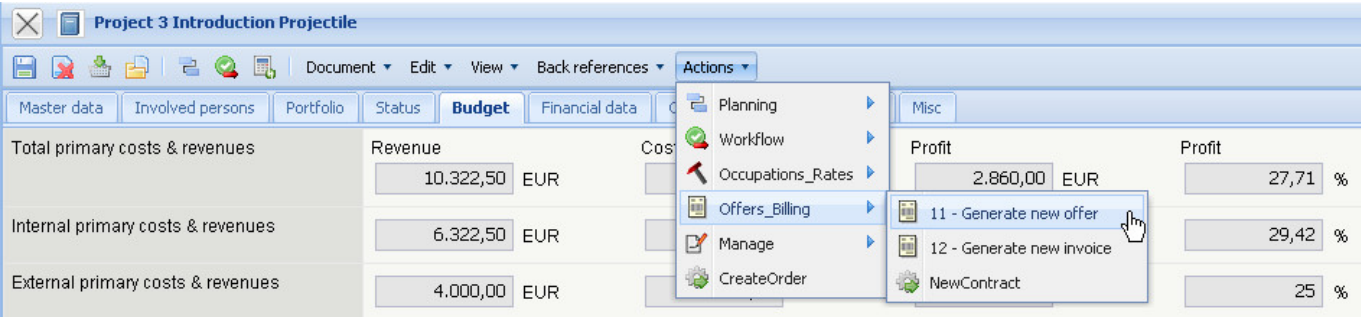


[previous](#) [Home](#) [next](#)

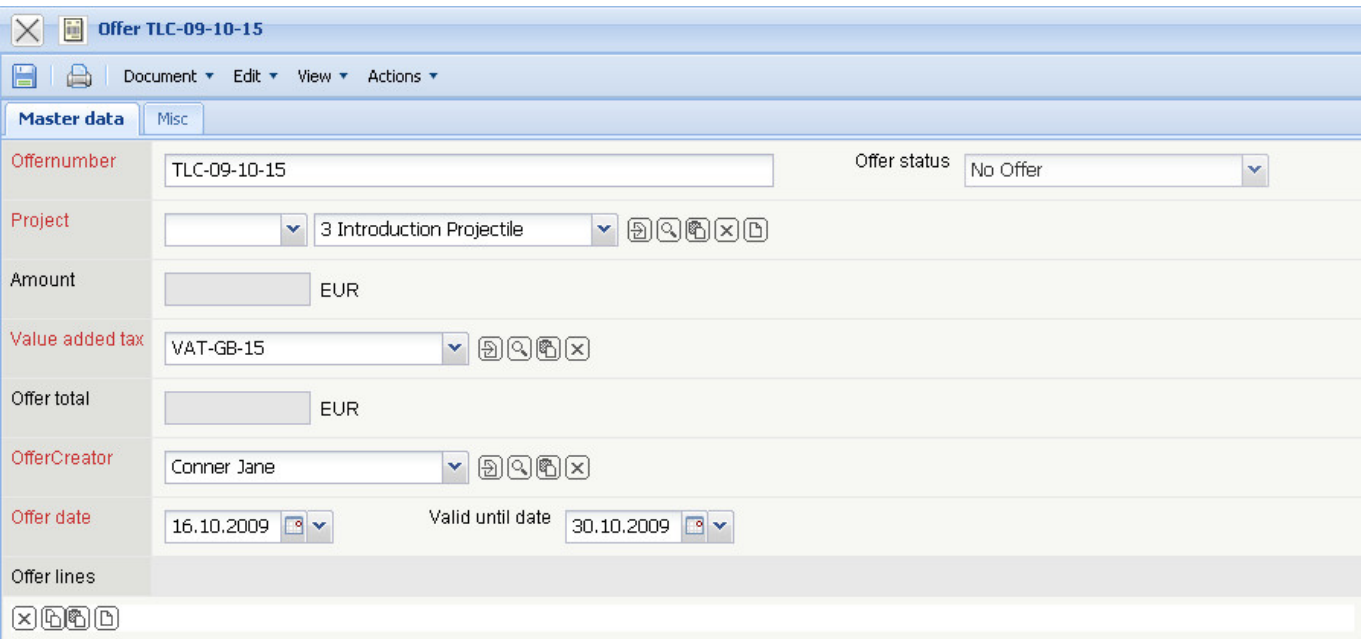
# 5.05 Generate Offer

## Generating New Offers

After the planning phase is completed, you can create an offer-header by using the action...



