

Proposal Layout Screen

Select to return
to the sales
manager

Edit room name

View details of
proposal

Copy current
proposal

Copy treatment

Edit treatment

Delete
treatment

Create Client Proposal

Job Location: 1 Newb Street Newbie
Contact Person: Mrs Newbie Newb
Supplier: [Dropdown]
Customer Reference: test
Options: test

Notes for Proposal: [Text Area]

Inc. Room: Ballroom
Windows: [Add Window]

Qty	Retail (inc GST)	Discount	Total Retail (inc GST)
1.00	\$184.30	\$0.00	\$184.30
1.00	\$26.98	\$0.00	\$26.98
	\$211.28	\$0.00	\$211.28

Expand to show
details

Installation Wizard

What If Wizard

Re-cost (Update proposal
with current costs)

View
Client
Proposal

View Margin Report

Gross Retail	\$ 211.28
Discount	\$ -10.56
Total Retail	\$ 200.72

Cancel

Save

Accept/Create
Order

Beginning the Proposal- Adding a Room

Click on the **"Add A Room"** Button on the left hand side

Create Client Proposal

Job Location: 12 school lane | Contact Person: Ms Tricia Tawiri | Supplier: N/A

Customer Reference: testing 123 | Options: testing 123

Inc.	Room	Windows	Qty	Retail (inc GST)	Discount	Total Retail (inc GST)
			No rooms on proposal	\$0.00	\$0.00	\$0.00

Proposal Tools

- Add Room
- What if...
- Re-Order
- View Margin Report
- View Client Proposal

Gross Retail: \$ 0.00
Discount: \$ 0.00
Total Retail: \$ 0.00

Buttons: Cancel, Save, Create Order

Enter Room Details (ie: Bedroom 1) and click **"OK"**

Room?

Buttons: OK, Cancel

This will then bring up the screen that has "Design Wizard" on it.

Please see Help Guide using the Design Wizard to add treatments to the Rooms

****Tip****

Sorting of Rooms and Windows Alphabetically

Rather than the edited or new line going to the bottom of the list it now sorts alphabetically.

This allows you to manage the order of the rooms and windows, also allow you to insert a window or room into a list.

We suggest you start all room and window descriptions with a numbered character ie

1 Bedroom

- 1 left
- 2 Middle
- 3 Right

2 Bedroom

- 1 left
- 2 Middle
- 3 Right

This will allows you to insert a room or Window by adding a 1.1 etc

Create Client Proposal

Job Location12 school lane

Contact PersonMs Tricia Tawiri

SupplierN/A

St Manager

Customer Referencetesting 123

SaveDetails Report

Notes for Proposal

Options testing 123

Inc.	Room Windows	Qty	Retail (inc GST)	Discount	Total Retail (inc GST)
	Bedroom 1 - add window				
✓	Window 2 - Track Only	1.00	\$99.35	\$0.00	\$99.35
✓	Window 6 - Blind V2	1.00	\$332.00	\$0.00	\$332.00
	Bedroom 3 - add window				
✓	Window 7 - Roman Blind	1.00	\$516.80	\$0.00	\$516.80
	Lounge - add window				
✓	Window 3 - Curtain and Track	1.00	\$686.43	\$0.00	\$686.43
✓	Installation	1.00	\$278.53	\$0.00	\$278.53
	<div>Add Room</div>		\$1,913.11	\$0.00	\$1,913.11

Proposal Tools

Installation

What if...

