complete brokerage workflow is available, involving multiple estimators, vendors and purchase orders.

These sample documents represent just the tip of the iceberg. Other areas of capability handled by JOBZ! and related to the job workflow include:


CONTACT MANAGEMENT (CRM) - SALES REPORTING - SALES FORECASTING - ANNUAL SALES PROJECTIONS - INFORMED SALES MANAGEMENT - ACCOUNT DISTRIBUTION & CHALLENGES - MARKETING - CORRESPONDENCE - MERGE MAIL - DIGITAL JOB MATRIX PRICING

Visit www.carpedata.com for more information. Call for an online tour: 408-666-7356

REQUEST FOR ESTIMATE

Est# 01-4154 Job# 10225-17 Record # 01-21883
8/4/2017 10:50:42 AM

New Request

From: Jim Taylor JOBZ! by Carpe Data Customer: 11 by Seventeen Al Gorithm 408-666-7356  Cust.#: 36805	Due: 8/5 Plant: NY W Type: New Job Prev: 10220-16	Files 8/22/17 Proofs 8/25/17 Press 8/29/17 Ship 9/1/17 Bal Deliv 9/4/17
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Title	JOBZ! Workflow Documents Example	Part# 183A-16
Description	12 Page + Double Gatefold Cover	
Notes	Specifications, once entered, are recycled throughout the project's life. The primary documents are the Request for Estimate, the Proposal, the Sales Order to Production, and the Invoice Draft. As the job goes through its life cycle, incremental information is added, and archived for future reference.	
Size	8-1/2 x 11"	
Cover Flat Size	11 x 33.5"	
Cover	100# Gloss Cover, FSC Certified 6/6: 4C Process + PMS + Spot Varnish	
Text	100# Gloss Book, FSC Certified 6/6: 4C Process + PMS + Spot Varnish	
This information fuels the rest of the workflow.		
Proofs Furnished	High-resolution Imposition, PDF High-Res PDF files sent via FTP Files with high resolution images in position	
Finishing	Saddle stitch with die scored cover, text face trim flush with cover	
Packaging Freight	Shrink wrap in convenient packages, pack in cartons & label FOB Origin Freight Additional Carpinteria CA 93013 USA	
Notes	A single job can have up to 5 components, or a line item table of up to 50. Jobs can also be contained in a Project composed of any number of jobs. These notes appear on the RFE and the Proposal.	

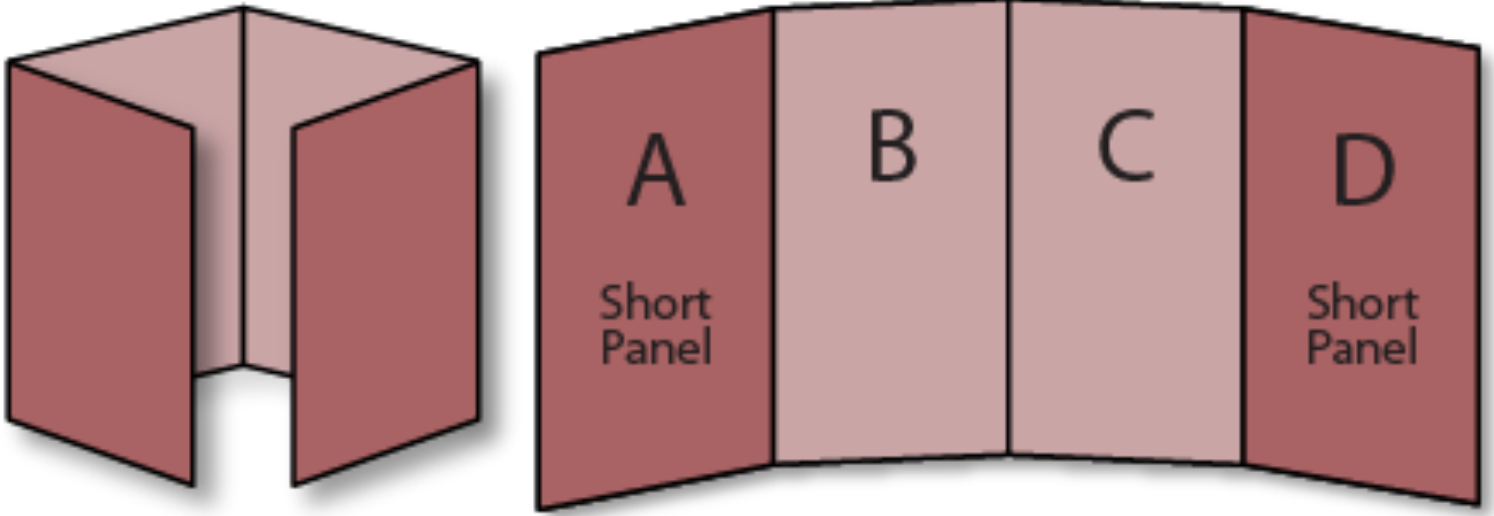
(+/- 2%) Quantity	45,000	55,000	75,000	90,000	100,000	120,000
Customer Samples	100					
Press Approval	Customer & Rep					
Resolution	20 Micron					
The Competition	Nemesis Printing					

