Design Projects 2 – Participant

Thank you for enrolling in Design Projects 2 for Studio Designer. Please feel free to ask questions as they arise. If we start running short on time, we may hold off on some of them and have a 5-10 minute session available after the class to answer any questions.
We ask you to be considerate of others, so please do NOT use a speaker phone at any time during the class. Although it sounds fine to those using the speaker, the static is multiplied many times to all other participants. You can have as many people as you like call into the conference number to listen in. Also, please mute your phones whenever possible to cut down on background noise.

This is Design Projects 2

We'll cover how to do the following:

- Effective use of Projects
- Use lists and alternate views to access information quickly
- Hide costs
- Use keyboard functions to copy and paste
- Find and replace
- Void Purchase Orders and Invoices
- Manually change Proposal #'s
- Add to existing Purchase Orders
- Use Proposal descriptions and Invoice references
- Printing progress proposals using percent complete
- Duplicate items and entire projects

This class assumes that you are comfortable with the design items process. Most of the functions that we will cover today are going to be independent of the others, so you will want to take notes.

Using Projects

Projects can be generic like "Phase 1" or "Phase 2" that you use for any or all clients, or they can be specific to Clients, where they would represent specific homes like "Beach House" or projects within a home like "07BsmtRem". Any way that you choose to use them, Projects give you the ability to group client items.

- Important considerations when you choose to use projects:
  - **Sales Taxes come from the project whenever one is used.**
    - This is very good when you use projects that are specific to a client because the tax rate can reflect where the goods are being shipped which may be different than the main client.
    - This can be bad if you use generic projects because the sales tax on the project overrides the sales tax from the main client.
  - When printing reports, you can select by client and project, but by default, you can't get just items with no client. Because of this, we always **recommend that if you choose to use projects, that you make it a rule that you ALWAYS use projects.**
- Create a new project in the Address list
  - Generic projects have no "Client for Project" filled in and can be used for ANY client
  - Client specific project have the client's Address ID in the "Client for Project" and can only be used for that client
- Enter the Project ID into the Design Projects screen so the Project is automatically entered into new items as they are created
  - **Always enter the Project ID under the Client ID in the cash receipts screen**
    - If money is included for more than one project, enter the amounts for each project separately
      - Result of not entering the project when receiving funds:

Client Deposit Balances			
Client=Smith Project=None	Recd = $5000.00	Applied = $0	Balance = $5000.00
Client=Smith Project=Beach	Recd = $0	Applied = $5000.00	Balance = -$5000.00

Alternate ways to access information – Item details can be edited from the lists just like they can from within Design Projects

- Design Projects
  - List (F9) is the default. Must click View to edit and see details
  - Preview (F10) Allows edits directly to the list and allows the user to see all details without opening the item.
  - Budget (F11) Shows item quantity, budget unit and budget total from the list. Scroll to the right to see Budget and Selling Cost totals side by side.
  - View and filter through all items for all clients.

- Proposals
  - Convenient for locating items by Proposal #.
  - Can "find" by proposal description.
  - Quick access directly to proposal reports.

- Orders
  - Convenient for locating items by PO#, Client PO, Vendor Invoice and Mfg Order#s.
  - Expediting information can be added quickly for the entire PO, or for each item by clicking Expediting.
  - Quick access directly to Purchase Order reports.
  - Click PO Check Vouchers to bypass Enter and Print Checks.

- Invoices
  - Convenient for locating items by Invoice #.
  - Can "find" by reference.
  - Quick access directly to Invoice reports.

- View Client receipts / Vendor payments
  - Click Payments from within the item to see receipts/payments for that item.
  - Click Client Payments from within the Proposal or Invoice to see all payments for that Proposal or Invoice.
  - Click Vendor Payments from within the PO to see all payments for that Purchase Order.

Using Keyboard Functions and Shortcut Keys – Most Windows short cut keys will work with Studio Designer. Some require at least 1 full version of any Microsoft Office program (Like Word or Excel).

