

Proposals

Table of Contents

GETTING STARTED	1
Technical Support	1
Proposals Overview	3
Creating and Printing Proposals	8
Proposal Pricing	14
Contact Information	17
PROPOSAL SETS AND TEMPLATES	19
Creating Sets and Assemblies using Materials Lists	19
Proposal Templates	24
Customer Specific Product or Price List	28
PROCESSING PROPOSALS	33
Creating a Sales Order	33
Proposal Status Settings	37
Use Proposals in Job Costing	41
INDEX.....	43

Getting Started

Technical Support

Welcome to the instructional manual for the Proposal module within the Eagle Business Management System (EBMS). Eagle Solutions is pleased to provide you with instructions and tips regarding the Windows version of EBMS. In the sections following, explanations and examples of the available features in the Eagle Business Management System will be explained for optimal use of the System. If you need to reach our staff for further help, contact us using the information below:

Eagle Solutions

5351 Lincoln Highway, Suite 9

Gap, PA 17527

(717) 442-3247 x2

(717)-442-1096 fax

www.EagleBusinessSoftware.com

Email: Support@EagleBusinessSoftware.com

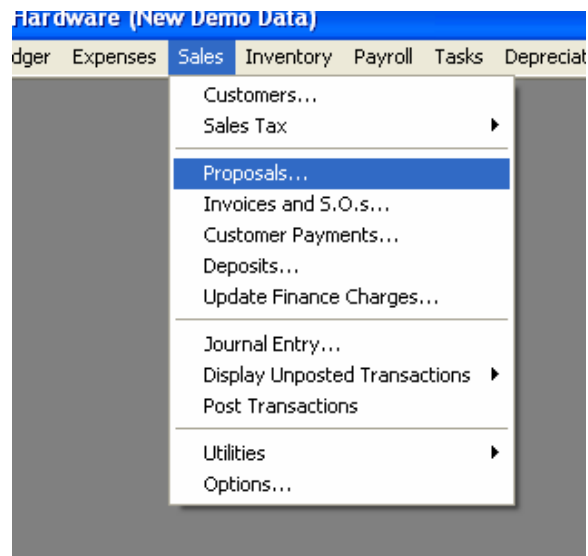
Proposals

Proposals Overview

The Proposals module within the EBMS system is a sales tool that can be used in a number of different ways:

- A. **Standard Proposal** - The most common use of the proposal window is to create customer proposals or sales quotes. A proposal may consist of a list of quoted inventory items or merely a detailed description list typed within the large proposal note tab. The proposal window includes many flexible pricing tools to assist the user in creating a proposal. Since a proposal does not affect inventory, the user should create a sales order as soon as a proposal is accepted. Review the Creating Proposals section below for more details.
- B. **Proposal Templates** - The proposal module can be used to create kits or assemblies such as a building package or equipment assembly. The user can create a quote from a predetermined set of items, kits, or options. The quote can be conveniently modified to meet the specific needs of the customer. It is easy to create a sales order immediately or when the customer accepts the proposal or quote. For example, if a customer wishes to purchase an entire computer system with software and peripherals, a predefined proposal listing all the standard components can be altered to meet the customer's needs. Review the Proposal Templates section below for more details.
- C. **Customer-Specific Product or Price Lists** – The Proposal window can be used to list specific products that are purchased by a customer. This customer-specific list allows the user to create a sales order from a predetermined product list. The product list may contain customer-specific pricing for assemblies or individual items. Review the Customer Specific Product or Price List section for more details.
- D. **Creating Budgets within Job Costing** – The proposal window is used within the job costing module to create budgets and to change orders. Review the Jobs > Entering a New Contract or Job Budget section within the Job Costing manual.

The Proposal module is found on the main sales menu.



Proposals

The proposal module is an EBMS add-on that is not included in all solutions. Contact your EBMS customer support representative if you wish to add this optional module. Open the proposal by selecting **Proposals** from the **Sales** menu as shown below.

The screenshot shows the 'Proposals - Keith Elmer' window. The 'Proposal' tab is active, displaying the following information:

- Proposal: 102
- Date: 06/15/2000 Thu
- Description: Add porch
- Customer: ELMKEI
- Price Level: Retail
- Warehouse: GENERAL

Quantity	Warehouse	Inventory	Description	Unit	Taxable	G/L Account	Unit
1.00	GENERAL		Masonry Labor	3,000.00	✓	51000-010	100.00
1.00	GENERAL		General Labor	3,300.00	✓	51000-010	135.00
1.00	GENERAL		Architech, Engineer, Plans	20,000.00	✓	51000-010	

Summary statistics:

- Items: 3.000000
- Hours: 235.00
- Subtotal: \$26,300.00
- Tax Table: PA
- Weight: 0.00
- Tax: \$1,578.00
- Total: \$27,878.00

- The **Proposal ID** is a unique number that identifies the proposal. This ID will increment to the next sequential number if the user does not enter a user-defined ID.
- The proposal **Date** is printed on the proposal document and identifies the date the proposal was created. The date must be changed manually if the proposal is changed and the user wishes to have the date reflect the time of the latest proposal revisions.
- The **Description** information is recorded to describe the proposal in a list or report and does not copy onto the sales invoice. A label or brief description should be entered into this field.
- The **Customer ID** code is used to identify the customer. This field must be entered before the sales order can be created from the proposal. The customer's name, address, and terms are copied into the **General Info** tab. If the customer ID code is blank, the user can manually enter customer information within the **General Info** tab.
- The **Job Id** will only show if the job costing modules are present.

The **Proposal** tab contains the main proposal detail. Review the Creating and Printing Proposals section for more details on entering and manipulating proposal information.

The **General Info** tab contains general information such as **Approval** and **Cost Method** settings. These settings are explained in the following processing and Proposal Pricing sections.

The **Contact Info** tab contains the customer's contact information as shown below:

- The customer's information is copied from the customer record when the **Customer ID** is entered. The **Customer ID** is located on the proposal header. Changing customer, terms, and other contact information will have no affect on the original customer record. Customer information can be manually entered by keeping the **Customer ID** blank.
- The **Next Contact** date can be used by the salesperson to prompt the **Next Contact**.

The **Job Info** tab contains the job site information such as job **Name**, **Address**, and **Job Date**.

Proposals

Proposals - American Retailers

File Edit Process View

LEVEL COPY 0.00

Proposal: 145 Date: 06/15/2000 Thu Description: Building Proposal

Customer: AMERET Job Id:

Proposal General Info Contact Info Job Info Note

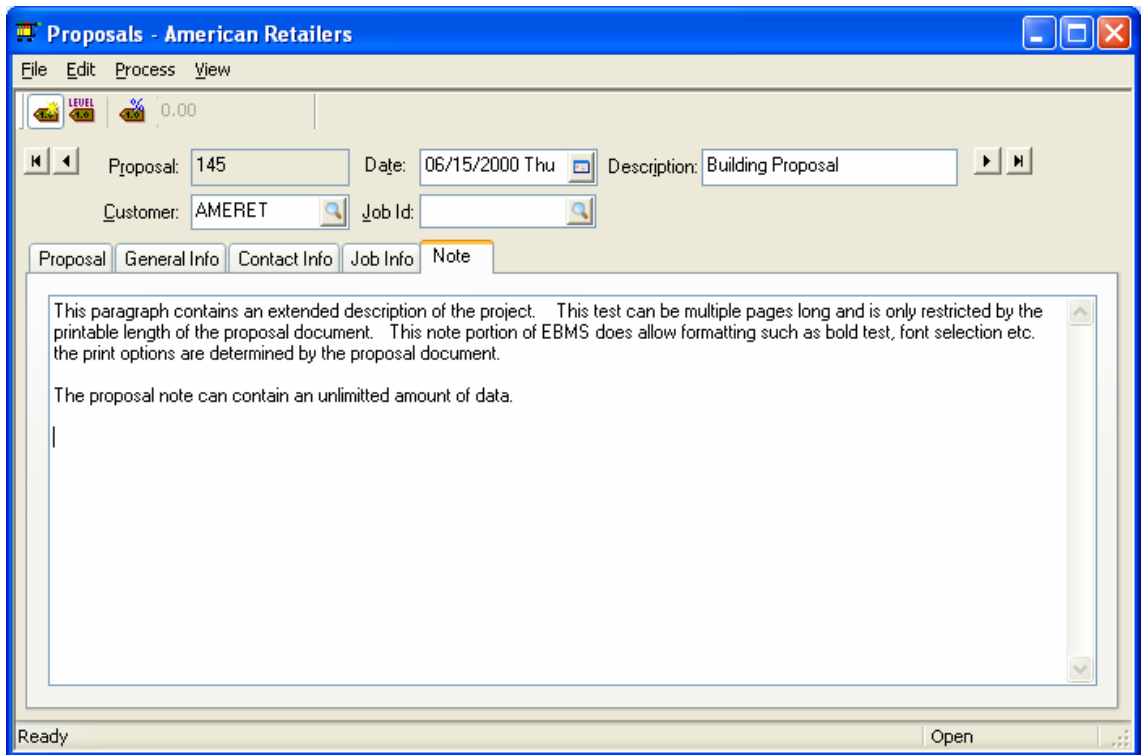
Name: Donaldson Job #123 Job Date: 07/10/2000 Mon

Address: 145 Main Street Apply to progress billing

City: Lancaster State: PA Zip: 12345

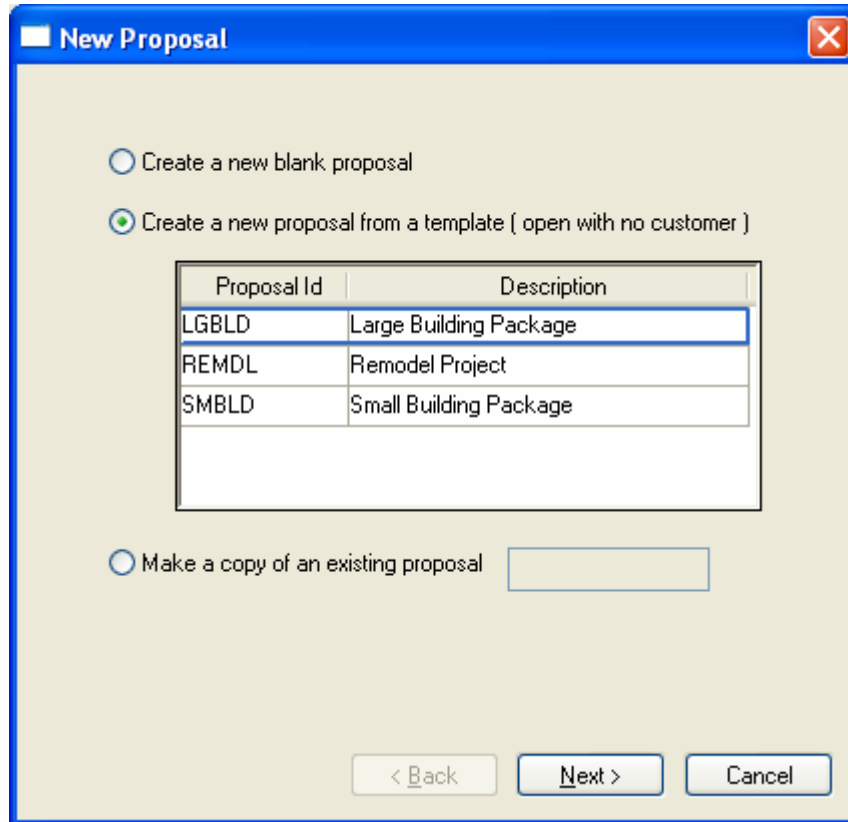
Ready Open

The **Note** tab can be used to type an extended description of the entire project. This tab is useful to record contractual details of the job or project. Multiple line descriptions should be used within the **Proposal** tab instead of the **Note** tab when multiple descriptions and prices are required. The **Note** tab allows a single project note that contains an unlimited amount of information.

