5.05 Generate Offer

Generating New Offers

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

Project 3 Introduction Projectile						
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Master data Involved persons Portfolio	Status Budget	Financial data C	2	Planning 🕨 🕨	Misc	
Total primary costs & revenues	Revenue	Cos		.Workflow	Profit Profit	
	10.322,50	EUR	1	Occupations_Rates	2.860,00 EUR 27,71 %	,
Internal nrimany costs & revenues		in the second		Offers_Billing	11 - Generate new offer	
	6.322,50	EUR	ď	Manage 🕨 🕨	12 - Generate new invoice 29,42 %	
External primary costs & revenues	4.000,00	EUR	-	CreateOrder	NewContract 25 %	,

... "Generate new offer".

🗙 🧾 Offer T	FLC-09-10-15
📄 🔒 Doc	ument - Edit - View - Actions -
Master data	Misc
Offernumber	TLC-09-10-15 Offer status No Offer
Project	▼ 3 Introduction Projectile ▼ ⊕ < ♥
Amount	EUR
Value added tax	VAT-GB-15 ▼ Ð Q @ X
Offer total	EUR
OfferCreator	Conner Jane V D C m X
Offer date	16.10.2009 🖸 🗸 Valid until date 30.10.2009 🖻 🗸
Offer lines	
×660	

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"...

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🗙 📑 Offer 1	rLC-09-10-15				
📄 🚔 Doc	ument 🔹 Edit 🔹 View 🔹	Acti	ons 🔹		
Master data	Misc	1	Include	•	👔 01 - Include jobs
Offernumber	TLC-09-10-15	9	Workflow	•	8 02 - Include budget items
	100000	Ľ	Edit		🍪 03 - Include external items
Project	🗸 🗸 🖌 🖌		Printing		- DOBXD
Amount		-	ExtendValidity		
Amount	EUR				

... 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" ...

X		Selec	tion				
Cor	nfirm ai	nd ind	lude				
÷	• [4	4	page 1 of	1 🕨 🕅 🎅			
	Ξ		Number	Description	Employee	Occupation	Estimated time
✓	1	8	3-1	Conception for combining Projectile and SAP CO/FI	Timothy Jones	Occupation Customizing	16,00
	2	8	3-3	Installation Projectile	Timothy Jones	Occupation Installation	3,50
	3	8	3-4	Programming 4-3	Timothy Jones	Occupation Programming - Java	40,00
	4	8	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.

X		Selec	tion				
Cor	nfirm a	nglina	clude				
-		Ν					
-	• 14	4	page 1 of	1 🕨 🕅 🌊			
	Ξ		Number	Description	Employee	Occupation	Estimated time
	1	8	3-1	Conception for combining Projectile and SAP CO/FI	Timothy Jones	Occupation Customizing	16,00
	2	8	3-3	Installation Projectile	Timothy Jones	Occupation Installation	3,50
	3	8	3-4	Programming 4-3	Timothy Jones	Occupation Programming - Java	40,00
	4	8	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".

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🗙 📄 Offer 1	FLC-09-10-15				
🖹 🔒 📩 🗇	🛛 🔒 🛛 Document 🔹 Edit 👻 View 💌 Back references 💌	Acti	ons 🔻		
Master data	Misc	1	Include	•	🗿 01 - Include jobs
Offernumber	TI C-09-10-15	2	Workflow		🙎 02 - Include budget items 🎧
		Ľ	Edit		🍪 03 - Include external items
Project	✓ 3 Introduction Projectile		Printing	•	
Amount	0,00 EUR	-	ExtendValidity		

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...

\times) 🗌 !	5elec	tion	
Cor	nfirm ar	nd in	clude	
888	- 14	4	page 1 c	EI D DI 20
555	1			
v	<u>-</u>		INUMBER	Description
		-		
	1	8	3-1	Trip, Manchester
V	1	9 9	3-1 3-2	Trip, Manchester External Consultant

... as positions in the offer.

Offer lir	nes						
×b	18	┣ 1-3/3 🛛 🕨					
	_	Position	⊖ Description	⇔	Hours	Amount external	Amount internal
1		19-1	Job 4-1 Installation/Configuration	8:00	h 1 Pd	2.000,00	2.000,00
2		19-2	Budget 3-2 External 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 first job will be changed.

