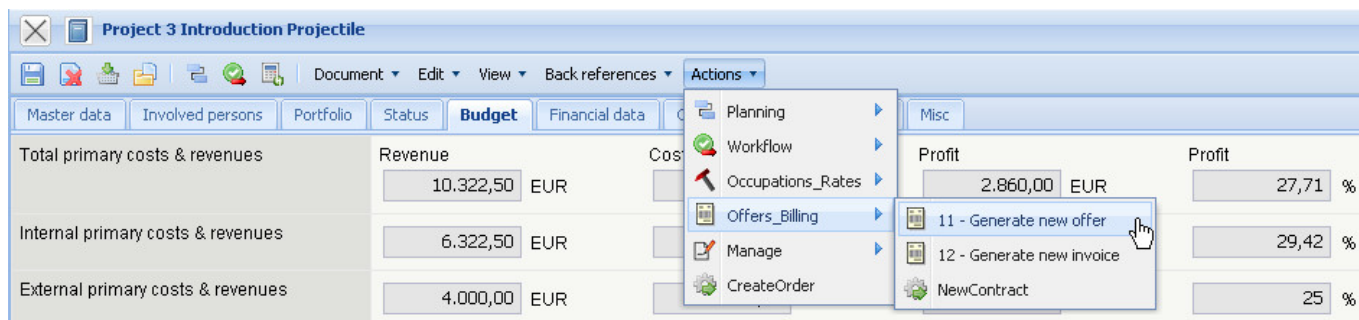


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5.05 Generate Offer

Generating New Offers

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



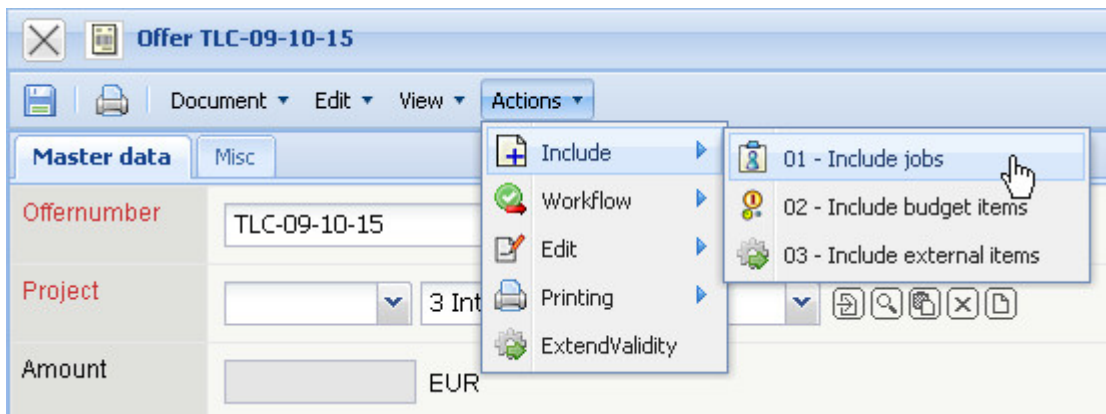
... “Generate new offer”.

Offernumber	TLC-09-10-15	Offer status	No Offer
Project	3 Introduction Projectile		
Amount		EUR	
Value added tax	VAT-GB-15		
Offer total		EUR	
OfferCreator	Conner Jane		
Offer date	16.10.2009	Valid until date	30.10.2009

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”...



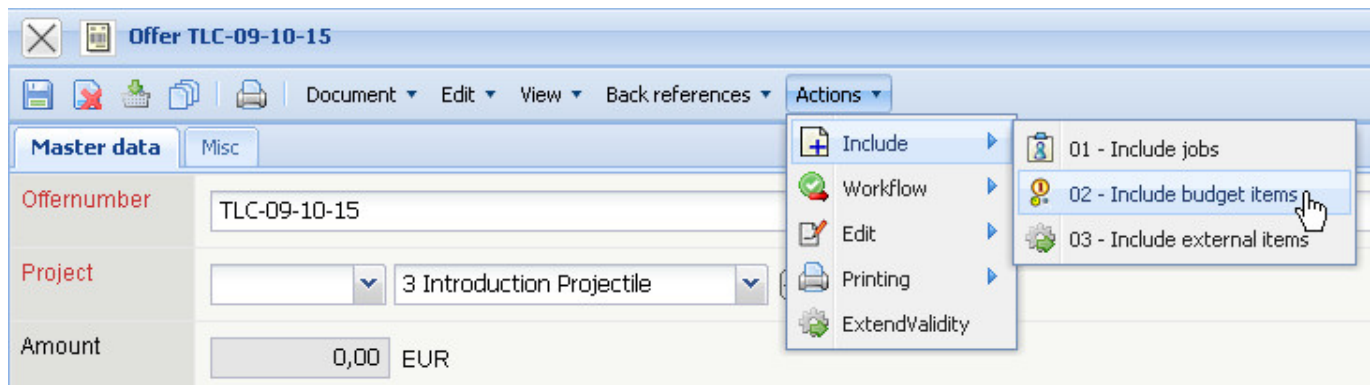
... every job for the project (including every sub-project) will be listed. By marking the appropriate items and by activating the action "Include jobs", selected jobs will be generated as offer positions in the offer. In the example, first all jobs are selected with the function "Toggle select" ...