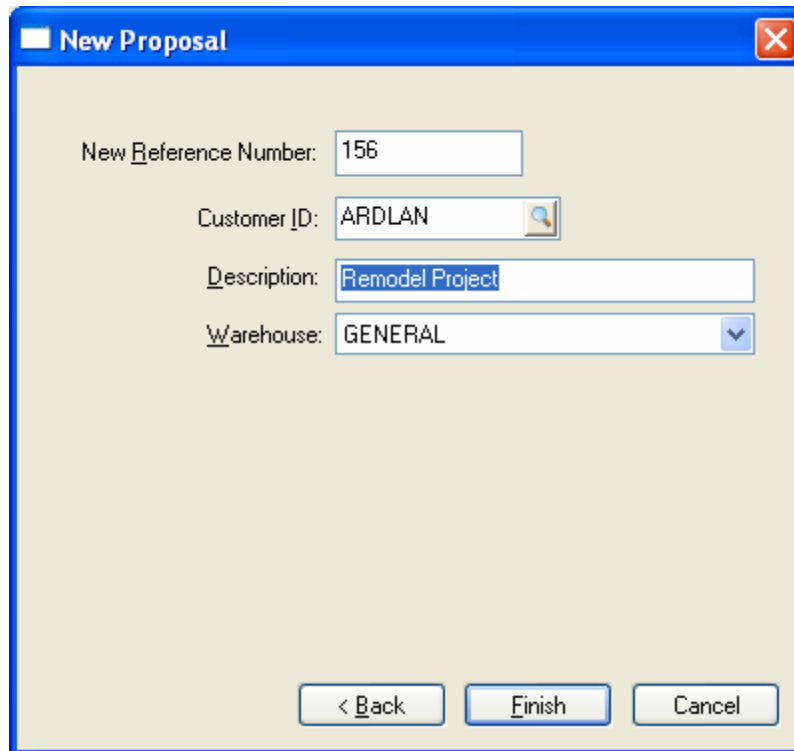


Creating and Printing Proposals

1. Select **File > New** from the proposal menu to create a new proposal, and the following dialog will open:



2. The first page of the new proposal wizard gives the user three options:
 - a. Select the **Create a new blank proposal** option to create a blank proposal.
 - b. Use the **Create a new proposal from a template** option to create a new proposal from a proposal template. A proposal will show on the template option list if the proposal's customer ID is blank. Review the Proposal Templates section for more details.
 - c. Select the **Make a copy of an existing proposal** option and identify the proposal to start with an existing proposal.
3. Click **Next** to continue.



The screenshot shows a 'New Proposal' dialog box with the following fields and values:

- New Reference Number: 156
- Customer ID: ARDLAN
- Description: Remodel Project
- Warehouse: GENERAL

Buttons at the bottom: < Back, Finish, Cancel

4. The **New Reference Number** is used as the identification for the new proposal and must be unique for each proposal. This number defaults to the **Next Reference Number** recorded in the **Sales > Options > Proposal** tab. The proposal reference number does not need to be numeric, but may contain any alphanumeric combination.
5. Set the appropriate **Customer ID** and **Description**.
6. Click on the **Finish** button to create the new proposal.
7. The Warehouse field will only appear if the Warehouse module is installed

Proposals

Qua..	Inventory	Description	Unit	Amount	T...	G...
1.00		General & Preparations			✓	
1.00		Masonry			✓	
1.00		Wood Materials			✓	
1.00		Doors & Windows			✓	
1.00		Interior Materials			✓	
1.00		Mechanical			✓	
1.00		Exterior			✓	
*						

Review the Proposal Pricing section for more details on the **Price Level** setting and other pricing options.

The proposal detail may consist of as little as a single line with the total contract price or it may include multiple paragraphs of contract information. The contract detail may be entered within the **Note** tab rather than typing multiple line paragraphs within the **Description** column. The proposal may contain a long list of inventory items that require multiple pages within the proposal. The proposal detail lines and materials lists are very similar to the line detail within a sales order. Review the Sales > Materials List section within the main manual.

8. Enter the **Quantity** of items being listed. The **Quantity** column must contain a value in order to calculate the extended **Amount** from the **Unit** price.
9. Enter an **Inventory** ID if you wish to list inventory items. Keep the **Inventory** column blank if you wish to manually enter a description. If an **Inventory ID** is entered, the Unit of **Measure**, **Description**, **Unit** price, **Taxable** switch, **G/L Account**, and the **Cost** amount are entered from the inventory item record.

Proposals - Arden's Landscaping

File Edit Process View

Proposal: 158 Date: 06/15/2000 Thu Description: Tool Set

Customer: ARDLAN Job Id:

Price Level: Wholesale Warehouse: GENERAL

Quantity	Inventory	M...	Description	Unit	Amount	T...	G/L Acc...	Cost
4.00	DIRSHD	ea	Dirt Shovel	27.00	108.00	✓	52000-010	84.00
3.00	GARRAK		Garden Rake	48.00	144.00	✓	52000-010	111.00
2.00			Tool Set	257.14	514.28	✓		395.58
1.00	PHISCR6		6' Phillip's Screwdriver	4.99	4.99	✓	52000-010	3.90
2.00	LEVEL3		3' Level	13.50	27.00	✓	52000-010	20.50
1.00	HALWRE	ea	1/2 in Wrench	1.15	1.15	✓	52000-010	0.89
1.00	TBMAIN		Heavy Duty Box	155.00	155.00	✓	52000-010	120.00
1.00	TBTRAY		Main Tool Box Tray	69.00	69.00	✓	52000-010	52.50

Items: 9.000000 Hours: 0.00 Subtotal: \$766.28 Cost: \$590.58 Show Cost

Tax Table: PA Weight: 8.00 Tax: \$45.98 Total: \$812.26 Profit: \$175.70 29.8%

Ready Open

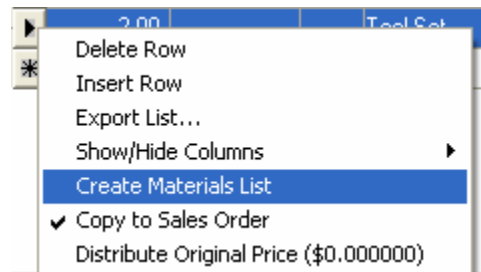
The detail lines of a proposal can be formatted for a variety of purposes as shown below:

A. Standard

The standard line consists of the **Quantity**, **Description**, and pricing. A standard line may contain an **Inventory** item or the description may be manually entered.

B. Heading

A heading line is used to total a materials list of items. Notice the "Tool Set" line in the example shown above. The unit price of a heading line is derived from the total of all the lines within the materials list. A heading line may include an inventory item that is classified as 'No Count' or 'Service'. A heading line cannot contain any **Inventory** items classified as 'Track Count'. A heading line is created by right clicking on the proposal line and selecting the **Create Materials List** option from the context menu.



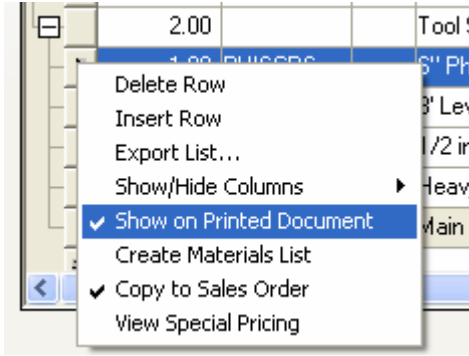
C. Hidden Materials List

A hidden materials list line of a proposal will not show on the printed proposal document. A hidden materials list is useful for informational purposes or to properly process inventory. To create a materials list line, right click on the header line and select the **Create Materials List** option. Press the down arrow button from the last line of the materials list to add to the materials list. Review the Sales > Materials List > Using the Materials List for Sales Contracts section of the main manual for more details on hidden materials lists.

Proposals

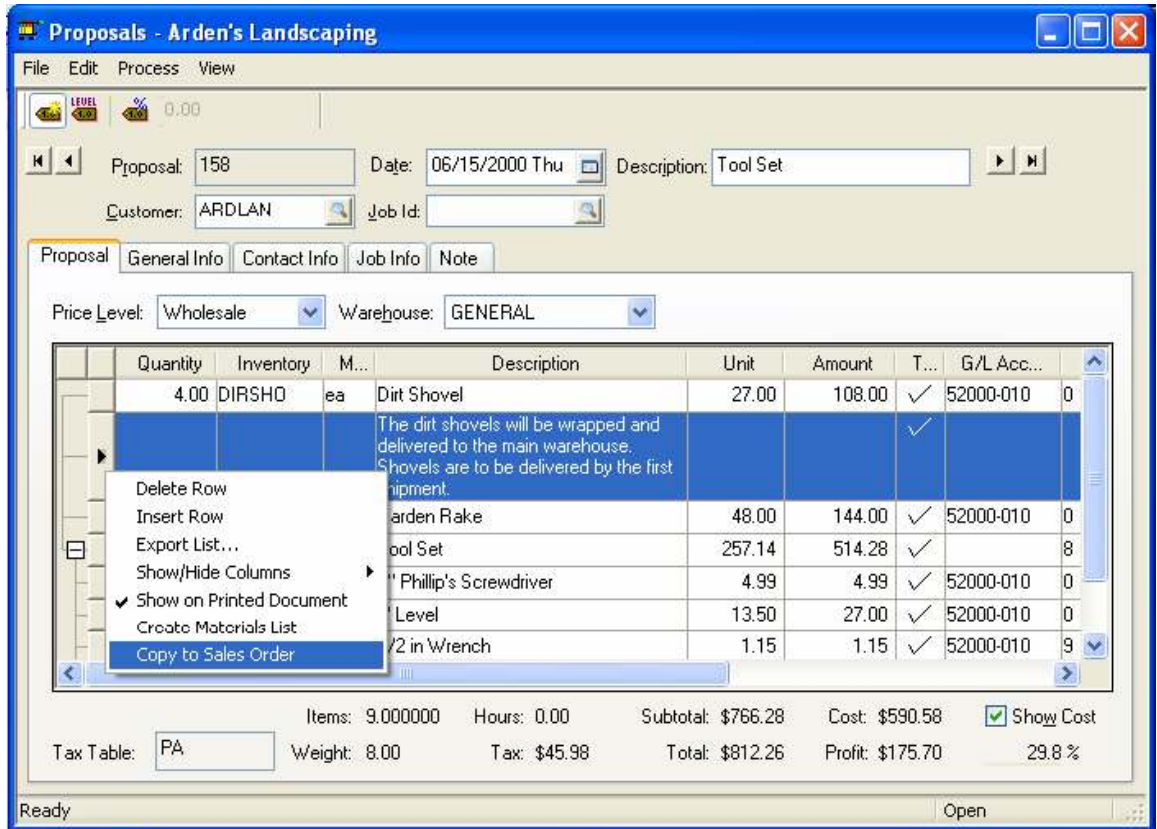
D. Visible Materials List

A visible materials list will show the quantity and description of the individual materials lines but will not show the **Unit** or extended **Amount** on the printed proposal. The prices of all materials lists are totaled on the header line. A visible materials list line is created the same way as the hidden materials list line. Right click on the materials list line and select the **Show on Printed Document** option from the context menu to make the materials list visible.



E. Comment

A line that contains a description with the **Quantity** and **Pricing** columns blank is considered a comment line. A comment line can consist of a single line or multiple paragraphs. A comment can be created for the proposal only and will not be copied to the sales order by clicking on the comment line and disabling the **Copy to Sales Order** option.



A separate line was created for the shipping instructions of the dirt shovel in the example above so that the main line is copied to the sales order and the note is only printed on the proposal.

Click on the **Note** tab to enter a detailed description of the proposal. This single proposal note may print on the proposal document with different margins than the description entered in the **Description** column.

Select **View > Sales Taxes** to change any sales tax settings.

The **Show Cost** option can be disabled to hide **Cost** and **Profit** values on the proposal. This can be useful when the user is creating a proposal in the customer's presence.

Select a proposal report from the **File > Print** menu of the proposal. Review the Reports > Print Button section of the main manual for instructions on adding reports to print menus and buttons.

A proposal can be printed without a document total by enabling the **Do Not Print Totals** option on the print dialog box.

Proposal Pricing

The pricing of each proposal line can be set to derive the price using the **Normal Method**, from the **Price Level**, **Percent Markup**, or **Percent Margin**. The **Pricing Type** can be set by selecting **Edit > Price Calculation** from the menu or by selecting the price calculation from the **Price Tool Bar**. The pricing tool bar is displayed or hidden by selecting **View > Price Tool Bar**.

A. Normal Price Method

The standard price model works the same as the sales invoice. The price is set based on the price level setting on the proposal. The **Normal Price Method** derives the default price from the **Price Level** setting on the proposal heading unless any special pricing settings apply. Special pricing is determined from the optional special pricing feature within the customer account or inventory item.

B. Exclusively from Price Level

The **Price Level** model determines the price using the same method as the **Normal Price Method**, except that all special pricing is ignored. Go to **Inventory > Options > Price Levels** tab to add, rename, or delete price levels. Note that if the **Price Level** setting is changed from one price level to another, the prices do not change for the items currently listed on the proposal. Go to **Inventory > Inventory Items – Pricing** tab to set prices for each inventory item.