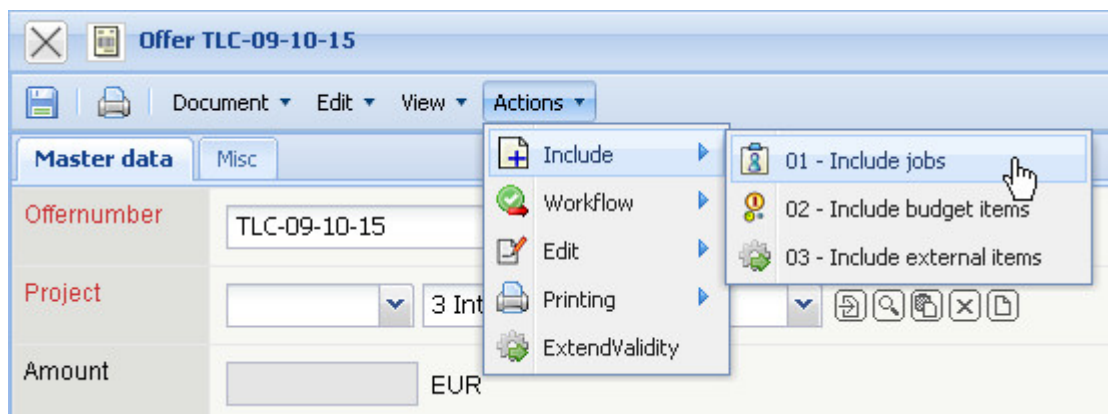
... "Generate new offer".



This offer-header can be completed and then saved.

## Including Positions

Afterwards each item of the offer can be added. At first the working capacities will be included (in terms of jobs). By activating the action "Include jobs"...



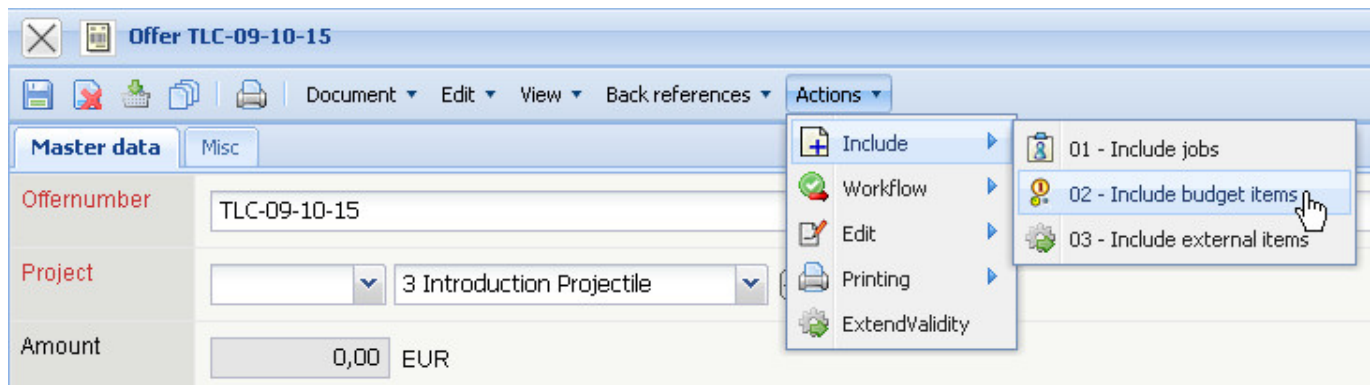
... every job for the project (including every sub-project) will be listed. By marking the appropriate items and by activating the action "Include jobs", selected jobs will be generated as offer positions in the offer. In the example, first all jobs are selected with the function "Toggle select" ...