Re-Cost

View Margin Report

View Client Proposal

Gross Retail\$ 1,913.11

Discount\$ 0.00

Total Retail\$ 1,913.11

Cancel

Save

Create Order

Adding Installation to a Proposal

Installation 1-

If you need to add installation hit the pink installation box

Create Client Proposal

Job Location: 12 school lane Contact Person: Ms Tricia Tawiri Supplier: N/A

Customer Reference: testing 123 Options: testing 123

Room	Windows	Qty	Retail (inc GST)	Discount
Bedroom 1	Window 2 - Track Only	1.00	\$99.35	\$0.00
Bedroom 1	Window 6 - Blind V2	1.00	\$332.00	\$0.00
Lounge	Window 3 - Curtain and Track	1.00	\$686.43	\$0.00
			\$1,117.78	\$0.00

Proposal Tools

- Installation
- Whatif..
- Re-Cost
- View Margin Report
- View Client Proposal

Priscounter

Margin: 41.19545
Total Retail: 1,117.78

☒ use slider
Set Discount: 0%

Update

The installation wizard will pop up, you need to go through and select all of the drop down boxes. Put in any miscellaneous charges i.e. Travel and select save

Client Proposal

Installation Wizard

Rate Type	Supplier	Qty Calc	Qty Charge	UOM	Rate Retail	Qty Wind	Total
Blinds							
Bedroom 1	Austro Venetian 25mm New	0 M	1			x1	
Window 6 blind		1 Ea					\$0.00
Tracks/Curtains							
Bedroom 1	MiniExcel Mini Track	5 M	1			x1	
Window 2 track		1 Ea					
Lounge	Bi pleat - ALTO CHINO	4.8 M	4.8			x1	
Window 3 curtain		1.83 D					
Lounge	SheerTrack M System Single 50mm Bracket	2.0 M	1			x1	
Window 3 track		1 Ea					\$0.00
Miscellaneous							
Add Miscellaneous Charge							\$0.00
							\$0.00

Cancel Save

Installation 2-

This will now show up on your proposal along with your two curtain and tracks and your blind

Create Client Proposal

Job Location12 school lane

Contact PersonMs Tricia Tawiri

SupplierN/A

St. Manager

Customer Referencetesting 123

Save

Print Report

Notes for Proposal

Optionstesting 123

Inc.	Room	Qty	Retail (inc GST)	Discount	Total Retail (inc GST)
Windows					
Bedroom 1					
	Window 2 - Track Only	1.00	\$99.35	\$0.00	\$99.35
	Window 6 - Blind V2	1.00	\$332.00	\$0.00	\$332.00
Lounge					
	Window 3 - Curtain and Track	1.00	\$686.43	\$0.00	\$686.43
	Installation	1.00	\$278.53	\$0.00	\$278.53
			\$1,396.31	\$0.00	\$1,396.31

Proposal Tools

Installation

What if...

Re-Quote

View Margin Report

View Client Proposal

Gross Retail\$ 1,396.31

Discount\$ 0.00

Total Retail\$ 1,396.31

Cancel

Save

Create Order

Using Proposal Tools

Copying and Editing Treatments-

Select the **Copy icon** beside the proposal you have selected

Create Client Proposal

Job Location: 12 school lane | Contact Person: Ms Tricia Tawiri | Supplier: N/A
S. Manager: | Customer Reference: testing 123 | Save | Details Report
Notes for Proposal: | Options: testing 123

Inc.	Room	Windows	Swap Fabric	Qty	Retail (inc GST)	Discount	Total Retail (inc GST)
3		add window					
✓	3 - Roman Blind			1.00	\$911.95	\$0.00	\$911.95
✓	Bedroom 1	add window					
✓	Window 2 - Track Only			1.00	\$99.35	\$0.00	\$99.35
✓	Window 2 - Curtain Only			1.00	\$3,477.60	\$0.00	\$3,477.60
✓	Window 6 - Blind V2			1.00	\$332.00	\$0.00	\$332.00
✓	Bedroom 3	add window					
✓	Window 7 - Roman Blind			1.00	\$516.80	\$0.00	\$516.80
✓	Laundry	add window					
✓	Window 1 - Blind V2			1.00	\$450.80	\$0.00	\$450.80
✓	Lounge	add window					
✓	Window 3 - Curtain and Track			1.00	\$686.43	\$0.00	\$686.43
✓	Window 3 - Track Only			1.00	\$91.41	\$0.00	\$91.41
✓	Installation			1.00	\$278.53	\$0.00	\$278.53
					\$6,844.87	\$0.00	\$6,844.87