C. Percent Markup or Percent Margin 25

The proposal price can be determined based on a percentage markup or margin. The **Markup** or **Margin** option is set by selecting **Inventory > Options** from the main menu. This option allows the user to calculate the price based on the cost of the product instead of a predefined price. This option is often used when a set of items is sold as a unit such as a building kit or a defined mix of components or raw materials. Select the **Percent Markup / Margin** option and enter the percentage amount. For example, if you wish to add a 40% markup to the cost of the new item, enter 40 into the **Percentage** field.

Enable the **Show Cost** option to display the costs for each detail line of the proposal.

Quantity	Inventory	Description	Unit	Amount	T...	G/L Acc...	Cost	% Mark
1.00	PCANSFY20	20 Oz. Can of Spray Paint	2.81	2.81	✓	52000-020	2.25	24.9
3.00	PBRUSH3	3 inch Paint Brush	6.13	18.39	✓	52000-020	14.70	25.1
1.00	PCANSFY10	10 Oz. can of spray paint	1.60	1.60	✓	52000-020	1.28	25.0

The cost value can be entered manually if no inventory item code is used, or if the inventory item is classified as No Count or Service. The **Cost** of a product is updated each time a proposal is reloaded and may change both the cost and markup or margin. For example, if you calculate all the prices at 30% using the **Percent Markup Price Calculation**, save the proposal, and reload the proposal a week later, the costs may have changed. This may cause the Markup/Margin percentages to change.

A price within any proposal line can be manually entered by the user. The price can be set for an entire group of items if the user has grouped items into a materials list. Review the Creating Sets and Assemblies using Materials Lists section for more details in grouping items.

To change the **Price Calculation** for all lines within a proposal, select **Edit > Price Calculation** as shown below:

Select the desired **Price Calculation** and enable the **Apply to all lines** option. Click the **OK** button to recalculate all prices within the proposal. This process will overwrite all previously entered pricing within the proposal.

Proposals

The cost column within the proposal can be set to reflect the **Last Cost** or **Perpetual** cost of the inventory items. The cost setting is selected within the **General Info** tab of the proposal as shown below:

The screenshot displays the 'Proposals - American Retailers' application window. The 'General Info' tab is active, showing the following details:

- Proposal: 160
- Date: 06/15/2000 Thu
- Description: Paint Project
- Customer: AMERET
- Job Id: (empty)
- Salesperson: ADMINISTRATOR
- Proposal is valid for 30 days
- Cost Method: Last Cost (selected), Perpetual
- Approval section: Date, By, Invoice, and Reason for not accepting (all empty)

The perpetual cost method may be either **FIFO (First In First Out)** or **LIFO (Last In First Out)**, based on the option set within the **Inventory > Options > General** tab.

The proposal totals are shown on the bottom of the proposal window. The total **Cost** and **Profit** will also be displayed if the **Show Cost** option is enabled.

Contact Information

The customer contact information for a proposal is entered within the **Contact Info** tab as shown below:

The screenshot shows a software window titled "Proposals - American Retailers" with a menu bar (File, Edit, Process, View) and a toolbar. The main area displays proposal details: Proposal: 160, Date: 06/15/2000 Thu, Description: Paint Project, Customer: AMERET, and Job Id: [blank]. Below this are tabs for Proposal, General Info, Contact Info (selected), Job Info, and Note. The "Contact Info" tab contains two main sections: "Customer Information" and "Contact Information".

Customer Information:

- Name: American Retailers
- Address: PO Box 781
- City: Chads Ford
- State: PA
- Zip: 19871
- Country: USA

Terms:

- Discount: 5 % paid in 5 days
- Due: Net 15 days

Contact Information:

- Phone: (610) 123-1234
- Fax: (610) 123-4321
- E-Mail: Joe@chesco.com
- Contact: Joe Milgrow
- Other: [blank]

Next Contact: 08/16/2000 Wed

An "Open" button is located at the bottom right of the form area.

The **Customer Information**, **Terms**, and **Contact Information** is copied from the customer record when the **Customer ID** is entered within the proposal header. The contact information can be edited by the user, but the data will be overwritten if a new customer ID is entered. The information within the **Contact Info** can be manually entered when the **Customer ID** field is blank.

The **Next Contact** date can be used to prompt the user to make contact with the customer.

Additional **Job Information** can be entered in the **Job Info** tab.

Proposals

Proposals - Arden's Landscaping

File Edit Process View

LEVEL 25.00

Proposal: 160 Date: 06/15/2000 Thu Description: Paint Project

Customer: ARDLAN Job Id: L1298 Change Order

Proposal General Info Contact Info Job Info Note

Name: Main Street Site Job Date: 06/20/2000 Tue

Address: PO Box 190 Apply to progress billing

City: Amway State: PA Zip: 19320

Ready Open

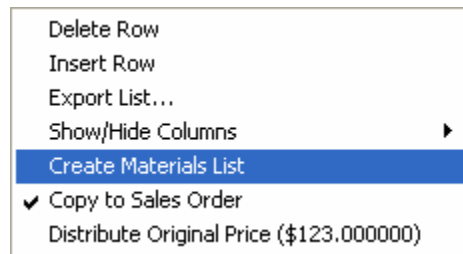
Most of the job information is copied from the **Job Id** record when a **Job Id** is entered. The **Job Id** will only show when the optional job costing module is included. Go to **Help > About EBMS** to view which optional modules are installed.

Proposal Sets and Templates

Creating Sets and Assemblies using Materials Lists

A set of lines can be grouped within a proposal to allow for a set price rather than pricing for individual items. Items can be grouped by using the following steps:

1. Create a new blank quote by selecting **File > New** from the proposal menu.
2. Select **Create new blank proposal** from the new wizard and set the proposal customer ID and description. Complete the information in the header of the proposal.
3. Create a set header by entering a **Quantity** of 1.
4. Do not enter an **Inventory** ID and manually enter the set **description**.
5. Right click on the row button located to the left of the invoice detail line. The row button is a square button that is located to the left of each invoice detail line. The following context menu will appear:



6. Click on the **Create Materials List** option to create a materials list. Enter materials list details as shown below:

Proposals

Proposals - American Retailers

File Edit Process View

Proposal: 164 Date: 06/15/2000 Thu Description: Project Quote

Customer: AMERET Job Id:

Proposal General Info Contact Info Job Info Note

Price Level: Wholesale Warehouse: LOC B

	Quantity	Inventory	Description	Unit	Amount	T...	G/L Acc
	1.00		Garden Set	134.50	134.50	✓	
	1.00	DIRSHO	Dirt Shovel	27.00	27.00	✓	52000-01C
	2.00	GARRAK	Garden Rake	48.00	96.00	✓	52000-01C
	1.00	GARHDS25	25' Garden Hose	11.50	11.50	✓	52000-01C
						✓	

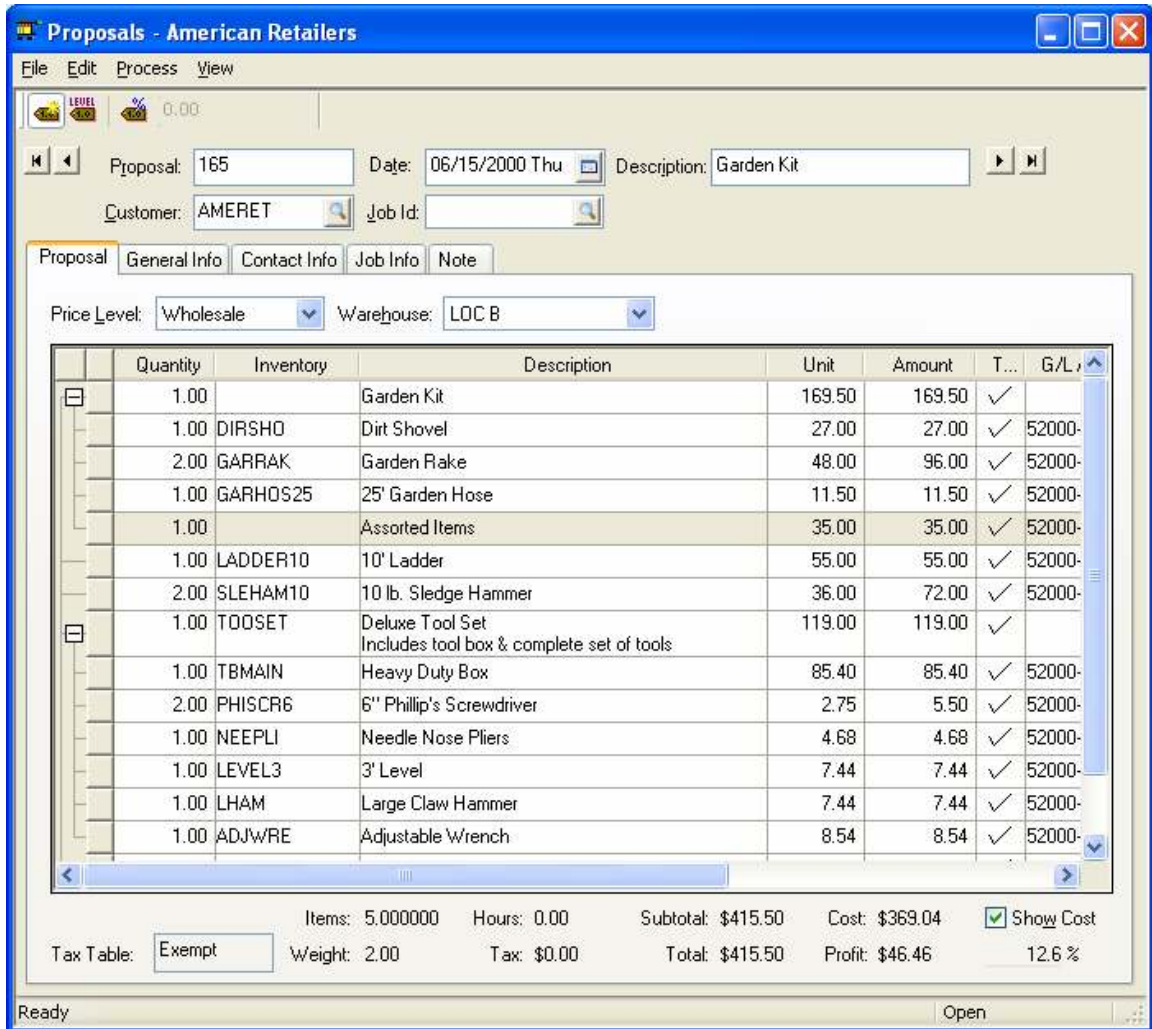
Items: 1.000000 Hours: 0.00 Subtotal: \$134.50 Cost: \$103.89 Show Cost

Tax Table: Exempt Weight: 0.00 Tax: \$0.00 Total: \$134.50 Profit: \$30.61 29.5 %

Ready Open

- Enter the **Quantity** and inventory **Item** code of each component item. Blank the inventory **Item** code to manually enter a description and price rather than using an inventory item.
- Enter any additional information for each detail line.
- A materials list line can be displayed on the printed proposal by right clicking on the row button and selecting the **Show on Printed Document** option from the context menu. The materials list will only show quantities and descriptions of the materials list items since the price is only summarized within the set heading line. The materials list lines that are hidden are shown with a gray background.
- Tab to the next line to enter additional materials list line items. Repeat for each additional materials list line within the set. Hit the down-arrow cursor button on your keyboard within the blank materials list line to complete the materials list and to add additional proposal lines that are not part of the set.