| Selection                           |        |                                                   |               |                               |                |  |
|-------------------------------------|--------|---------------------------------------------------|---------------|-------------------------------|----------------|--|
| Confirm and include                 |        |                                                   |               |                               |                |  |
| page 1 of 1                         |        |                                                   |               |                               |                |  |
|                                     | Number | Description                                       | Employee      | Occupation                    | Estimated time |  |
| <input checked="" type="checkbox"/> | 1 3-1  | Conception for combining Projectile and SAP CO/FI | Timothy Jones | Occupation Customizing        | 16,00          |  |
| <input checked="" type="checkbox"/> | 2 3-3  | Installation Projectile                           | Timothy Jones | Occupation Installation       | 3,50           |  |
| <input checked="" type="checkbox"/> | 3 3-4  | Programming 4-3                                   | Timothy Jones | Occupation Programming - Java | 40,00          |  |
| <input checked="" type="checkbox"/> | 4 3-5  | Programming 4-3                                   | Tate Adam     | Occupation Programming - Java | 40,00          |  |

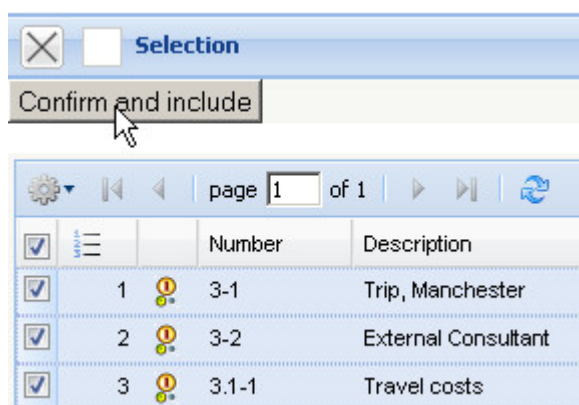
... and then one job will be unselected. In the example below three jobs are included as positions in the offer.

| Selection                           |        |                                                   |               |                               |                |  |
|-------------------------------------|--------|---------------------------------------------------|---------------|-------------------------------|----------------|--|
| Confirm and include                 |        |                                                   |               |                               |                |  |
| page 1 of 1                         |        |                                                   |               |                               |                |  |
|                                     | Number | Description                                       | Employee      | Occupation                    | Estimated time |  |
| <input checked="" type="checkbox"/> | 1 3-1  | Conception for combining Projectile and SAP CO/FI | Timothy Jones | Occupation Customizing        | 16,00          |  |
| <input checked="" type="checkbox"/> | 2 3-3  | Installation Projectile                           | Timothy Jones | Occupation Installation       | 3,50           |  |
| <input type="checkbox"/>            | 3 3-4  | Programming 4-3                                   | Timothy Jones | Occupation Programming - Java | 40,00          |  |
| <input checked="" type="checkbox"/> | 4 3-5  | Programming 4-3                                   | Tate Adam     | Occupation Programming - Java | 40,00          |  |

Next the planning data of the budget administration can also be included in the offer. The planed time/effort of the budget administration builds the basis of the offer preparation and can be displayed through the action "Include budget items".



The system lists all the budget items for this project, including the sub-projects. By marking the appropriate items and by activating the action “Include budget items”, selected budget items will be generated as offer positions in the offer. In the example below three budgets are included...



... as positions in the offer.

| Offer lines |          |                                       |        |          |                 |                 |
|-------------|----------|---------------------------------------|--------|----------|-----------------|-----------------|
| 1-3 / 3     |          |                                       |        |          |                 |                 |
|             | Position | Description                           | Hours  |          | Amount external | Amount internal |
| 1           | 19-1     | Job 4-1<br>Installation/Configuration | 8:00 h | 1 Pd     | 2.000,00        | 2.000,00        |
| 2           | 19-2     | Budget 3-2 External<br>Consultant     | 1:00 h | 0,125 Pd | 4.500,00        | 3.400,00        |
| 3           | 19-3     | Budget 3.1-1 Travel costs             | 1:00 h | 0,125 Pd | 2.000,00        | 2.000,00        |

All positions of the offer can be changed or adjusted manually. This happens when you change the amount field or the external amount field. The associated hourly rate of the relevant job is known by the system and the sum will be updated automatically.