Proposal Tools: Installation, What if, Re-Cost

Gross Retail \$ 6,844.87
Discount \$ 0.00
Total Retail \$ 6,844.87

Cancel Save Create Order

To **edit** a proposal click on the pencil

Create Client Proposal

Job Location: 12 school lane | Contact Person: Ms Tricia Tawiri | Supplier: N/A
S. Manager: | Customer Reference: testing 123 | Save | Details Report
Notes for Proposal: | Options: testing 123

Inc.	Room	Windows	Swap Fabric	Qty	Retail (inc GST)	Discount	Total Retail (inc GST)
3		add window					
✓	3 - Roman Blind			1.00	\$911.95	\$0.00	\$911.95
✓	Bedroom 1	add window					
✓	Window 2 - Track Only			1.00	\$99.35	\$0.00	\$99.35
✓	Window 2 - Curtain Only			1.00	\$3,477.60	\$0.00	\$3,477.60
✓	Window 6 - Blind V2			1.00	\$332.00	\$0.00	\$332.00
✓	Bedroom 3	add window					
✓	Window 7 - Roman Blind			1.00	\$516.80	\$0.00	\$516.80
✓	Laundry	add window					
✓	Window 1 - Blind V2			1.00	\$450.80	\$0.00	\$450.80
✓	Lounge	add window					
✓	Window 3 - Curtain and Track			1.00	\$686.43	\$0.00	\$686.43
✓	Window 3 - Track Only			1.00	\$91.41	\$0.00	\$91.41
✓	Installation			1.00	\$278.53	\$0.00	\$278.53
					\$6,844.87	\$0.00	\$6,844.87

Proposal Tools: Installation, What if, Re-Cost

Gross Retail \$ 6,844.87
Discount \$ 0.00
Total Retail \$ 6,844.87

Cancel Save Create Order

Then click **Ok**

Customer Referencetesting 123

SaveDetails Report

Optionstesting 123

	Qty	Retail (inc GST)	Discount
		1.95	\$0.00
		9.35	\$0.00
		7.60	\$0.00
	1.00	\$332.00	\$0.00
	1.00	\$516.80	\$0.00
	1.00	\$450.80	\$0.00
	1.00	\$686.43	\$0.00
	1.00	\$91.41	\$0.00
	1.00	\$278.53	\$0.00
		\$6,844.87	\$0.00
			Gross Retail Discount

Please note, some pricing adjustment may occur.

OKCancel

Now you can make any changes and the **save to proposal**

Adding discount to a treatment item-

To discount each individual product you can press the small plus sign, this will show up a drop down box where you can discount each item separately.

For example on this proposal we are giving a discount of 10% off the blind only. Select from the drop down box if you are giving a dollar amount off the blind or a percentage. Then put in the amount of the discount and hit enter. This will change the total retail price of the blind.