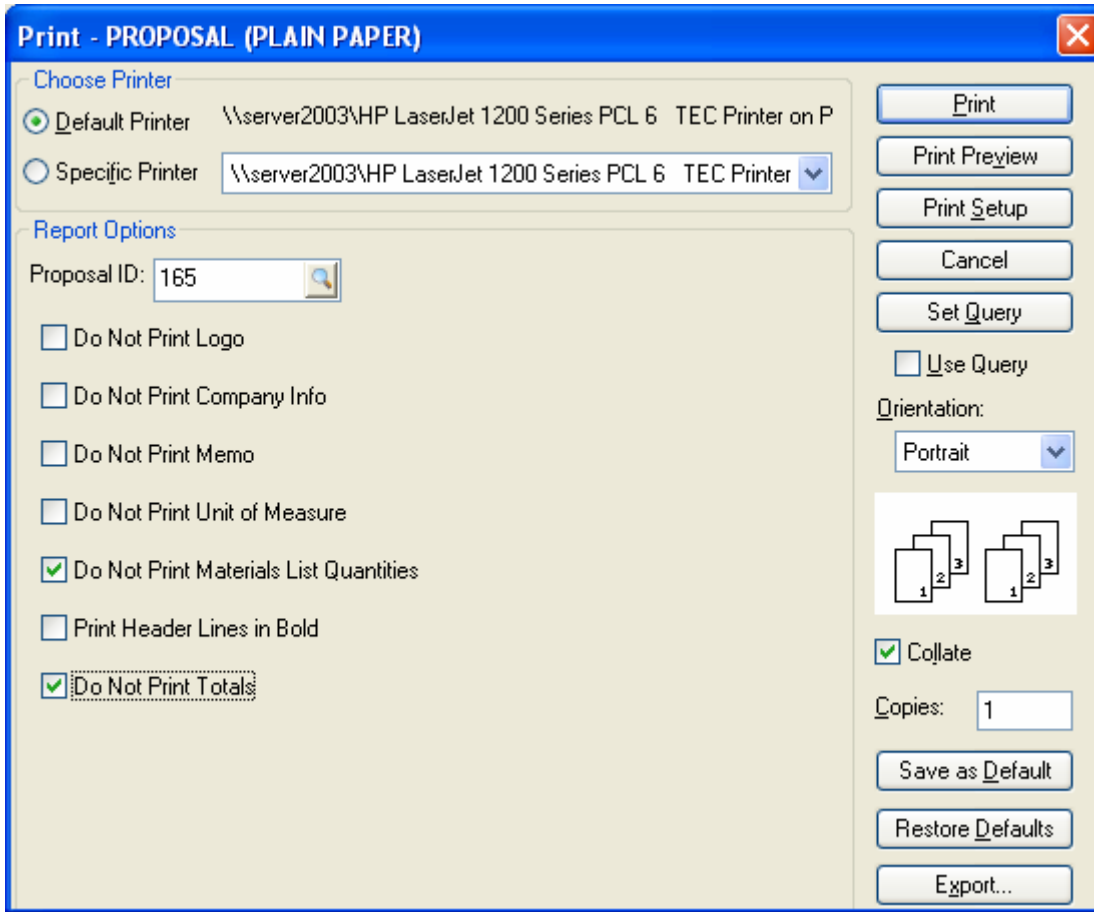
The proposal can consist of multiple sets and/or combinations of individual items, sets, or inventory assemblies containing components as show below:




The example above consists of a manually entered set (Garden Kit) that will list a single price for the Garden Kit. Note that the Assorted Items line will not display anything on the printed document, including the description. The proposal also includes 2 individual items – LADDER10 and SLEHAM10 – as well as an inventory assembly – TOOSET. The Deluxe Tool Set contains multiple components that will be displayed within the proposal.

Review the Inventory >Components section of the main manual for more details on creating inventory items with components.

7. Print the proposal by selecting **File > Print** from the proposal menu.



8. Enable the **Do Not Print Materials List Quantities** to suppress the quantities of all visible materials list lines. Enable the **Do Not Print Totals** to suppress the proposal's grand-totals.

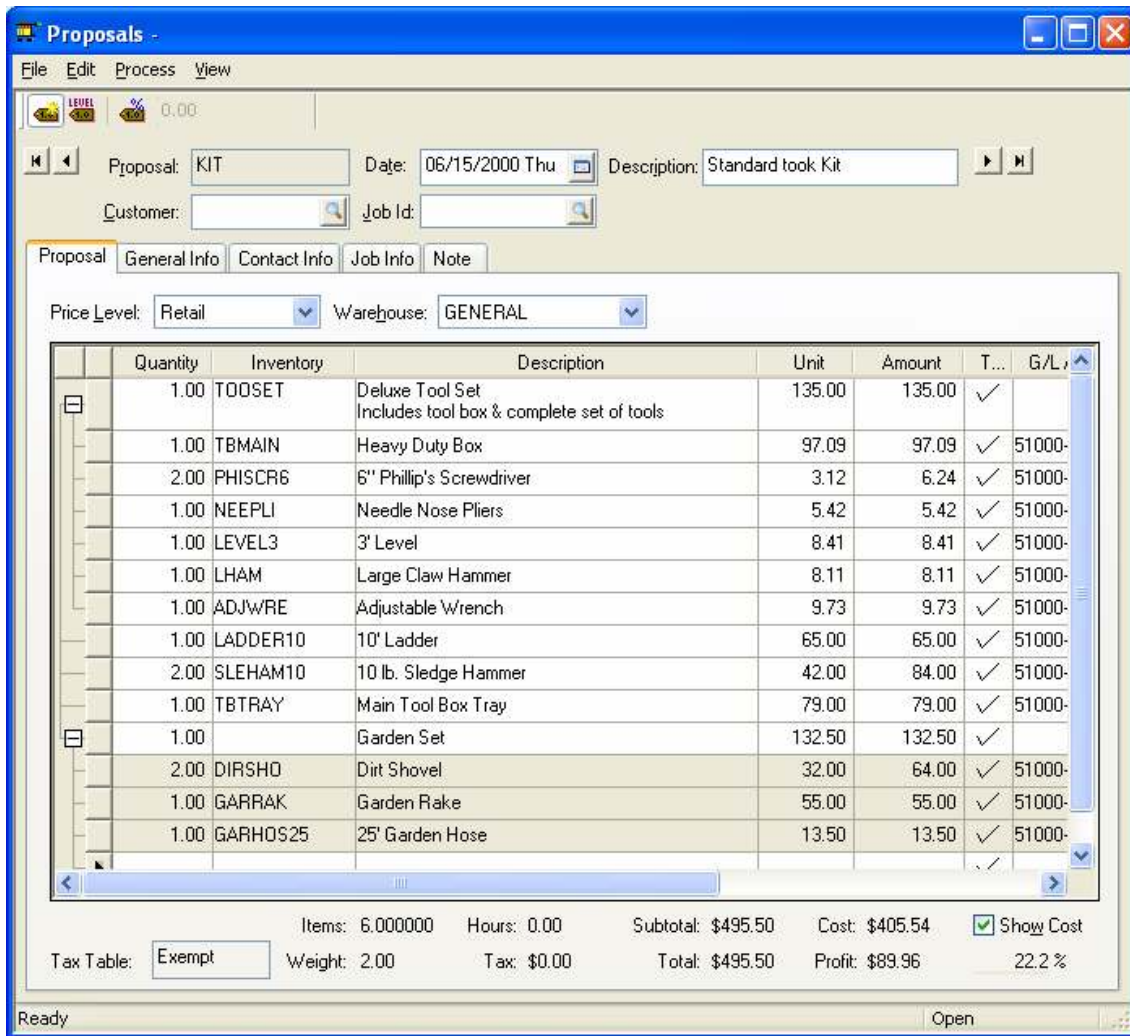
	Quality Hardware (New Demo Data) Main Street P.O. Box 100 Lancaster, PA 17603 Phone: (222) 989-8888 Fax: (222) 989-7979		PROPOSAL								
	Proposal To: American Retailers PO Box 781 Chads Ford, PA 19371		<table border="1"> <tr> <th>Proposal ID</th> <th>Date</th> </tr> <tr> <td>165</td> <td>6/15/2000</td> </tr> <tr> <th>Sales Person</th> <th>Page</th> </tr> <tr> <td>ADMINISTRATOR</td> <td>1 of 1</td> </tr> </table>		Proposal ID	Date	165	6/15/2000	Sales Person	Page	ADMINISTRATOR
Proposal ID	Date										
165	6/15/2000										
Sales Person	Page										
ADMINISTRATOR	1 of 1										
Description: Garden Kit		Phone: (610) 123-1234 Fax: (610) 123-4321 E-Mail: Joe@oleoco.com Contact: Joe Migrow									
Quantity	Item ID	Description	Unit	Amount							
1.00		Garden Kit 1) ea. Dirt Shovel 2) Garden Rake 1) 25' Garden Hose	169.50	169.50							
1.00	LADDER10	10' Ladder	55.00	55.00							
2.00	SLEHAM10	10 lb. Sledge Hammer	36.00	72.00							
1.00	TOOSET	DeKore Tool Set Includes tool box & complete set of tools 1) Heavy Duty Box 2) 6" Phillips Screwdriver 1) Needle Nose Pliers 1) 3' Level 1) Large Claw Hammer 1) Adjustable Wrench	119.00	119.00							

Notice that the pricing is not shown for the materials list lines. The total on the bottom of the proposal is also suppressed because the report prompt was enabled.

Proposal Templates

The proposal module is useful in creating and printing quotes for a customer without creating a sales order, but it is also very useful in creating common inventory sets or assemblies. These predefined proposal sets can then be duplicated and altered when creating a new quote for a customer. Using templates can save a lot of time when different quotes contain a similar list of items. For example, a hardware store may list a set of materials that comprise a common toolbox. By using proposal sets, the hardware store will not need to recreate a new materials list for each toolbox, but can use the standard materials list and make the necessary changes for each customer.

1. To create a proposal containing a set, open the proposal window and enter a standard materials list as shown below:



Identify the **Proposal** template with an ID that is easy to remember, rather than a numeric ID. A proposal is identified as a template when the **Customer ID** is blank. If the **Customer Id** is not left blank, the template can be stored on the **Proposal** tab of the customer account. Review the Customer Specific Product or Price List for more details.

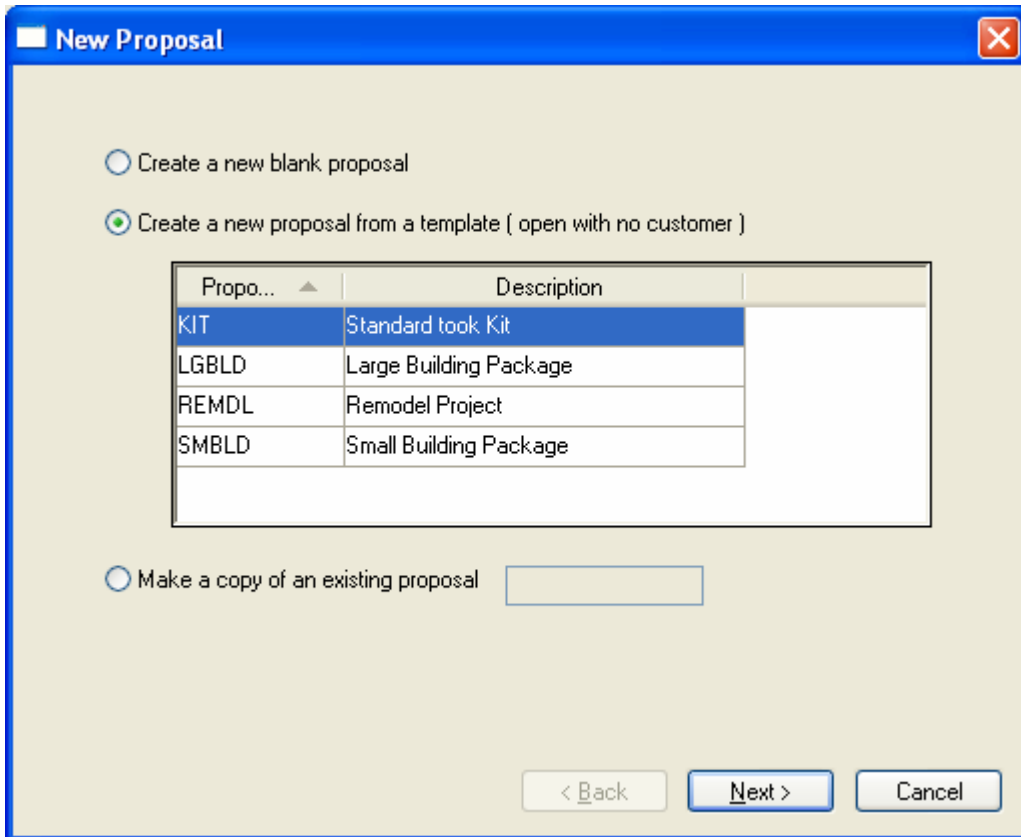
Create a list of standard items, kits, and assemblies to simplify the sales order entry process. Set the standard price calculation settings, line format settings, and copy settings within the template

before copying the template to customer proposals. Review the Creating and Printing Proposals section for details on line format settings and copy settings. Review the Proposal Pricing section for more details on price calculations.

Save the new template.

Complete the following steps to use a template to create a new proposal:

1. Select **File > New** from the proposal menu and select **Create a new proposal from a template** as shown below:



All proposals with a blank **Customer** ID will be listed in the template list.