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Offer lir	nes					
×b	6	BB 1-3/3 ((4)				
		\ominus Position	⊖ Description	\ominus Hours	\ominus Amount external	\ominus Amount internal
1		19-1	Job 4-1 Installation/Configuration	8:00 h 1 Pd	2.000,00	2.000,00
2		19-2	Budget 3-2 External 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

After saving the offer, the different positions will be updated in the template. The system changes automatically the external amounts by using the cost index of the project and calculates the actual total amount.

Amount	8.500,00 EUR	
Value added tax	VAT-GB-15	▼ ∄Q®×
Offer total	9.775,00 EUR	

Printing Offers

The offer can be shown and printed with a standard word processing program. For this activate the action "print offer (grouping dialogue)".

+	Include	۲	
0	Workflow	۲	
ď	Edit	₽	
	Printing	•	14 - Print offer
	ExtendValidity		15 - Print offer (grouping dialog) fh-
			DesignTemplate

The print can be controlled in the intermediate dialogue. You can choose between printing according to a process, according to employees, according to sub-projects (display 1st level), according to an occupation or in one line with the total sum on the project level.

According to sub project 🛛 🗸
According to employee
According to occupation
According to process
According to process and employee
According to process and employee list
According to sub project
According to top project
📧 No grouping

The system then generates an RTF-file, which can be opened and saved in the following dialogue.

Fileset					
#Open Save File	Size	Last modified			
1 📄 🔛 OfferHeader	_19.rtf30,93 kB (3	31.672) 16.10.2009 16:59:24			

The "open" option opens the generated offer in a configured browser or in a word processing program.

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Including Offers

After the offer preparation is completed, the offer must be included using the appropriate action.

Offer TLC-09-10-15						
😑 🧝 🎂 🗇 🛯 🚐 🔹 Document 👻 Edit 👻 View 👻 Back references 👻 Actions 💌						
Master data	Misc	📑 Include 🛛				
Offernumber	TI C-09-10-15	🝳 Workflow 🛛 🕨	💫 05 - Cancel offer			
1609-10-13		🛛 🗹 Edit	🎄 05 - Finalise offer விர			
Project	✓ 3 Introduction Projectile	🔁 Printing 💦 🖡	07 - Delete offer			
Amount	0.500.00	🔯 ExtendValidity	08 - New offer out of cancellation			
1 million in	8.500,00 EUR		🍪 09 - New invoice out of offer			
Value added tax	VAT-GB-15 ▼ ∰��♥		🌼 10 - Remove link to original offer			
06			🎲 13 - New Confirmation			
Offer total	9.775,00 EUR					
OfferCreator	Conner Jane					
Offer date	16.10.2009	2009 🖪 🗸				

The offer status will then be changed to "offer included" and the offer is write-protected (read-only).

Offer TLC-09-10-15						
🎂 🗂 🔒 Document 🔹 Edit 👻 View 🔹 Back references 🔹 Actions 🔹						
Master data	Misc					
Offernumber	TLC-09-10-15 Offer status Offer Included					
Project	3 Introduction Projectile					
Amount	8.500,00 EUR					
Value added tax	VAT-GB-15					
Offer total	9.775,00 EUR					
OfferCreator	Conner Jane					
Offer date	16.10.2009 💌 Valid until date 30.10.2009 🖃 🗸					

In the project the status of the project changes from passive into an open offer.

Project 3 Introduction Projectile						
😑 🧝 📥 😑 🖻 🕿 🥝 🗒 Document 🔻 Edit 🔹 View 🔹 Back references 🔹 Actions 👻						
Master data Involved persons Portfolio Status Budget Financial data Order data Documentation Misc						
Project number	Number 3 Open 🗸					
Description	Introduction Projectile					
Project start/end date	From 16.10.2009 • 30.10.2009 • 10					

On the budget tab the subtotal of the offer is also transfered into the element offer value. At the same time the system also updates the invoice amount in the invoice.

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Project 3 Introduction Projectile					
📄 🧝 📥 😑 🗧 🥝 🗐 Document 🔹 Edit 🔹 View 🔹 Back references 🔹 Actions 🔹					
Master data Involved persons Portfolio Status Budget Financial data Order data Documentation Misc					
Net offer value	8.500,00 EUR	Net sum of billed invoices	650,00 EUR		
Leistungszukauf	0,00 EUR				

When modifying the offer, it must be cancelled first. Afterwards a new offer can be generated, which will contain the previous version of the offer. (You can find more information in section 4.4.1).

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