Create Client Proposal

Job Location: 12 school lane Contact Person: Ms Tricia Tawini Supplier: N/A

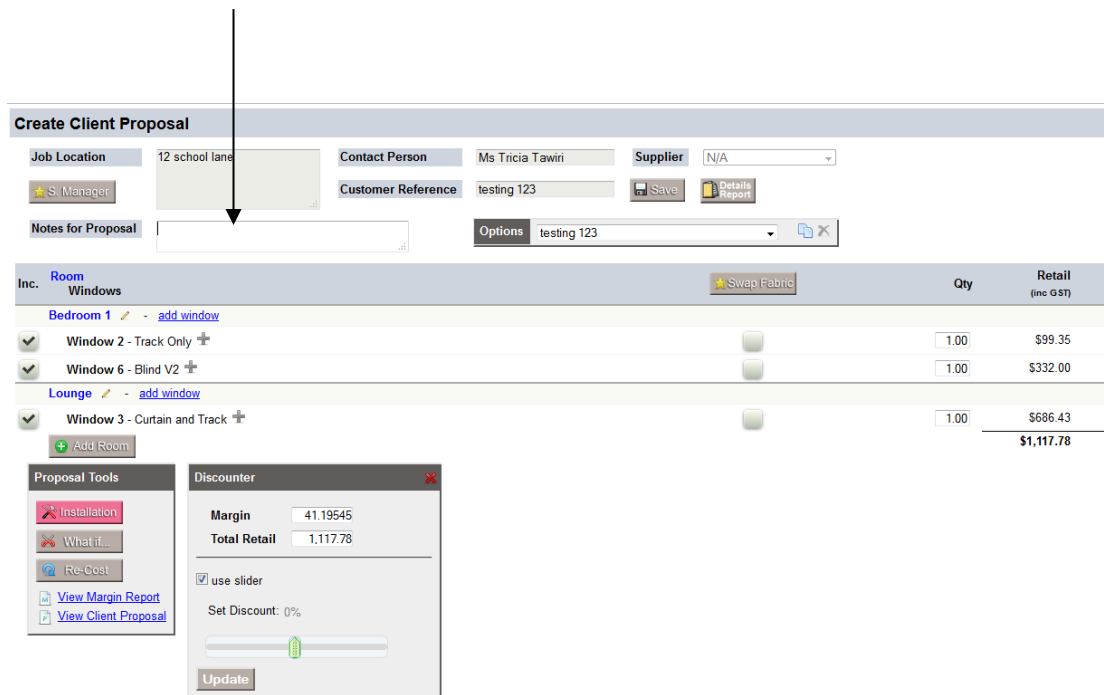
S Manager Customer Reference: testing 123 Save Details Report

Notes for Proposal: Options: testing 123

Inc.	Room	Windows	Swap Fabric	Qty	Retail (inc GST)		Discount	Total Retail (inc GST)
3		add window						
✓	3 - Roman Blind			1.00	\$911.95		\$0.00	\$911.95
	AERIS DUST Roman Blind - Lined, 1 x 2300 mm (2.3 m)			2.30	\$423.20	%		\$423.20
	AERIS DUST Roman Blind - Lined, 1 x 2300 mm (2.3 m)			2.30	\$423.20	%		\$423.20
	Workroom Charges: Making for Roman Blind - Lined			1.00	\$65.55	%		\$65.55
Bedroom 1 add window								
✓	Window 2 - Track Only			1.00	\$99.35		\$0.00	\$99.35
	MiniExcel Mini Track			1.00	\$99.35	%		\$99.35
✓	Window 2 - Curtain Only			1.00	\$3,477.60		\$0.00	\$3,477.60
✓	Window 6 - Blind V2			1.00	\$332.00		\$0.00	\$332.00
Bedroom 3 add window								
✓	Window 7 - Roman Blind			1.00	\$516.80		\$0.00	\$516.80
Laundry add window								
✓	Window 1 - Blind V2			1.00	\$450.80		\$0.00	\$450.80
Lounge add window								
✓	Window 3 - Curtain and Track			1.00	\$686.43		\$0.00	\$686.43
✓	Window 3 - Track Only			1.00	\$91.41		\$0.00	\$91.41
✓	Installation			1.00	\$278.53		\$0.00	\$278.53
					\$6,844.87		\$0.00	\$6,844.87
Add Room								
Proposal Tools								
								Gross Retail \$ 6,844.87
								Discount \$ 0.00

Adding notes for a proposal-

You can then enter any special instructions you would like to tell the client. These instructions will show up on the client proposal.