2. Select the desired template and click the **Next** button.

Proposals

New Proposal

New Reference Number: 163

Customer ID: DOEJOH

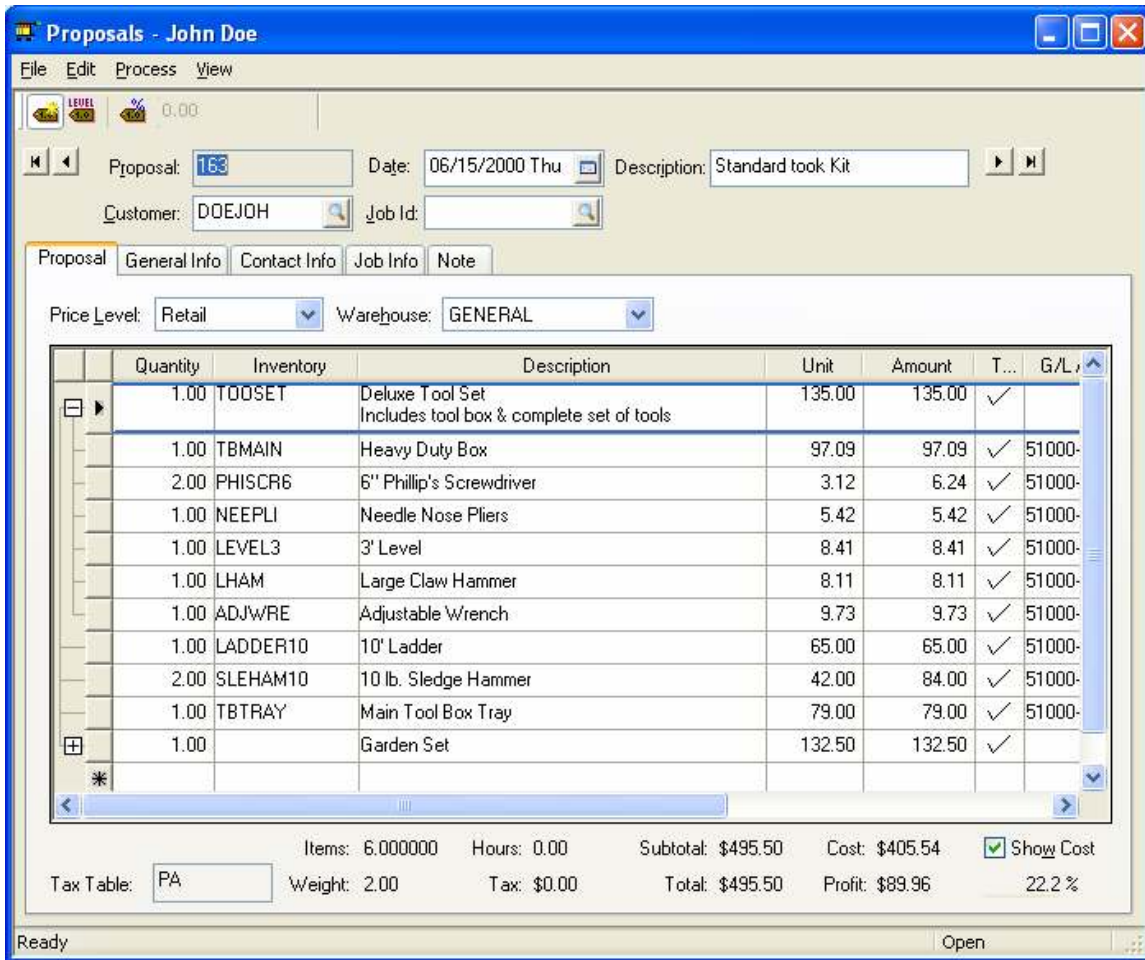
Description: Standard tool Kit

Warehouse: GENERAL

Job Id:

< Back Finish Cancel

3. Select a **Customer ID** for the new proposal. Change the **Description**, if necessary. Click the **Finish** button.



The proposal list can be appended or changed to fit the customer's need.

4. Select **Edit > Recalculate Prices** to update the pricing. All the detail lines set to update from the **Price Level** will be updated and any percentage settings will be recalculated when this step is completed.
5. Save proposal and select **File > Print** to print a proposal for the customer.
6. Select **Process > Create Sales Order** to create a sales order from the quote. Continue with the Creating a Sales Order from a Proposal section for more details.

Customer Specific Product or Price List

The proposal module within the EBMS software system can be used to establish and maintain individual customer product lists. This feature is useful when the order entry process is expedited by using a product list of a hundred items or less that are regularly purchased by the customer. Review the Proposal Templates for more information. This predefined product list can be used as a customer-specific price list or an order sheet. For example, B & G Retailers – WHODIS purchases the listed ten items on a regular basis.

Quantity	Inventory	Description	Unit	Amount	T...	G/L Ac...	Cost
2.00	GARHDS25	25' Garden Hose	11.50	23.00	✓	52000-010	17.78
	DIRSHD	Dirt Shovel	27.00		✓	52000-010	
3.00	GARRAK	Garden Rake	48.00	144.00	✓	52000-010	111.00
	TRABIN30	30 Gallon Trash Bin	33.00		✓	52000-010	
4.00	LADDER10	10' Ladder	55.00	220.00	✓	52000-010	168.00
	WHEBAR	Wheelbarrow	49.00		✓	52000-010	
1.00	EXTCOR50	50' Extension Cord	29.00	29.00	✓	52000-010	22.50
1.00	HEDTRI	Hedge Trimmers	89.00	89.00	✓	52000-010	70.00
	STICHA	Stihl Chainsaw	425.00		✓	52000-010	
1.00	TOOSET	Deluxe Tool Set Includes tool box & complete set of tools	119.00	119.00	✓		167.15
1.00	TBMAIN	Heavy Duty Box	85.40	85.40	✓	52000-010	120.00
2.00	PHISCR6	6" Phillip's Screwdriver	2.75	5.50	✓	52000-010	7.80
1.00	NEEPLI	Needle Nose Pliers	4.68	4.68	✓	52000-010	6.60
1.00	LEVEL3	3' Level	7.44	7.44	✓	52000-010	10.25
1.00	LHAM	Large Claw Hammer	7.44	7.44	✓	52000-010	10.50
1.00	ADJWRE	Adjustable Wrench	8.54	8.54	✓	52000-010	12.00

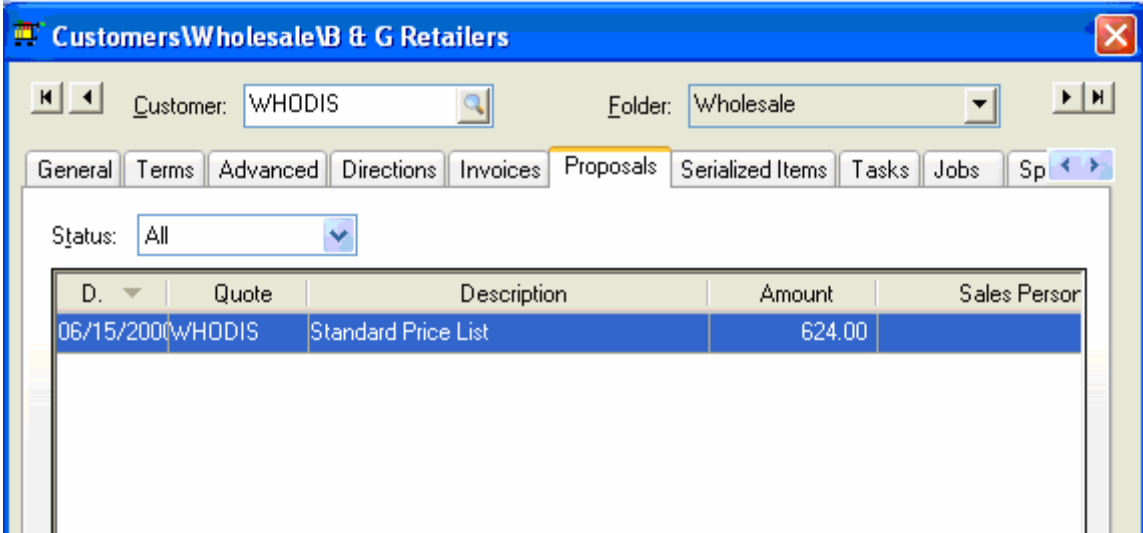
Items: 12.000000 Hours: 0.00 Subtotal: \$624.00 Cost: \$556.43 Show Cost
 Tax Table: Exempt Weight: 2.00 Tax: \$0.00 Total: \$624.00 Profit: \$67.57 12.1 %

The items that are purchased by the customer must be manually added to or removed from the proposal. The price calculation setting should be set for each item on the list. Review the Proposal Pricing section for more details about setting the price calculation setting.

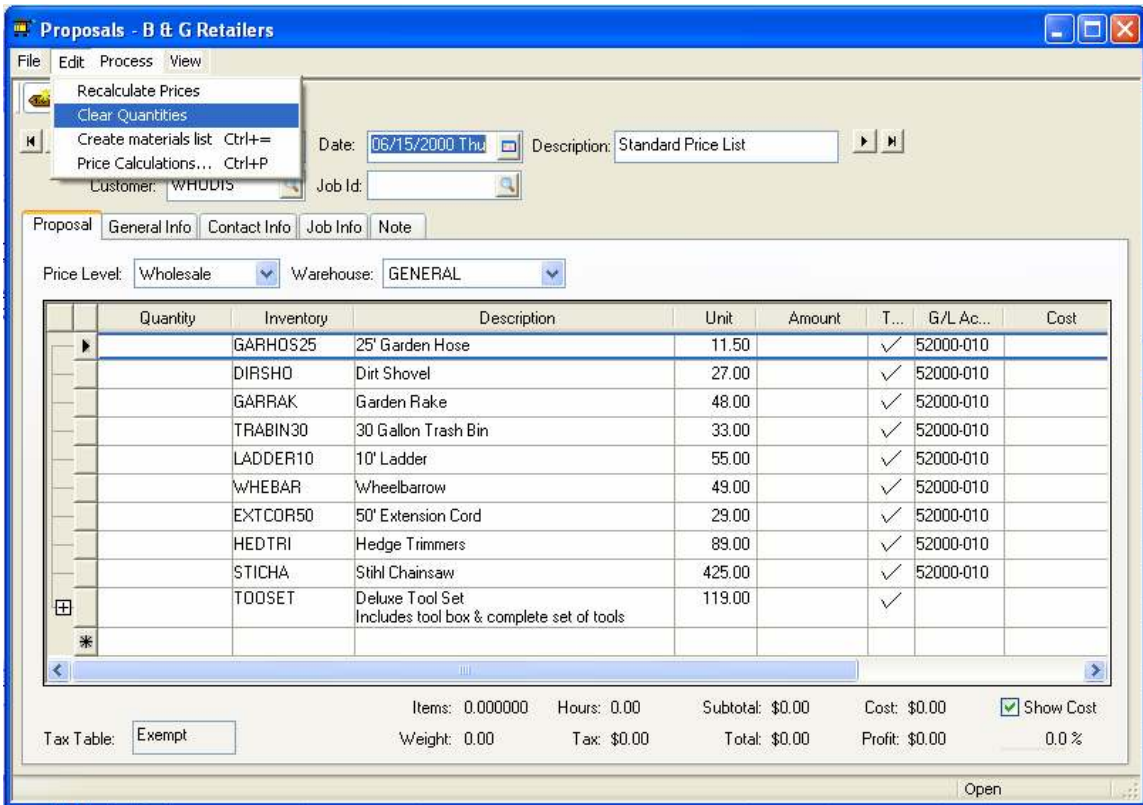
Print the product list by using the Customer Order Sheet report.

Complete the following steps to create a sales order from the customer product list:

1. Open the account for the customer who wants to place an order. Click on the proposal tab as shown below:



2. Double click on price list proposal to open list.
3. Click on the **Edit** menu of the proposal and click the **Clear Quantities** to clear the quantities from the past order.



4. Click on the **Recalculate Prices** option on the **Edit** menu to update the proposal list to the most recent prices. Note that the prices within the proposal will not update without using this option. Do not activate this option if the customer price sheet contains contact prices for the customer. The **Recalculate Prices** option must also be used to update prices if the **Price Level** is changed on the proposal.