Estimating Note This is a short note to the estimator. A sketch can be attached.

Production Note This is a short note to the CSR/Planner, on the SOP and RFE

Sketch Attached

You can attach a sketch





Dummy Request

Sales: Jim Taylor

Est# 01-4154 Job# 10225

Aug 4, 2017

Title JOBZ! Workflow Documents Example Part# 183A-16

Description 12 Page + Double Gatefold Cover

Notes Specifications, once entered, are recycled throughout the project's life. The primary documents are the Request for Estimate, the Proposal, the Sales Order to Production, and the Invoice Draft. As the job goes through its life cycle, incremental information is added, and archived for future reference.

Size 8-1/2 x 11"

Cover Flat Size 11 x 33.5"

Cover 100# Gloss Cover, FSC Certified
6/6: 4C Process + PMS + Spot Varnish

Text 100# Gloss Book, FSC Certified
6/6: 4C Process + PMS + Spot Varnish

Finishing Saddle stitch with die scored cover, text face trim flush with cover

Notes Often, the first re-use of the specifications is the creation of a dummy request. If you like it can be titled CAD Request, Prototype Request etc. It also includes the sketch, as page 2, which follows.

Ship to

Sales Rep
Jim Taylor
5563 Calle Ocho
Carpinteria CA 93013
408-666-7356
jim@carpedata.com
http://www.carpedata.com

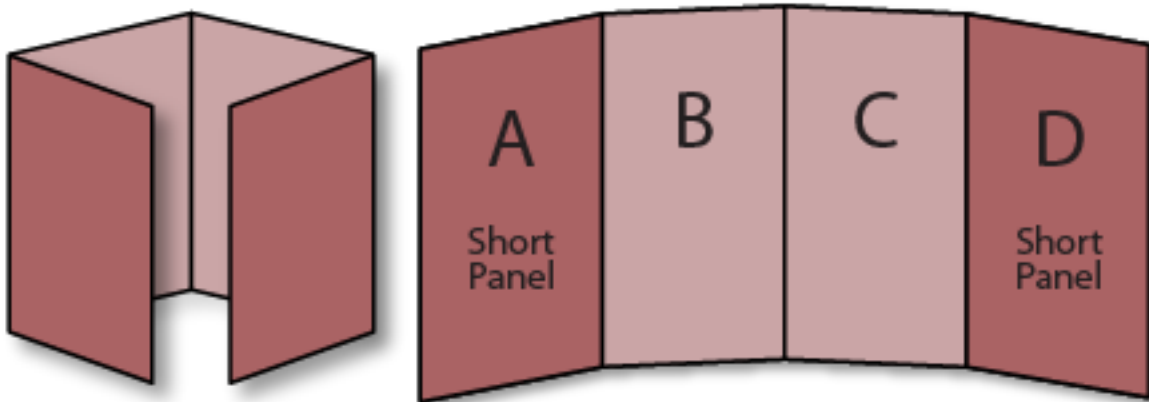
Copy to
 Customer
Al Gorithm
11 by Seventeen
5563 Calle Ocho
Carpinteria, CA 93013 USA
408-666-7356

Copy to
 Production
Patsi Cline
JOBZ! by Carpe Data

Proposed Schedule	Files	Proofs	Press	Ship	Bal Deliv
	Aug. 22	Aug. 25	Aug. 29	Sep. 1	Sep. 4

Page 2 of Dummy Request

You can attach a sketch





The Proposal

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

August 4, 2017 Est# 01-4154 Job# 10225-17
support@carpedata.com 408-666-7356

Proposal For: AI Gorithm, 11 by Seventeen

Title JOBZ! Workflow Documents Example **Part#** 183A-16

Description 12 Page + Double Gatefold Cover

Notes Specifications, once entered, are recycled throughout the project's life. The primary documents are the Request for Estimate, the Proposal, the Sales Order to Production, and the Invoice Draft. As the job goes through its life cycle, incremental information is added, and archived for future reference.