The screenshot shows the 'Create Client Proposal' interface. At the top, there are fields for 'Job Location' (12 school lane), 'Contact Person' (Ms Tricia Tawiri), and 'Supplier' (N/A). Below these are 'S. Manager', 'Customer Reference' (testing 123), and 'Options' (testing 123). A 'Notes for Proposal' text area is highlighted with a black arrow. The main table lists rooms and windows with their respective quantities and retail prices. A 'Proposal Tools' sidebar on the left includes buttons for 'Installation', 'What if...', 'Re-Cost', 'View Margin Report', and 'View Client Proposal'. A 'Discounter' pop-up window is also visible, showing 'Margin' (41.19545) and 'Total Retail' (1,117.78).

Inc.	Room	Qty	Retail (inc GST)
	Bedroom 1		
	Window 2 - Track Only	1.00	\$99.35
	Window 6 - Blind V2	1.00	\$332.00
	Lounge		
	Window 3 - Curtain and Track	1.00	\$686.43
			\$1,117.78

Proposal Tools

- Installation
- What if...
- Re-Cost
- View Margin Report
- View Client Proposal

Discounter

Margin: 41.19545

Total Retail: 1,117.78

☒ use slider

Set Discount: 0%

Update

Using What If-

You can also give your client a discount off the total job, to do this click on the green button under Proposal Tools then What if, Set Discount. You can slide this to either discount the job or add a percentage on to the job.

The screenshot displays the 'Create Client Proposal' application. At the top, there are fields for 'Job Location' (12 school lane), 'Contact Person' (Ms Tricia Tawin), 'Supplier' (N/A), 'Customer Reference' (testing 123), and 'Options' (testing 123). Below these is a 'Notes for Proposal' field. The main area is a table with columns: 'Qty', 'Retail (per unit)', 'Discount', and 'Total Retail (per unit)'. The table lists items like 'Bedroom 1', 'Window 2 - Track Only', 'Window 6 - Blind V2', 'Lounge', 'Window 3 - Curtain and Track', and 'Installation'. A 'Proposal Tools' sidebar on the left contains buttons for 'What If', 'View Margin Report', and 'View Client Proposal'. The 'What If' button is highlighted. A 'Discounter' dialog box is open, showing 'Margin' (42.334045) and 'Total Retail' (1,396.31). It has a 'Set Discount' slider set to 0% and an 'Update' button. A summary box on the right shows 'Gross Retail \$ 1,396.31', 'Discount \$ 0.00', and 'Total Retail \$ 1,396.31'. Arrows point from the 'What If' button and the 'Update' button in the dialog to the text in the paragraph above.

Qty	Retail (per unit)	Discount	Total Retail (per unit)
1.00	\$99.35	\$0.00	\$99.35
1.00	\$332.00	\$0.00	\$332.00
1.00	\$686.43	\$0.00	\$686.43
1.00	\$278.53	\$0.00	\$278.53
	\$1,396.31	\$0.00	\$1,396.31

Proposal Tools

- What If
- View Margin Report
- View Client Proposal

Discounter

Margin: 42.334045
Total Retail: 1,396.31

Set Discount: 0%

Update

Summary

Gross Retail	\$ 1,396.31
Discount	\$ 0.00
Total Retail	\$ 1,396.31

Using the Margin Report-

You can then view your margin report by clicking on the button under proposal tools

Margin Report for Proposal: testing 123

Item	Description	Qty	Retail (inc GST)	Discount	Net Retail (inc GST)	Margin (ex GST)	Margin % (ex GST)	Cost (ex GST)
Bedroom 1								
Window: Window 2								
MCP47 Set	MiniExcel Mini Track	1.00	\$99.35	\$0.00	\$99.35	\$32.74	38%	\$53.65
Window: Window 6								
MCPAV25New	Austro Venetian 25mm New	1.00	\$332.00	\$0.00	\$332.00	\$106.10	37%	\$182.60
Lounge								
Window: Window 3								
MCP336 Set	SheerTrack M System Single 50mm Bracket	1.00	\$69.15	\$0.00	\$69.15	\$22.79	38%	\$37.34
MCP97255s	French Holdback - Ball Black	2.00	\$35.90	\$0.00	\$35.90	\$31.22	100%	\$0.00
MCP13039951	Clear Acrylic Control Rod 0.75m	2.00	\$12.20	\$0.00	\$12.20	\$8.63	81%	\$1.98
TEX80097132	ALTO CHINO	4.80	\$422.40	\$0.00	\$422.40	\$151.30	41%	\$216.00
WORKROOM	Workroom Charges	1.00	\$146.78	\$0.00	\$146.78	\$47.63	37%	\$80.00
Installation		1.00	\$278.53	\$0.00	\$278.53	\$113.60	47%	\$128.60
			\$1,396.31	\$0.00	\$1,396.31	\$514.01	42%	\$700.17
							GST	\$105.03
							Total	\$805.20