Proposals

5. Enter the order quantities for each item that is being ordered by the customer.

Quantity	Inventory	Description	Unit	Amount	T...	G/L Ac...	Cost
5.00	GARHOS25	25' Garden Hose	11.50	57.50	✓	52000-010	44.45
	DIRSHD	Dirt Shovel	27.00		✓	52000-010	
	GARRAK	Garden Rake	48.00		✓	52000-010	
10.00	TRABIN30	30 Gallon Trash Bin	33.00	330.00	✓	52000-010	257.50
	LADDER10	10' Ladder	55.00		✓	52000-010	
4.00	WHEBAR	Wheelbarrow	49.00	196.00	✓	52000-010	157.20
	EXTCOR50	50' Extension Cord	29.00		✓	52000-010	
	HEDTRI	Hedge Trimmers	89.00		✓	52000-010	
2.00	STICHA	Stihl Chainsaw	425.00	850.00	✓	52000-010	660.00
1.00	TOOSET	Deluxe Tool Set Includes tool box & complete set of tools	215.98	215.98	✓		167.15

6. Select the **Create Sales Order** option from the **Process** menu of the proposal to create a sales order from the product list.

This will create a sales order from the items on this proposal. Please set the following options.

Copy Proposal Note To Sales Order

Do not create invoice lines for items that have a zero quantity.

Accept Proposal

< Back Finish Cancel

7. The **Do not create invoice lines...** option should be enabled. This will cause only ordered items from the product list to be copied to the sales order.
8. The **Accept Proposal** option should be disabled so the proposal is not closed.

9. Click the **Finish** button to create the sales order. Click **Yes** on the **Do you want to view the invoice now** dialog to view the new sales order. The order can be appended to an existing sales order if desired.

Processing Proposals

Creating a Sales Order

A sales order can be created from a proposal, within EBMS, after a customer has approved the purchase. This will allocate the inventory needed to complete the order. Review the Inventory > Tracking Inventory Counts > Inventory Item Count section of the main manual for more details on allocating inventory. If the optional job costing module has been installed, review the Use Proposals in Job Costing section before proceeding.

1. Load an existing proposal from the customer tab or from the **Sales > Proposals** selection of the EBMS menu.

The screenshot shows the 'Proposals - Arden's Landscaping' window. The 'Proposal' tab is active, showing details for Proposal 158, dated 06/15/2000, for customer ARDLAN. The description is 'Tool Set'. The price level is 'Wholesale' and the warehouse is 'GENERAL'. A table lists the items in the proposal:

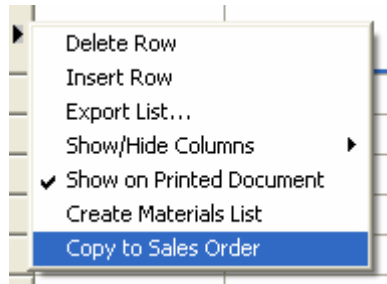
Quantity	Inventory	Description	Unit	Amount	T...	G/L Ac...	Cost
4.00	DIRSHD	Dirt Shovel	27.00	108.00	✓	52000-010	84.00
		The dirt shovels will be wrapped and delivered to the main warehouse. Shovels are to be delivered by the first shipment.			✓		
3.00	GARRAK	Garden Rake	48.00	144.00	✓	52000-010	111.00
2.00		Tool Set	257.14	514.28	✓		395.58
1.00	PHISCR6	6" Phillip's Screwdriver	4.99	4.99	✓	52000-010	3.90
2.00	LEVEL3	3' Level	13.50	27.00	✓	52000-010	20.50
1.00	HALWRE	1/2 in Wrench	1.15	1.15	✓	52000-010	0.89
1.00	TBMAIN	Heavy Duty Box	155.00	155.00	✓	52000-010	120.00
1.00	TBTRAY	Main Tool Box Tray	69.00	69.00	✓	52000-010	52.50

Summary statistics at the bottom of the window:

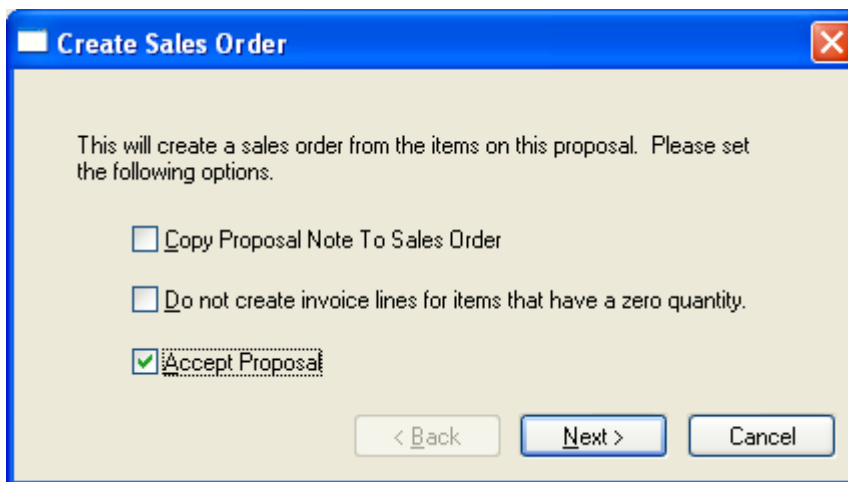
Items: 9.000000	Hours: 0.00	Subtotal: \$766.28	Cost: \$590.58	<input checked="" type="checkbox"/> Show Cost
Tax Table: PA	Weight: 8.00	Tax: \$45.98	Total: \$812.26	Profit: \$175.70
				29.8 %

2. Make any necessary changes to the proposal. Review the following detail line settings to verify that the information is properly copied to the sales order.
 - Comment lines - Any detail line that does not contain quantities or pricing can be configured to NOT be copied to the sales order. Right click on the detail line to set the **Copy to Sales Order** option.

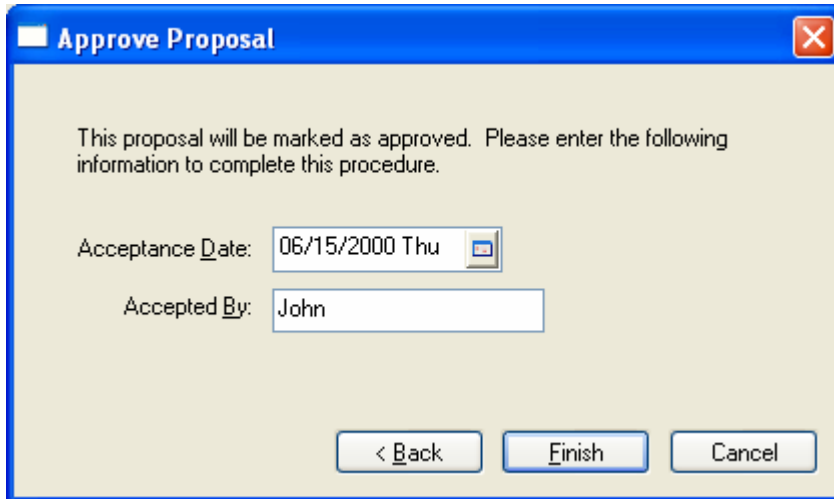
Proposals



- The **Show on Printed Document** setting for each line will be copied to the sales order detail line.
3. Select the **Create Sales Order** option from the **Process** menu of the proposal. The **Process > Create Sales Order** option is disabled if a job is attached to the proposal and the **Apply to Progress Billing** switch within the **Job Info** tab is enabled. Review the main Job Costing manual for more details on job costing and proposals.



- a. Enable the **Copy Proposal Note To Sales Order** option to copy the information found within the proposal **Note** tab to the sales order note.
- b. Enable the **Do not create invoice lines for items that have a zero quantity** option if lines within the proposal with zero quantity should be ignored. Note that items with pricing but no quantity will not be copied to the sales order with this option enabled.
- c. The **Accept Proposal** option should be enabled unless the proposal status should be kept open. Review the Proposal Status Settings section for more details about closing a proposal. Click the **Next** button.



Approve Proposal

This proposal will be marked as approved. Please enter the following information to complete this procedure.

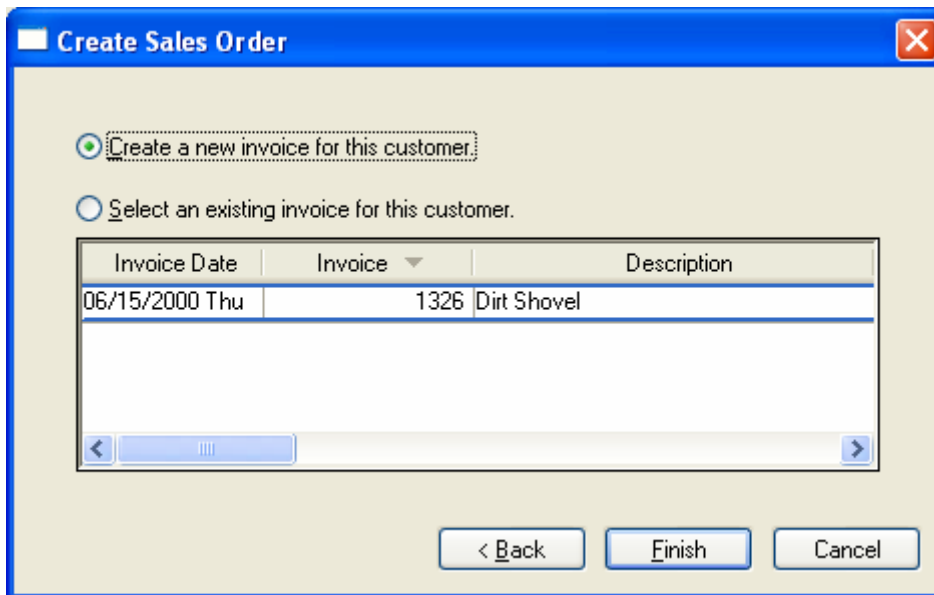
Acceptance Date: 06/15/2000 Thu

Accepted By: John

< Back Finish Cancel

4. Enter the **Acceptance Date** and enter the name of the person that approved the proposal into the **Accepted By** field. Click the **Finish** button to continue.

The following dialog box will appear if a sales order already exists for the customer:



Create Sales Order

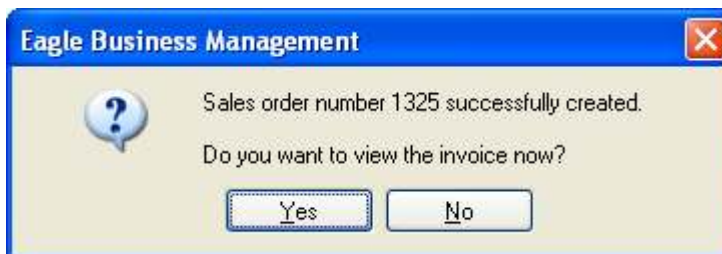
Create a new invoice for this customer.

Select an existing invoice for this customer.

Invoice Date	Invoice	Description
06/15/2000 Thu	1326	Dirt Shovel

< Back Finish Cancel

5. Select an existing sales order from the list or select the **Create a new invoice for this customer** option to create a new sales order/invoice. Click the **Finish** button to create the sales order.



Eagle Business Management

?

Sales order number 1325 successfully created.

Do you want to view the invoice now?

Yes No

Proposals

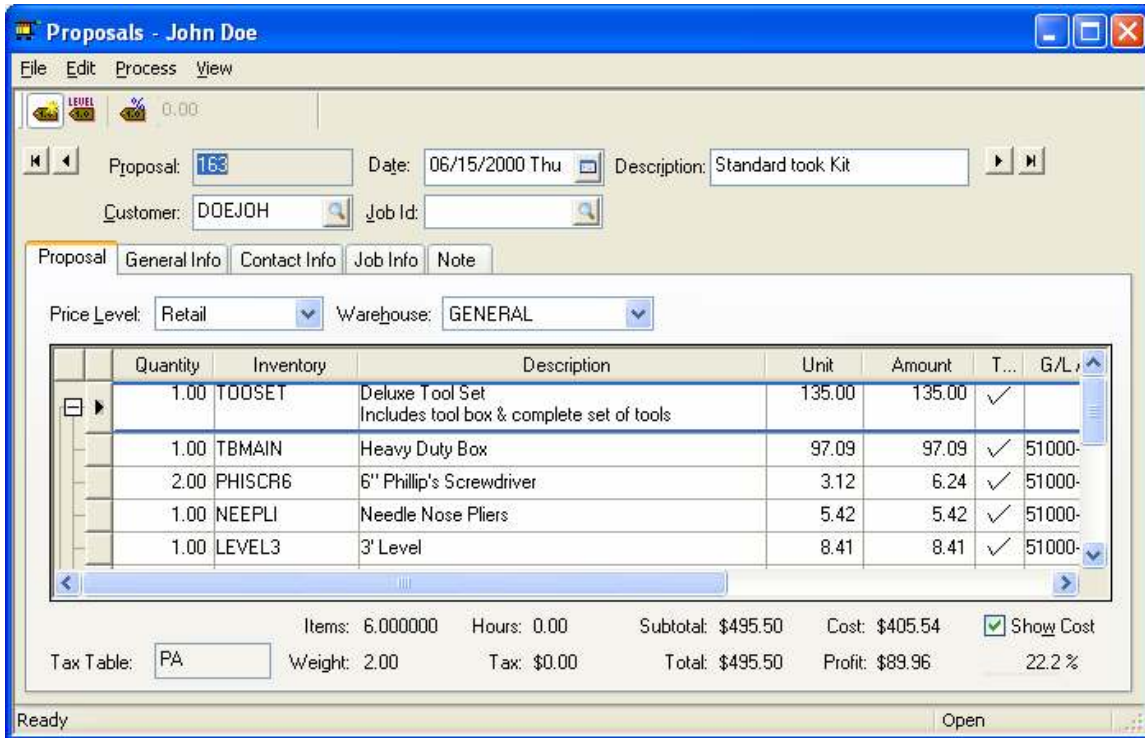
6. Click **Yes** to view the sales order or **No** to continue without viewing the new sales order/invoice.