Size 8-1/2 x 11"



Cover Flat Size 11 x 33.5"

Cover 100# Gloss Cover, FSC Certified
6/6: 4C Process + PMS + Spot Varnish

Text 100# Gloss Book, FSC Certified
6/6: 4C Process + PMS + Spot Varnish

Proofs Furnished High-resolution Imposition, PDF
High-Res PDF files sent via FTP
Files with high resolution images in position

Finishing Saddle stitch with die scored cover, text face trim flush with cover

Packaging Freight Shrink wrap in convenient packages, pack in cartons & label
FOB Origin Freight Additional Carpinteria CA 93013 USA

Notes A single job can have up to 5 components, or a line item table of up to 50. Jobs can also be contained in a Project composed of any number of jobs. These notes appear on the RFE and the Proposal.

(+/- 2%) Quantity	<u>45,000</u>	<u>55,000</u>	<u>75,000</u>	<u>90,000</u>	<u>100,000</u>	<u>120,000</u>
Price	\$21,212.00	\$25,667.00	\$34,650.00	\$41,164.00	\$45,280.00	\$53,793.00
Each	\$0.4714	\$0.4667	\$0.462	\$0.4574	\$0.4528	\$0.4483
+ Mailing	\$2,134.00	\$2,789.00	\$3,456.00	\$4,657.00	\$5,431.00	\$5,987.00
+ Postage	\$20,250.00	\$24,750.00	\$33,750.00	\$40,500.00	\$45,000.00	\$54,000.00
Total	\$43,596.00	\$53,206.00	\$71,856.00	\$86,321.00	\$95,711.00	\$113,780.00

Thank you,

Files	Proofs	Press	Ship	Bal Deliv
Aug. 22	Aug. 25	Aug. 29	Sep. 1	Sep. 4

Proposed Schedule

Accepted by: AI Gorithm for 11 by Seventeen X _____ Date _____

Terms of Sale: C.O.D. or Net 30 days on approved credit. The attached terms & conditions are a material part of this quotation and include a limited warranty, disclaimers of warranties, and a limitation of customer's damages and remedies. Acceptance of this offer shall include acceptance of all of the terms & conditions. All applicable taxes will be added to the prices herein. Prices are subject to change based on availability of materials, press time and current price of paper. Quotations over 30 days old are subject to review. Record # 01-21883

Jim Taylor
JOBZ! by Carpe Data



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	\$19,824.00	\$24,800.00	\$29,274.40	\$33,165.20	\$32,580.00	\$39,941.20
Each	\$0.4405	\$0.4133	\$0.3903	\$0.3685	\$0.3258	\$0.3328
+ Est Freight	\$156.00	\$234.00	\$345.00	\$456.00	\$567.00	\$678.00
Total	\$19,980.00	\$25,034.00	\$29,619.40	\$33,621.20	\$33,147.00	\$40,619.20


Grand Totals	\$120,684.00	\$149,279.00	\$173,768.40	\$194,586.20	\$200,413.00	\$228,281.20
Each	\$2.6819	\$2.4880	\$2.3169	\$2.1621	\$2.0041	\$1.9023

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

Summarize a Project containing multiple jobs.

REVISED SALES ORDER TO PRODUCTION 8/7/2017

NY W Brochures Patsi Cline
Record # 01-21883 8/4/2017 11:32:39 AM

Sales Rep: Jim Taylor Customer #: 36805 Customer: 11 by Seventeen Al Gorithm 408-666-7356 	Revised for: Ink change	Job: 10225-17 Est: 01-4154 PO: To Come Type: New Job Prev: 10220-16	Files 8/22/17 Proofs 8/25/17 Press 8/29/17 Ship 9/1/17 Bal Deliv 9/4/17
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Revised SOP is highlighted in red