In the example below the third and the sixth job will be changed (in each case to 5Pt).

Im Beispiel unten werden das dritte und das sechste Arbeitspaket (auf jeweils 5 Pt) abgeändert.

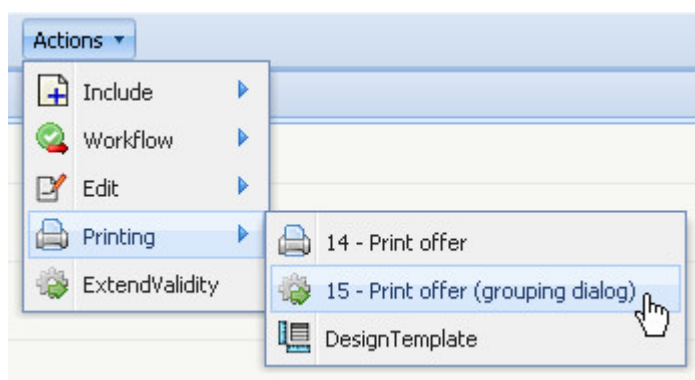
| Offer lines |          |                                       |        |          |                 |                 |
|-------------|----------|---------------------------------------|--------|----------|-----------------|-----------------|
| 1-3 / 3     |          |                                       |        |          |                 |                 |
|             | Position | Description                           | Hours  |          | Amount external | Amount internal |
| 1           | 19-1     | Job 4-1<br>Installation/Configuration | 8:00 h | Pd       | 2.000,00        | 2.000,00        |
| 2           | 19-2     | Budget 3-2 External<br>Consultant     | 1:00 h | 0,125 Pd | 4.500,00        | 3.400,00        |
| 3           | 19-3     | Budget 3.1-1 Travel costs             | 1:00 h | 0,125 Pd | 2.000,00        | 2.000,00        |

Nach dem Speichern des Angebotes werden die Positionen und der Angebotskopf aktualisiert. Das System verändert dabei automatisch die externen Beträge nach der Preistabelle des Projektes ab und bestimmt den aktuellen Gesamtbetrag des Angebotes.

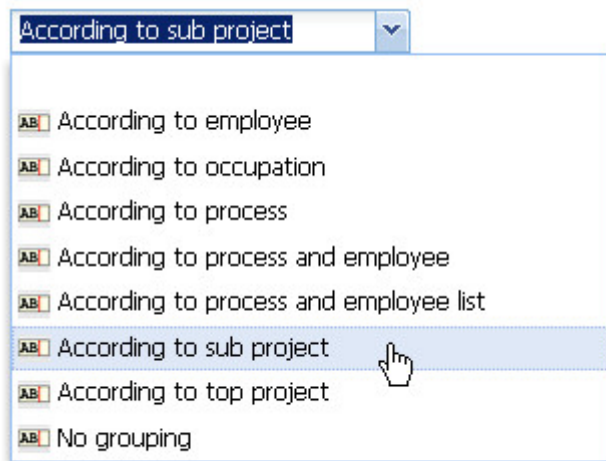
|                 |                                                                                                              |
|-----------------|--------------------------------------------------------------------------------------------------------------|
| Amount          | <input type="text" value="3.500,00"/> EUR                                                                    |
| Value added tax | VAT-GB-15 <input type="button" value="v"/> <input type="button" value="f"/> <input type="button" value="x"/> |
| Offer total     | <input type="text" value="9.775,00"/> EUR                                                                    |