The content of a sales order can be deleted and the proposal recopied if the content is not correct. The proposal can be re-copied to a new sales order if it is re-opened. Review the Proposal Status Settings section for more details on re-opening a closed proposal.

A sales order should not be created from the proposal in some situations if the optional job costing module is installed. Review the Use Proposals in Job Costing for alternative ways to allocate inventory with the job costing module.

Proposal Status Settings

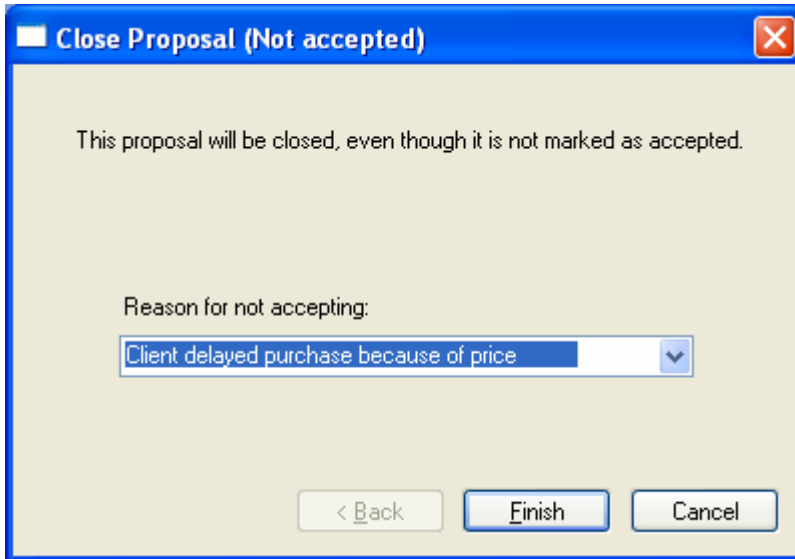
The status of a new proposal is set as **Open** when it is first created. The proposal can be changed from **Open** to either **Accepted** or **Not Accepted**. You will find the status of a proposal on the lower left-hand corner of the proposal window as shown below:



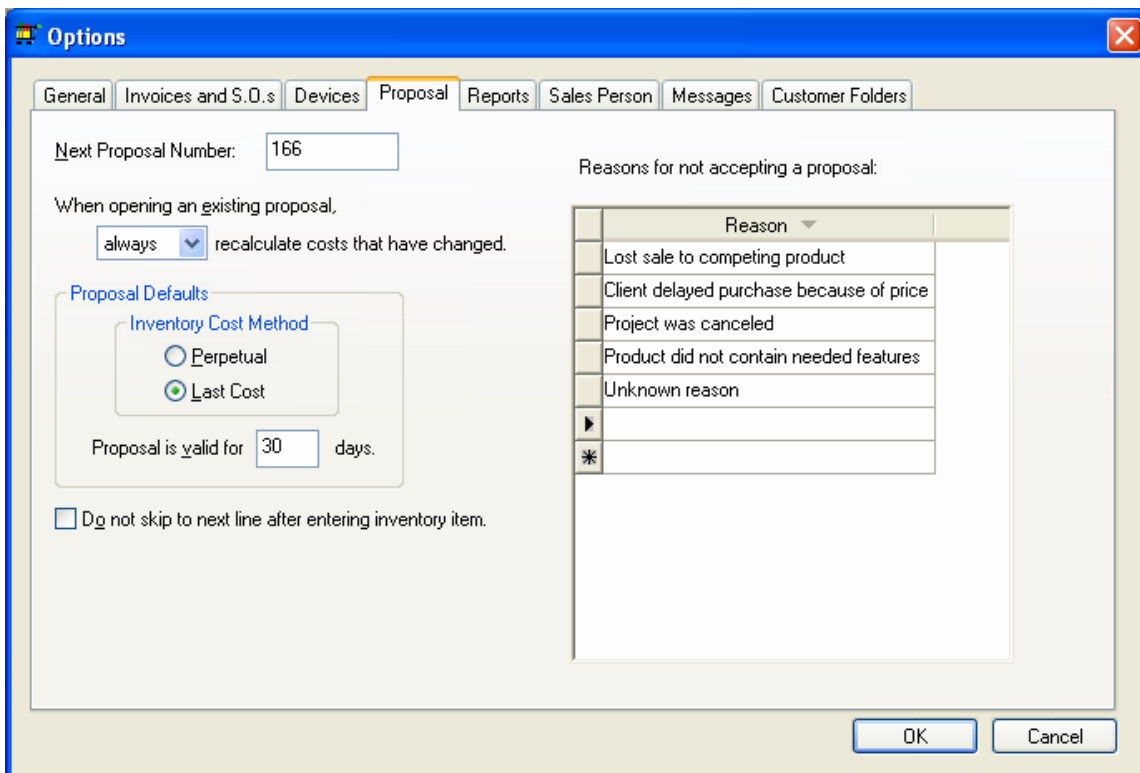
A proposal is set as **Accepted** when the **Apply to Job** (Job Costing only), **Create Sales Order**, or **Create Inventory Transfer Ticket** (Job Costing only) wizards are activated from the **Process** menu of the proposal. Review the Creating a Sales Order from a Proposal section for more details on the **Create Sales Order** option. Review the Use Proposals in Job Costing section for more details on the **Apply to Job** and the **Create Inventory Transfer Ticket** options.

The proposal status can be changed from **Open** to **Not Accepted** to indicate that a proposal is closed but has not been accepted. This normally indicates that a proposal did not develop into a sale but was lost. Click on **Process > Close (Not Accepted)** to close a proposal and change the status to **Not Accepted**. The following wizard will be activated:

Proposals

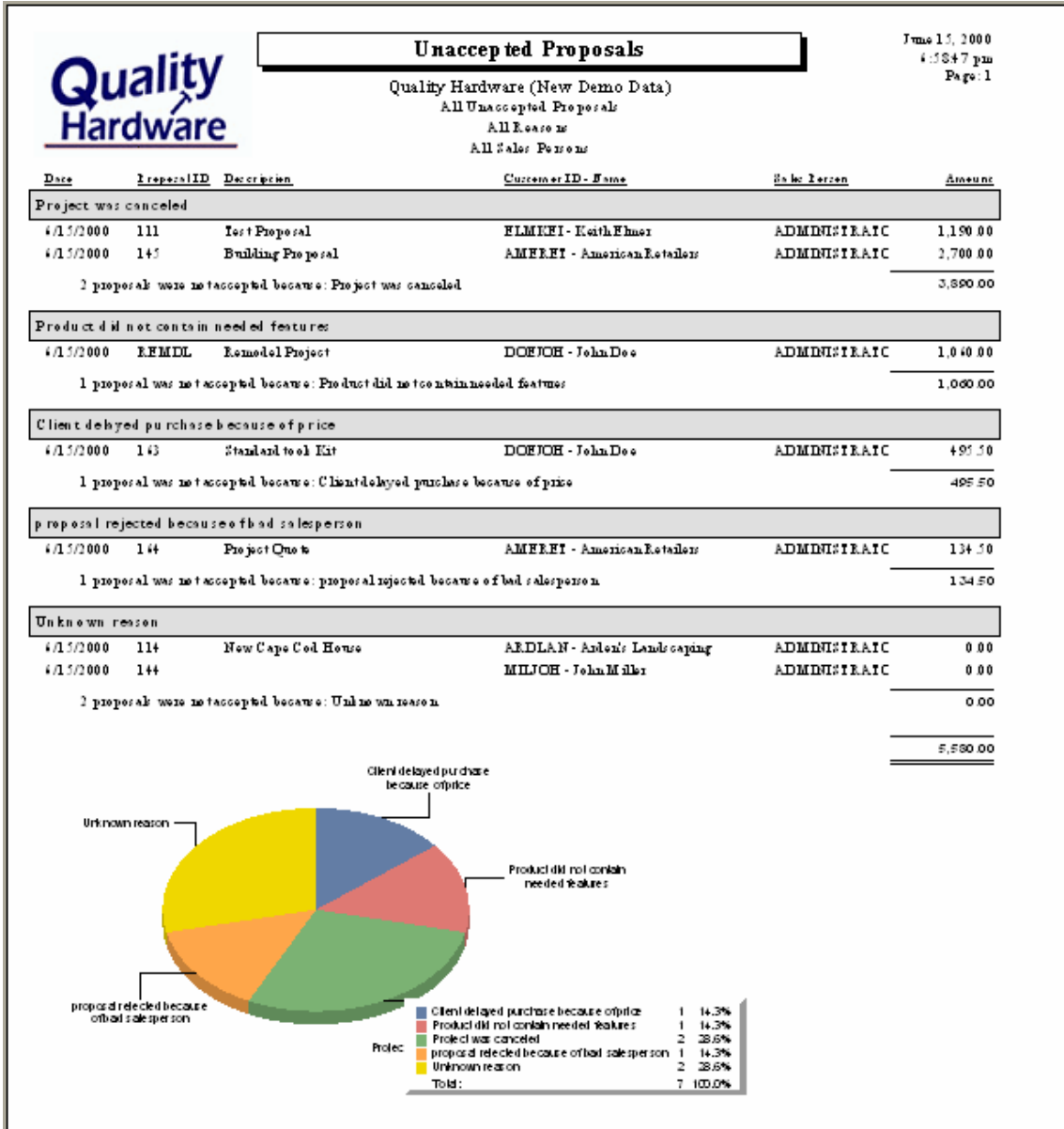


Select an optional **Reason for not accepting** since the proposal was rejected. This allows the user to analyze rejected proposals based on the reason. The user can manually enter a new reason into the entry field and this reason will be recorded within the reason list. Click the **Finish** button to complete the close process. The reason list is accessed from the main menu by clicking **Sales > Options – Proposal** tab as shown below:



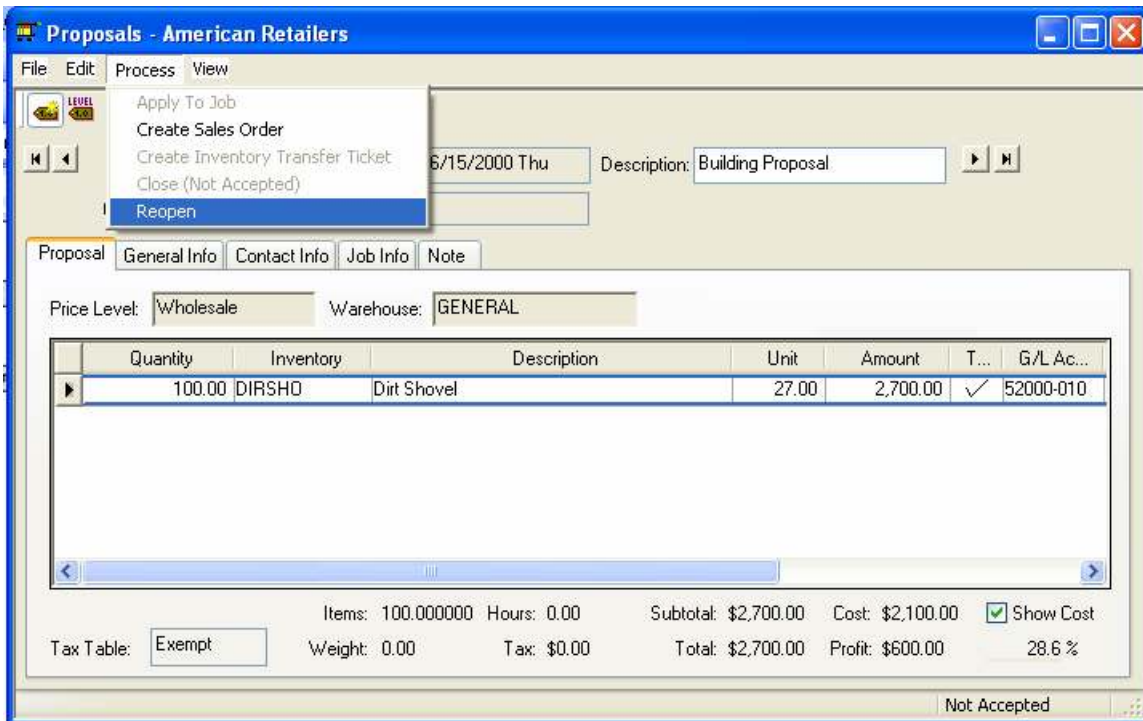
The reason list can be edited from this proposal options window. Click **OK** to save.