[Print](#)

Customer Proposal-

You can also view and print the client proposal, you will see under here where you have given the client the extra discount off the job and also your special instructions



Ms Tricia Tawiri
12 school lane

Client Reference: testing 123

Date: 30 June 2015

Quote Expiry Date:

Sales Person:

- ☒ Standard
- ☐ Show all Details
- ☐ Show all Details + brand
- ☐ Total only view
- ☐ Total only view + brand

Description	Qty	Total Price (inc GST)
Room: Bedroom 1		
Window 2 - Track Only	1.00	\$99.35
Window 6 - Blind	1.00	\$332.00
Room subtotal : Bedroom 1		\$431.35
Room: Lounge		
Window 3 - Curtain and Track	1.00	\$686.43
Installation	1.00	\$278.53
		\$1,396.31
Total Price		\$ 1,396.31

Then you click on the save button your proposal will then sit under saved proposals

Create Client Proposal

Job Location: 12 school lane Contact Person: Ms Tricia Tawiri Supplier: Customer Reference: testing 123 Options: testing 123

Notes for Proposal:

Inc.	Room	Windows	Qty	Retail (inc GST)	Discount	Total Retail (inc GST)
	Bedroom 1	Window 2 - Track Only	1.00	\$99.35	\$0.00	\$99.35
		Window 6 - Blind V2	1.00	\$332.00	\$0.00	\$332.00
	Lounge	Window 3 - Curtain and Track	1.00	\$686.43	\$0.00	\$686.43
		Installation	1.00	\$278.53	\$0.00	\$278.53
				\$1,396.31	\$0.00	\$1,396.31

Proposal Tools

Installation Whatif... Re-Do's View Margin Report View Client Proposal

Discounter

Margin: 42.334045
Total Retail: 1,396.31

☒ use slider
Set Discount: 0%

Update

Gross Retail \$ 1,396.31
Discount \$ 0.00
Total Retail \$ 1,396.31

Update in the costs on existing proposals-

To update the prices to current RRP, either select the margin report or select the Recost button, in the proposal tools

Create Client Proposal

Job Location12 school lane

Contact PersonMs Tricia Tawiri

SupplierN/A

Star Manager

Customer Referencetesting 123

SaveDetails Report

Notes for Proposal

Optionstesting 123

Inc.	Room		Qty	Retail (inc GST)	Discount	Total Retail (inc GST)
	Windows	Swan Fabrics				
	Bedroom 1					
✓	Window 2 - Track Only		1.00	\$99.35	\$0.00	\$99.35
✓	Window 6 - Blind V2		1.00	\$332.00	\$0.00	\$332.00
	Bedroom 3					
✓	Window 7 - Roman Blind		1.00	\$516.80	\$0.00	\$516.80
	Lounge					
✓	Window 3 - Curtain and Track		1.00	\$686.43	\$0.00	\$686.43
✓	Installation		1.00	\$278.53	\$0.00	\$278.53
				\$1,913.11	\$0.00	\$1,913.11

Proposal Tools

Installation

What if...

Recost

View Margin Report

View Client Proposal

Gross Retail\$ 1,913.11

Discount\$ 0.00

Total Retail\$ 1,913.11

CancelSaveCreate Order