Title	JOBZ! Workflow Documents Example	Part# 183A-16
Description	12 Page + Double Gatefold Cover	
Notes	Specifications, once entered, are recycled throughout the project's life. The primary documents are the Request for Estimate, the Proposal, the Sales Order to Production, and the Invoice Draft. As the job goes through its life cycle, incremental information is added, and archived for future reference.	
Size	8-1/2 x 11"	
Cover Flat Size	11 x 33.5"	
Cover	100# Gloss Cover, FSC Certified	
Text	6/6: 4C Process + PMS + Spot Varnish	
	100# Gloss Book, FSC Certified	
	6/6: 4C Process + PMS + Spot Varnish	
	<p>The same information is provided to everyone- Estimator, Production and the Customer.</p> <p>Everybody's on the same page.</p>	
Proofs Furnished	High-resolution Imposition, PDF High-Res PDF files sent via FTP Files with high resolution images in position	
Finishing Packaging Freight	Saddle stitch with die scored cover, text face trim flush with cover Shrink wrap in convenient packages, pack in cartons & label FOB Origin Freight Additional Carpinteria CA 93013 USA	
To Schedule: Litho		

Order Quantity (+/- 2%)	Selling Price	Cost	Sell @
90,000	\$41,164.00	\$41,163.96	100.0%

Press Approval	Customer & Rep	\$457.3778 /M
Match Color To Resolution	Color Proofs, Ink Drawdown, Previous OK 20 Micron	Proof Turnaround Same Day

Production Note This is a short note to the CSR/Planner, on the SOP and RFE

DELIVERY INSTRUCTIONS 11 by Seventeen - JOBZ! Workflow Documents Example

Customer: 11 by Seventeen
Job Title: JOBZ! Workflow Documents Example
 Part# 183A-16

Est #: 01-4154
Job #: 10225-17
Record #: 01-21883
PO #: To Come

Rep: Jim Taylor
Date: Aug 4, 2017

Sales Samples: 15 Samples to Sample Room **Customer Samples:** 100

General Delivery Notes: Cartons need to be less than 40#

Order Qty: 90,000 (+/- 2%)
Destined: 90,000
Difference: 0

Customer Contact:
 11 by Seventeen
 Al Gorithm
 5563 Calle Ocho
 Carpinteria CA 93013 USA
 408-666-7356

Proofs ATTN:
 Database Testing, Inc.
 Rich Text
 1999 S. Bascom Ave. Ste 400 5th Floor San Jose CA 93013
 408-666-7356 support@carpedata.com

Invoice ATTN:
 Otto Correct
 11 by Seventeen
 5563 Calle Ocho
 Carpinteria CA 93013 USA

The customer cast.

Samples & Delivery Destinations:

100 Samples Ship: 8/10/2017 Due: 8/10/2017 Via: Sales Rep

11 by Seventeen
 Al Gorithm 408-666-7356
 5563 Calle Ocho
 Carpinteria CA 93013 USA

Delivery notes specific to Al Gorithm

45000 Qty Ship: 8/10/2017 Due: 8/14/2017 Via: Best Way

11 by Seventeen
 Al Gorithm 408-666-7356
 5563 Calle Ocho
 Carpinteria CA 93013 USA

Delivery notes specific to Al Gorithm

45000 Qty. Ship: 8/10/2017 Due: 8/14/2017 Via: LTL Truck

11 by Seventeen
 Santa Barbara Store #69 408-666-7356
 116 Yanonali Street
 Santa Barbara CA 93101

Delivery notes specific to Santa Barbara Store #69

**Second page of SOP, with Delivery Instructions.
 Room for many destinations, all pulled in from
 the contact database.**



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

PO No. To Come
 August 4, 2017 Est# 01-4154 Job# 10225-17
 support@carpedata.com 408-666-7356

Confirmation: AI Gorithm, 11 by Seventeen

Thank-you for choosing us. Your order is in production as follows:

Title JOBZ! Workflow Documents Example **Part#** 183A-16
Description 12 Page + Double Gatefold Cover

Notes Specifications, once entered, are recycled throughout the project's life. The primary documents are the Request for Estimate, the Proposal, the Sales Order to Production, and the Invoice Draft. As the job goes through its life cycle, incremental information is added, and archived for future reference.