## Printing Offers

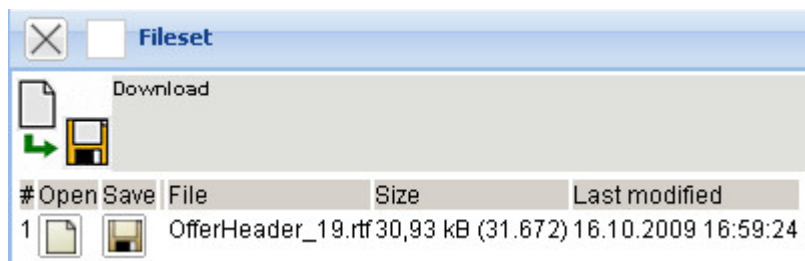
Der Angebotsausdruck kann nun mit Hilfe der Standardtextverarbeitung angezeigt und ausgedruckt werden. Dazu wird die Aktion "Angebot drucken (Auswahl Gruppierung)" betätigt.



Im Zwischendialog kann der Ausdruck beeinflusst werden. Hier kann zwischen Ausdruck auf Arbeitspaketebene, gruppiert nach Mitarbeiter, gruppiert nach Teilprojekten (1. Ebene anzeigen), gruppiert nach Tätigkeiten oder als eine Zeile mit Gesamtsumme auf Projektebene gewählt werden.



Das System erzeugt dann eine RTF-Datei die im folgenden Dialog geöffnet oder gespeichert werden kann.



Die Option "Öffnen" öffnet das generierte Angebot im konfigurierten Browser oder der Textverarbeitung.

Offer\_Engl.odt - OpenOffice.org Writer

Datei Bearbeiten Ansicht Einfügen Format Tabelle Extras Fenster Hilfe

Standard Arial 10

Information Desire Software GmbH · An der Brunnenstube 25 · D - 55120 Mainz  
TLC Telecommunications Corporation  
Mister George Williams

101 Kensington High Street  
W8 4 LONDON

**OFFER: TLC-09-10-16**

Project: Introduction Accounting

We offer you the following items:

| Pos. | Description                                                  | Amount | Price                    | Total             |
|------|--------------------------------------------------------------|--------|--------------------------|-------------------|
| 1    | Job - <u>Introduction</u> minus 20,0 % <u>trade discount</u> | 24     | 96,00 €                  | 2.304,00 €        |
|      |                                                              |        |                          |                   |
|      |                                                              |        | <b>Subtotal</b>          | 2.304,00 €        |
|      |                                                              |        | Value-Added Tax:<br>15 % | 345,60 €          |
|      |                                                              |        | <b>Total</b>             | <b>2.649,60 €</b> |
|      |                                                              |        |                          |                   |

Terms of Payment: within 14 days

We are looking forward to receiving your order.

<Name> <Name>  
<Function> <Function>

Seite 1 / 1 Standard Deutsch (Deutschland) EINFUG STD

## Including Offers

Wenn die Angebotserstellung abgeschlossen ist, muss das Angebot mit Hilfe der entsprechenden Aktion übernommen werden.

The screenshot shows the 'Offer TLC-09-10-15' form. The 'Master data' tab is active. The 'Offernumber' is 'TLC-09-10-15', 'Project' is '3 Introduction Projectile', 'Amount' is '8.500,00 EUR', 'Value added tax' is 'VAT-GB-15', 'Offer total' is '9.775,00 EUR', 'OfferCreator' is 'Conner Jane', and 'Offer date' is '16.10.2009' with 'Valid until date' '30.10.2009'. The 'Actions' menu is open, showing options like 'Include', 'Workflow', 'Edit', 'Printing', and 'ExtendValidity'. The 'Workflow' sub-menu is open, showing options like '05 - Cancel offer', '05 - Finalise offer' (highlighted), '07 - Delete offer', '08 - New offer out of cancellation', '09 - New invoice out of offer', '10 - Remove link to original offer', and '13 - New Confirmation'.