- Can only replace in Preview mode or from within the item. When using Find, change Look In to Design Projects to search the entire screen
  - Ctrl+Insert – Add a new item
  - Ctrl+Delete- Delete current item
  - Ctrl+End – Move to the last item in the list
  - Ctrl+Home – Move to the first item in the list
  - Ctrl+C – Copy
  - Ctrl+F – Find
  - Ctrl+H – Replace
  - Ctrl+V – Paste
  - Ctrl+X – Cut
  - Ctrl+Z – Undo (Only works for the last change, can also use Esc if you haven't pressed enter yet.)
  - F2 – Edit
  - F4 – Open the current list
  - F5 – Open the current item
  - F7 – Spell Check
  - F8 – Select
  - F10 - Selects the file menu

Hide / Show costs

- From within the item click Hide Costs to hide the purchase cost then click the button again (now Show Costs) to view the purchase cost.

- Show Costs in Employee Security defines if the cost is automatically hidden and View Costs allows the user to click Show Costs to make the purchase cost visible.

- This is very convenient if desks are located in public places where clients may be able to see the computer screen when orders are being created.

Changing Proposals, Purchase Orders and Invoices

- **Proposals**
  - Proposals are very flexible and can be changed very easily until the items have been placed on Purchase Orders or Invoices.
  - Proposal #'s can be changed at any time by opening the items and typing into the Proposal #.
  - The only way to "void" a Proposal is to remove the Proposal # from the individual items.
  - Description, accessible from within the Proposal allows you to create an overall description or summary about all of the items on the proposal. Only shows up on printed proposals if customized, but can be used in Find and Replace searches.
  - **Progress** Proposals can be easily updated by using the % Complete at the bottom of the Proposal.
    - % Complete updates the deposit amount requested for all items on a proposal. For example, if you as for 25% at the start of your project, you would enter 25 when you print the proposal for the first time for the client. The proposal will look something like this:

Proposal Total:	$1000.00
Deposit Requested:	$250.00
Deposit Received:	$0.00
Deposit Due:	$250.00

    - When it's time to ask for the next 25%, enter 50 in % Complete and now you get this:

Proposal Total:	$1000.00
Deposit Requested:	$500.00
Deposit Received:	$250.00
Deposit Due:	$250.00

- **Purchase Orders**
  - A Purchase Order can generally be changed at any time.
    - The only things that cannot be changed are:
      - The Vendor. The PO must be voided, the vendor changed on the item and a new PO be created.
      - Purchase sales tax cannot be changed once the item has been invoiced.
      - Specifier cannot be changed once the item has been invoiced.
      - The Client cannot be changed on the main PO, but it can be changed on the item up until the item has been invoiced. The PO will continue to show the Client that the PO was originally created for.
  - A Purchase Order can be voided at any time as long as all vendor payments = 0.00.
    - Click Void at the top of the screen.
  - Items with the same Vendor can be added to an existing PO at any time.
    - Open the Payments tab from within the item that you would like to add to an existing PO.
    - Enter the PO # and click Add to PO. This is especially convenient for credits.

- **Invoices**
  - Invoices are generally considered “set in stone”.
    - The only things that **can** be changed are:
      - **Invoice Reference**. This is a general use field that can be used to describe the entire invoice. (If you want this to show on your invoices, a customization is required since this field was added after the original reports were created).
        - It’s commonly used for Time Billing invoices to state the time frame that the invoice covers.
      - Special Instructions – Notes to the client that show up on the Invoice.
      - Notes – Notes about the invoice that **do not** show on the invoice and are for internal use.
- If changes are needed to an invoice, it must be voided and recreated after all changes have been completed on the items.
  - Payments ($ applied to the item **after** the item was created) must = 0.00 for an invoice to be voided.
  - “Payments” can only be viewed by scrolling to the right at the bottom of the screen within the Enter Cash Receipts screen.
  - Reference, Special Instructions and Notes stay in place when an invoice is voided and it’s a good idea to use one of these places to state the reason for voiding the invoice and possibly to reference the replacement invoice # when applicable.

Important Note: Proposal, PO and Invoice #’s never go away. Once they have been used, they cannot be removed from the list. Although you can add new items to a Proposal or a PO, you can never re-use an invoice#. Try to get into the habit of using “preview” before creating final copies.

Duplicating Items and Entire Projects

- Items can be duplicated for many reasons, creating credits, items with slight differences, etc.
  - Duplicate an individual item by clicking Duplicate from within the Item.
  - Copy an entire project or selection of items by using Copy from within the Design Projects screen.
    - Narrow your selected items by Client, Project, Room and/or Priority
    - Very convenient for :
      - Models
      - Hotels
      - Standard budgets