The proposal status is only used for reporting and management reasons since a proposal does not create any G/L transactions. Go to the **Reports > Sales > Proposals** folder and print the **Unaccepted Proposal Report** report as shown below:



A closed proposal (proposal that is marked **Accepted** or **Not Accepted**) can be reopened by clicking on **Process > Reopen** as shown below:

Proposals



This process will reopen the proposal which allows the user to accept or not accept the proposal.

Use Proposals in Job Costing

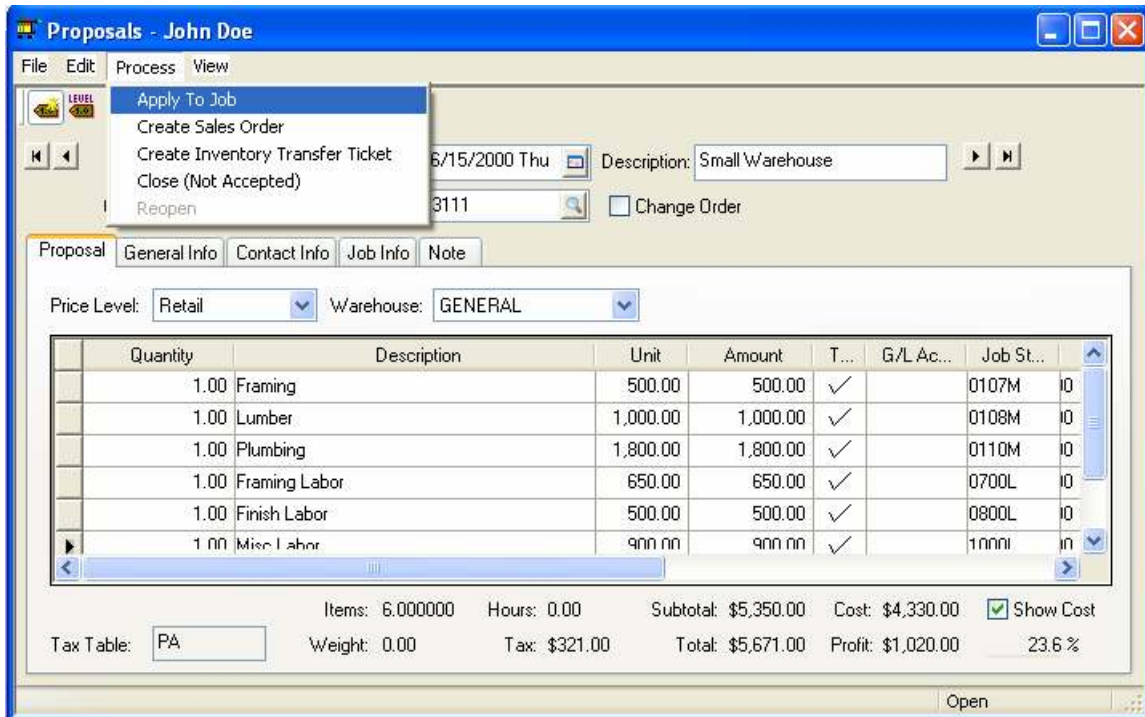
The proposal window is an integral part of the Job Costing module. The budgeted costs and income are recorded within the proposal window and applied to the job. Enter a **Job ID** into the proposal to apply a budget (proposal) to a job. Note that the **Customer ID** within the proposal must match the **Customer Id** within the job. Select **Process > Apply to Job** option from the proposal menu to apply the values to a job. Review the Jobs > Entering a New Proposal or Job Budget section of the Job Costing manual for more details.

Enable the **Change Order** option to the right of the **Job Id** if the proposal is a change order rather than the initial quotation. Review the Jobs > Creating Change Orders section of the Job Costing manual for more details. The job information recorded within the **Job Info** tab is defaulted from the **Site** tab of the job.

Enable the **Apply to progress billing** if the proposal updates the progress billing. Review the Progress Billings > Entering Billing Items for a Progress Billing Invoice section of the Job Costing manual for more details.

The **Process** menu of a proposal contains two additional options if the proposal is attached to a job as shown below:

Proposals



The **Apply to Job** option is used to apply the values within the proposal to a job. The budget and billing values are not posted to a job till this option is selected.

The **Create Sales Order** option is available if the job does not **Apply to progress billing**. The **Apply to progress billing** option can be viewed within the **Job Info** tab of the proposal.

The **Create Inventory Transfer Ticket** is available if a job is attached to a proposal. Review the Job Costs > Creating Inventory Transfer from a Proposal section of the Job Costing manual for more details.

Review the Job Costing manual for complete details of the optional job costing module.

Index

A

About EBMS	16
Accept	31
Acceptance Date	31
Enter	31
Accepted By	31
Additional Job Information	16
Amount	7
Amount compared	13
Apply	13, 31, 34, 38
Enable	13, 38
Job	34
Job option	38
Progress Billing	31
Assemblies using Materials Lists	19
Assorted Items	19

B

Budgets	2
Creating	2

C

Calculate button	13
Change	2, 7, 13, 23
New Reference Number	23
Unit	13
Complete Toolbox	7
Components	2, 13, 19
Contact Info	2, 16
Contact Information	2, 16
Contain	2, 7, 13, 19, 23
Cost Method	2
Contain customer-specific	2
Copy	7
disabling	7
Enable	31
Cost	2, 7, 13, 16, 31, 34, 38
Cost Method	2, 13
contains	2
Create Inventory Transfer Ticket	34, 38
Create Inventory Transfer Ticket options	34
Creating	2, 7, 19, 23
Budgets	2
Select	7
Use	7
Creating and Printing Proposals	2, 7
Creating Personalized Customer Lists or Sets	27
Creating Predefined Proposal Sets	23
Creating Sets and Assemblies	19
Customer accepts	2

proposal	2
Customer account	13
Customer ID	2, 7, 16, 19, 23, 38
Customer Information	16
Customer Name	2
Customer Specific Product	27
Customers	2, 7, 13, 16, 19, 23, 27, 31, 38
print quotes	23
Customer's Id	2, 7, 23, 38
Blank	23
Enter	23
Customer-specific	27
Customer-specific list	2
Customer-Specific Product	2

D

Defaults	2, 7, 13, 38
Next Reference Number	7
Deluxe Tool	19
Description	2, 7, 23
Detail line	7, 13, 31
proposal	7, 13
set	31
Details	2, 7, 13, 19, 23, 27, 31, 34, 38
Details window	7
Disabling	7
Copy	7

E

EBMS	2
EBMS customer	2
EBMS menu	31
Edit	13
selecting	13
Edit menu	27
proposal	27
Enable	7, 13, 31, 38
Apply	13, 38
Copy	31
Do	31
Enter	38
Acceptance Date	31
Job ID	38
EXEMPT	7

F

Features	2, 13, 27
FIFO	2, 13
File	
selecting	19
Finish button	7, 23, 27, 31, 34
First In First Out	13

Proposals

G

G/L	34
G/L Account	7
General Info	2, 13
General Tab	2, 13

H

Heading line	7, 19
Heading type	7
Help	16

I

ID2, 23	
Inventory	2, 7, 13, 19, 23, 31, 34, 38
Inventory Cost Method	2
Inventory ID	7, 19, 23
Inventory Item window	13
Inventory Items	2, 7, 13, 19
Inventory Sets	13, 23
Invoice	2, 7, 19, 23, 27, 31
type	7, 23
Use	7
Invoice lines	31
Invoice Number	2

J

Job	34, 38
Apply	34
part	38
Review	38
Job Costing	2, 38
Job Date	2
Job Id	2, 16
Job ID	38
Enter	38
right	38
Job Info	2, 16, 31, 38
Job option	38
Apply	38

L

Last Cost	2, 13
set	2
Last In First Out	13
LIFO	2, 13
Lookup	2
Lookup button	2

M

Margin	2, 7, 13
Margin pricing	13
Markup	2, 13, 23
Markup/Margin	7, 13
Materials List	7, 13, 19, 23
Materials list line	7, 19
proposal	7

Measure	7
Unit	7

N

New	19, 23
New button	7, 23
New Reference Number	7, 23
Change	23
Next button	23, 31
Next Contact	2, 16
prompt	2
Next Reference Number	7
defaults	7
No Count	7, 13
Normal Method	13
Normal Price Method	13

O

OK button	13
Option allows	13
Options	2, 7, 13, 19, 27, 31, 34
Order Sheet	27
Order/invoice	31
Ordered	2, 7, 27, 31, 38

P

Part	38
Job	38
Percent	13
Select	13
Percent Margin	13
Percent Markup Price Calculation	13
Percentage	13, 23
Perpetual	2, 13
set	2, 13
Perpetual Inventory	2
Price Calculation	13
Price Level	7, 13, 23, 27
Price Lists	2, 27
Price Model	7, 13
Set	13
Price Model settings	7, 13
Price model works	13
Price Tool Bar	13
Pricing	7, 13, 19
Garden Kit	19
Pricing Type	13
Print	2, 7, 19, 23, 27, 31, 34
Print Button	7, 23
Print quotes	23
customer	23
Printed Document option	7, 19
Printing quotes	23
Process	31, 34
Process menu	27, 31, 34, 38
proposal	27, 31, 34

Profit	7, 13
Progress Billing.....	31
Apply	31
Prompt	2
Next Contact	2
Proposal Date	2
Proposal heading.....	13
Proposal ID	2
Proposal identifies	23
Proposal listing	2
Proposal Note	2, 7, 31
Proposal Pricing.....	13
Proposal Status Settings	34
Proposal Templates	2, 23
Proposals 2, 7, 13, 16, 19, 23, 27, 31, 34, 38	
customer accepts.....	2
detail line	13
detail lines	7
Edit menu	27
materials list line	7
Process menu	27, 31, 34
Proposals Overview.....	2
Purchase.....	2, 27, 31
customer wishes	2
Q	
Quantity	7, 19, 23, 27, 31
Enter.....	7, 23
R	
Recalculate Prices	23, 27
Recalculate Prices option	27
Reopen	34
Reports	34
Review	38
Job	38
Right	
Job Id	38
S	
Sales	31
Sales Invoice	2, 13, 23
Sales menu.....	2
Sales Order.....	2, 7, 23, 27, 31, 34, 38
Sales Tax.....	7
See	7
Sales Tax Rates	7
Sales Tax Yable.....	7
Select.....	7, 13, 19
Create	7
Edit	13
File	19
Make	7
Percent.....	13
Show	7, 19
View.....	13
Select Create	19
Select Edit.....	23
Select File	7, 23
Select Process	23, 38
Select View	7
Service	7, 13
Set.....	2, 7, 13, 19, 23, 31
detail line	31
Last Cost	2
Perpetual.....	2, 13
Price Model	13
Tax Table	7
Type	23
Set prices	13, 19
Sets and/or.....	19
Settings	2, 7, 13, 23, 31, 34
Show	7, 19
select.....	7, 19
Unit	7
Show Cost.....	7, 13, 23
Turn	23
Show on Printed Document setting	31
Standard pricing.....	23
Standard Proposal - The.....	2
T	
Tax.....	7
Tax Table	7
set.....	7
Tax Yable.....	7
Taxable	7
Technical Support.....	1
Terms	2, 16
The Proposal window	2
Totals	7
Track Count	7, 13
Type	2, 7, 13, 23
Header.....	23
Invoice	7, 23
U	
Unaccepted Proposal Report.....	34
Unit Price	7, 13, 23
Use Price Level.....	13
Use Proposals.....	38
Use Proposals in Job Costing.....	38
V	
View	13
selecting	13
W	
Warehouse.....	7