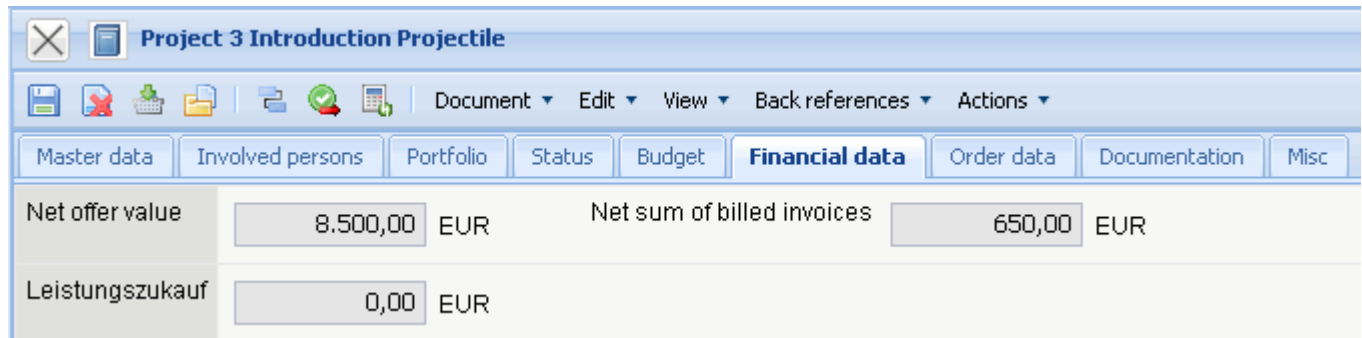
Dabei ändert sich der Angebotsstatus auf "Angebot übernommen" und das Angebot ist schreibgeschützt.

The screenshot shows the 'Offer TLC-09-10-15' form after the 'Finalise offer' action. The 'Offer status' is now 'Offer Included'. The other fields remain the same: 'Offernumber' 'TLC-09-10-15', 'Project' '3 Introduction Projectile', 'Amount' '8.500,00 EUR', 'Value added tax' 'VAT-GB-15', 'Offer total' '9.775,00 EUR', 'OfferCreator' 'Conner Jane', and 'Offer date' '16.10.2009' with 'Valid until date' '30.10.2009'.

Im Projekt wird dann der Status des Projektes von passiv auf offenes Angebot gesetzt.

The screenshot shows the 'Project 3 Introduction Projectile' form. The 'Master data' tab is active. The 'Project number' is '3', 'Description' is 'Introduction Projectile', and 'Project start/end date' is 'From 16.10.2009 To 30.10.2009'. The 'Status' is 'Open'.

Auf dem Budgetreiter wird im Element Angebotswert auch der Nettobetrag des Angebotes übertragen. Analog aktualisiert das System auch bei der Rechnungsstellung das Element Rechnungsbetrag.



| Project 3 Introduction Projectile                                                                        |              |
|----------------------------------------------------------------------------------------------------------|--------------|
| Document Edit View Back references Actions                                                               |              |
| Master data Involved persons Portfolio Status Budget <b>Financial data</b> Order data Documentation Misc |              |
| Net offer value                                                                                          | 8.500,00 EUR |
| Net sum of billed invoices                                                                               | 650,00 EUR   |
| Leistungszukauf                                                                                          | 0,00 EUR     |

Bei Modifikationen am Angebot muss dieses zunächst storniert werden. Anschließend kann ein neues Angebot erzeugt werden, welches automatisch die Vorgängerversion des Angebotes beinhaltet (weitere Informationen finden Sie im Abschnitt 4.4.1).

From:  
<https://infodesire.net/dokuwiki/> - **Projectile-Online-Handbuch**

Permanent link:  
[https://infodesire.net/dokuwiki/doku.php?id=en:handbuch:kapitel\\_4:4.05\\_angebote\\_erstellen&rev=1256222213](https://infodesire.net/dokuwiki/doku.php?id=en:handbuch:kapitel_4:4.05_angebote_erstellen&rev=1256222213)

Last update: **2019/10/25 14:09**