Size 8-1/2 x 11"



Cover Flat Size 11 x 33.5"

Cover 100# Gloss Cover, FSC Certified
 6/6: 4C Process + PMS + Spot Varnish

Text 100# Gloss Book, FSC Certified
 6/6: 4C Process + PMS + Spot Varnish

Proofs High-resolution Imposition, PDF
Furnished High-Res PDF files sent via FTP
 Files with high resolution images in position

Finishing Saddle stitch with die scored cover, text face trim flush with cover

Packaging Shrink wrap in convenient packages, pack in cartons & label
Freight FOB Origin Freight Additional Carpinteria CA 93013 USA

(+/- 2%) **Qty / Price** 90,000 **\$41,164** \$0.4574 each + Mailing \$3,195

Files	Tue 8/22/17	Important notes about the schedule. A schedule for job with Mailing can include dates for: List Purchase, Mail Files, Postage, Ink Jet, First and Last In-Home.
Proofs	Fri 8/25/17	
Press	Tue 8/29/17	
Ship	Fri 9/1/17	
Bal Deliv	Mon 9/4/17	

Thank you,

Jim Taylor
 JOBZ! by Carpe Data

The Confirmation of Order: One click away from the SOP.



Collect those Author's Changes!

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

Customer Alterations : 11 by Seventeen - JOBZ! Workflow Documents Example

Contact : Al Gorithm

Date : 8/30/17 001 Job # 10225-17

Description	Amount
1 Use JOBZ! to handle Author's Changes, and improve efficiency and profits. Data is entered easily, then sorted and presented in several possible ways, as printed forms or as PDF emails. The forms that are customer-facing include your letterhead logo and sales rep's signature. The internal forms also include instructions that the customer will not see.	\$200
2 There is no limit to the number of Rounds, or the number of line items. When printed out, the line items are numbered automatically. You may change the sequence if you wish, from the order they were created in, to any other numerical sequence. Line items are also easy to delete.	\$100
3 Amounts automatically total with the original quote to display the current job cost when sending an order update to the customer. They are automatically included in the Invoice Draft so that billing is simply a matter of specifying the shipping quantity. Any number of changes can be entered, and their sequence can be modified.	\$125
4 AC's can be re-sequenced in any order you like, by re-numbering them, and a whole set of AC's can be cloned over to a different job number.	\$125
5 The AC's can be sent by email to either the plant or the customer. The email can be a PDF with your corporate identity and sales rep signature.	\$250
6 The sooner a customer is advised of additional charges, the less likely they will dispute them at billing, right?	\$100
7 Memos to the Plant also display a field for internal comments, (not visible to customer) as well as a code- e.g.: AC, HE, NC etc. memos to the plant offer the option of including the prices, or not.	\$100
	Author's changes to date: \$1,000
	Quote: \$41,164
	+ Mailing \$3,195
	Total job costs to date: \$45,359

We are proceeding with these alterations. Costs will be included on our invoice.

Accepted For: 11 by Seventeen

By: Al Gorithm

X _____

Date _____

If you have any questions, please call.

Thank you,

Jim Taylor
JOBZ! by Carpe Data



Customer Alterations : 11 by Seventeen - JOBZ! Workflow Documents Example

Contact : Al Gorithm

Date : 8/30/17 001 Job # 10225-17

Line #		AC #	Amount
First Round			\$575
1	Use JOBZ! to handle Author's Changes, and improve efficiency and profits. Data is entered easily, then sorted and presented in several possible ways, as printed forms or as PDF emails. The forms that are customer-facing include your letterhead logo and sales rep's signature. The internal forms also include instructions that the customer will not see.	1	\$200
2	Amounts automatically total with the original quote to display the current job cost when sending an order update to the customer. They are automatically included in the Invoice Draft so that billing is simply a matter of specifying the shipping quantity. Any number of changes can be entered, and their sequence can be modified.	3	\$125
3	The AC's can be sent by email to either the plant or the customer. The email can be a PDF with your corporate identity and sales rep signature.	5	\$250
Second Round			\$325
4	There is no limit to the number of Rounds, or the number of line items. When printed out, the line items are numbered automatically. You may change the sequence if you wish, from the order they were created in, to any other numerical sequence. Line items are also easy to delete.	2	\$100
5	AC's can be re-sequenced in any order you like, by re-numbering them, and a whole set of AC's can be cloned over to a different job number.	4	\$125
6	Memos to the Plant also display a field for internal comments, (not visible to customer) as well as a code- e.g.: AC, HE, NC etc. memos to the plant offer the option of including the prices, or not.	7	\$100
Third Round			\$100
7	The sooner a customer is advised of additional charges, the less likely they will dispute them at billing, right?	6	\$100

Author's changes to date:	\$1,000
Quote:	\$41,164
+ Mailing	\$3,195
Total job costs to date:	\$45,359

We are proceeding with these alterations. Costs will be included on our invoice.

Accepted For: 11 by Seventeen

By: Al Gorithm

X _____

Date _____

If you have any questions, please call.

Thank you,

Jim Taylor
 JOBZ! by Carpe Data

The same information, presented to the plant.

Customer Alterations 10225-17 - 001

Customer: 11 by Seventeen
Job Title: JOBZ! Workflow Documents Example

Date: 8/30/17
Sales: Jim Taylor
Production: Patsi Cline
Estimate: 01-4154

Instructions (Plant & Customer)	Price / Hours	Internal	#
<p>Cover Photo</p> <p>Use JOBZ! to handle Author's Changes, and improve efficiency and profits. Data is entered easily, then sorted and presented in several possible ways, as printed forms or as PDF emails. The forms that are customer-facing include your letterhead logo and sales rep's signature. The internal forms also include instructions that the customer will not see.</p>	\$200 AC	Done	1
		The customer doesn't see these internal comments.	
<p>Center Spread</p> <p>There is no limit to the number of Rounds, or the number of line items. When printed out, the line items are numbered automatically. You may change the sequence if you wish, from the order they were created in, to any other numerical sequence. Line items are also easy to delete.</p>	\$100 AC	Due	2
		Only the changes in the left side are sent to the customer.	
<p>Center Spread</p> <p>Amounts automatically total with the original quote to display the current job cost when sending an order update to the customer. They are automatically included in the Invoice Draft so that billing is simply a matter of specifying the shipping quantity. Any number of changes can be entered, and their sequence can be modified.</p>	\$125 AC	Due	3
		Instantly update the customer with all job costs to date.	
<p>Cover Photo</p> <p>AC's can be re-sequenced in any order you like, by re-numbering them, and a whole set of AC's can be cloned over to a different job number.</p>	\$125 AC	Due	4
		Everything in Writing, without the Paperwork.	
<p>Cover Photo</p> <p>The AC's can be sent by email to either the plant or the customer. The email can be a PDF with your corporate identity and sales rep signature.</p>	\$250 AC	Due	5
<p>The sooner a customer is advised of additional charges, the less likely they will dispute them at billing, right?</p>	\$100	Due	6
		Finally!	
<p>Cover Photo</p> <p>Memos to the Plant also display a field for internal comments, (not visible to customer) as well as a code- e.g.: AC, HE, NC etc. memos to the plant offer the option of including the prices, or not.</p>	\$100 AC	Due	7
		Instantly update the customer with all job costs to date.	

Author's changes this memo: \$1,000



**All that is needed to produce an invoice
Draft is the shipping quantity,
unless there are no chargeable overs, in
which case you don't even need that.**

Otto Correct
11 by Seventeen
5563 Calle Ocho
Carpinteria CA 93013 USA

Date: September 7, 2017
Invoice # **10225**
Purchase Order # To Come
Our Job # Est# 01-4154 Job# 10225-17
Sales # 01
Customer # 36805

Invoice Draft

91,245 JOBZ! Workflow Documents Example Part# 183A-16
12 Page + Double Gatefold Cover

Notes Specifications, once entered, are recycled throughout the project's life. The primary documents are the Request for Estimate, the Proposal, the Sales Order to Production, and the Invoice Draft. As the job goes through its life cycle, incremental information is added, and archived for future reference.



90,000 Copies as quoted @	\$41,164.00
1,245 Additional/less copies @ \$102.59 /M	\$127.72
Customer Alterations per memo 8/30/2017 to AI Gorithm	\$1,000.00
Up to 5 additional line items can be added at the final stage.	\$500.00
Postage	\$40,500.00

See the full Mailing Workflow PDF.

+ Mailing	\$3,195.00
Subtotal	<u>\$86,486.72</u>
Freight	\$789.00
Tax	<u>\$6,918.94</u>
Invoice Total	\$94,194.66

Paid \$40,500.00

Track progress payments, postage Invoice etc.

Balance Due \$53,694.66

Terms of Sale: C.O.D. or Net 30 days on approved credit.

Invoice comments area; instructions about billing the job.

Call it what you like- Invoice Draft for the billing department, Pro-Forma Invoice for the customer, or just plain Invoice ready for mailing. It wraps up the workflow and archives the job for sales reports, future reference and cloning.

"Everything in Writing, Without the Paperwork."