Selection						
Confirm and include						
page 1 of 1						
	Number	Description	Employee	Occupation	Estimated time	
☒	1 3-1	Conception for combining Projectile and SAP CO/FI	Timothy Jones	Occupation Customizing	16,00	
☒	2 3-3	Installation Projectile	Timothy Jones	Occupation Installation	3,50	
☒	3 3-4	Programming 4-3	Timothy Jones	Occupation Programming - Java	40,00	
☒	4 3-5	Programming 4-3	Tate Adam	Occupation Programming - Java	40,00	

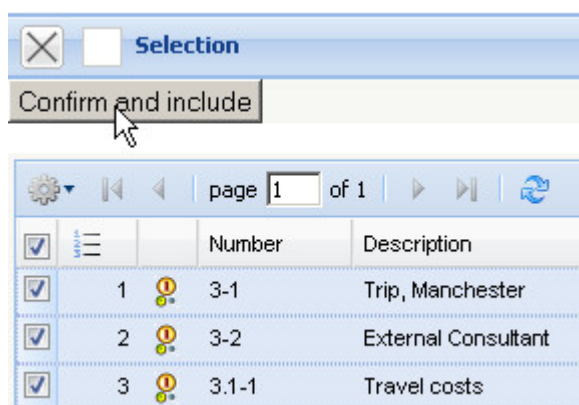
... and then one job will be unselected. In the example below three jobs are included as positions in the offer.

Selection						
Confirm and include						
page 1 of 1						
	Number	Description	Employee	Occupation	Estimated time	
☒	1 3-1	Conception for combining Projectile and SAP CO/FI	Timothy Jones	Occupation Customizing	16,00	
☒	2 3-3	Installation Projectile	Timothy Jones	Occupation Installation	3,50	
☐	3 3-4	Programming 4-3	Timothy Jones	Occupation Programming - Java	40,00	
☒	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 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.

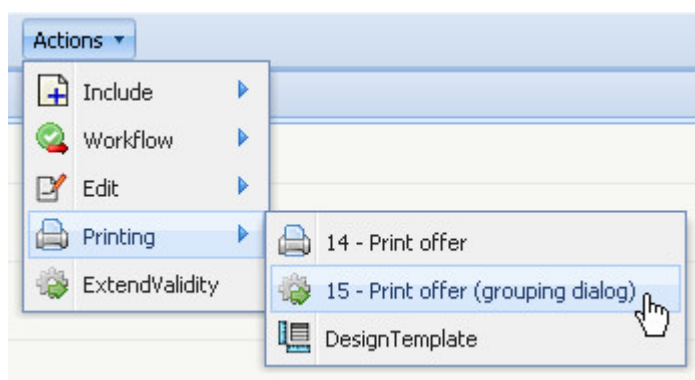
Offer lines						
1-3 / 3						
	Position	Description	Hours		Amount external	Amount internal
1	19-1	Job 4-1 Installation/Configuration	8:00 h	Pd	2.000,00	2.000,00
2	19-2	Budget 3-2 External Consultant	1:00 h	0,125 Pd	4.500,00	3.400,00
3	19-3	Budget 3.1-1 Travel costs	1:00 h	0,125 Pd	2.000,00	2.000,00

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.

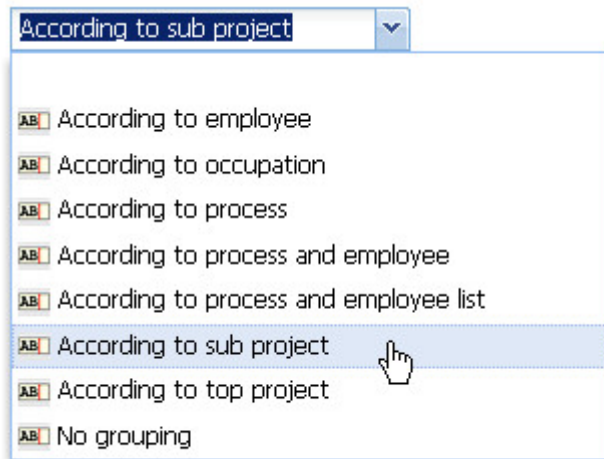
Amount	3.500,00 EUR
Value added tax	VAT-GB-15
Offer total	9.775,00 EUR

Printing Offers

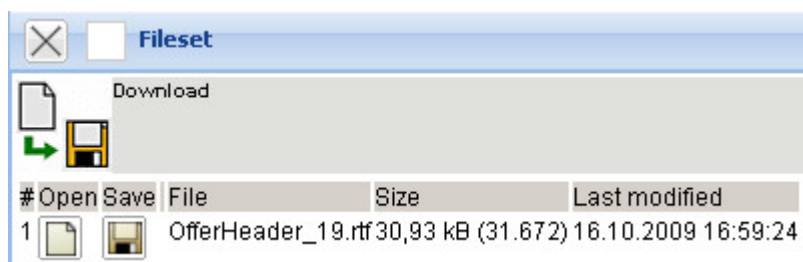
The offer can be shown and printed with a standard word processing program. For this activate the action "print offer (grouping dialogue)".



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.



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



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

Offer_19.rtf (schreibgeschützt) - OpenOffice.org Writer

File Edit View Insert Format Table Extras Window Help

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-09-10-15
Project: Introduction Projectile
We offer you the following items:

Pos.	Description	Amount	Price	Total
01	Job 4-1 Installation/Configuration	8,00	250,00 €	2.000,00 €
02	Budget 3-2 External Consultant	1,00	4.500,00 €	4.500,00 €
03	Budget 3.1-1 Travel costs	1,00	2.000,00 €	2.000,00 €
Subtotal				8.500,00 €
Value-Added Tax.: 15 %				1.275,00 €
Total				9.775,00 €

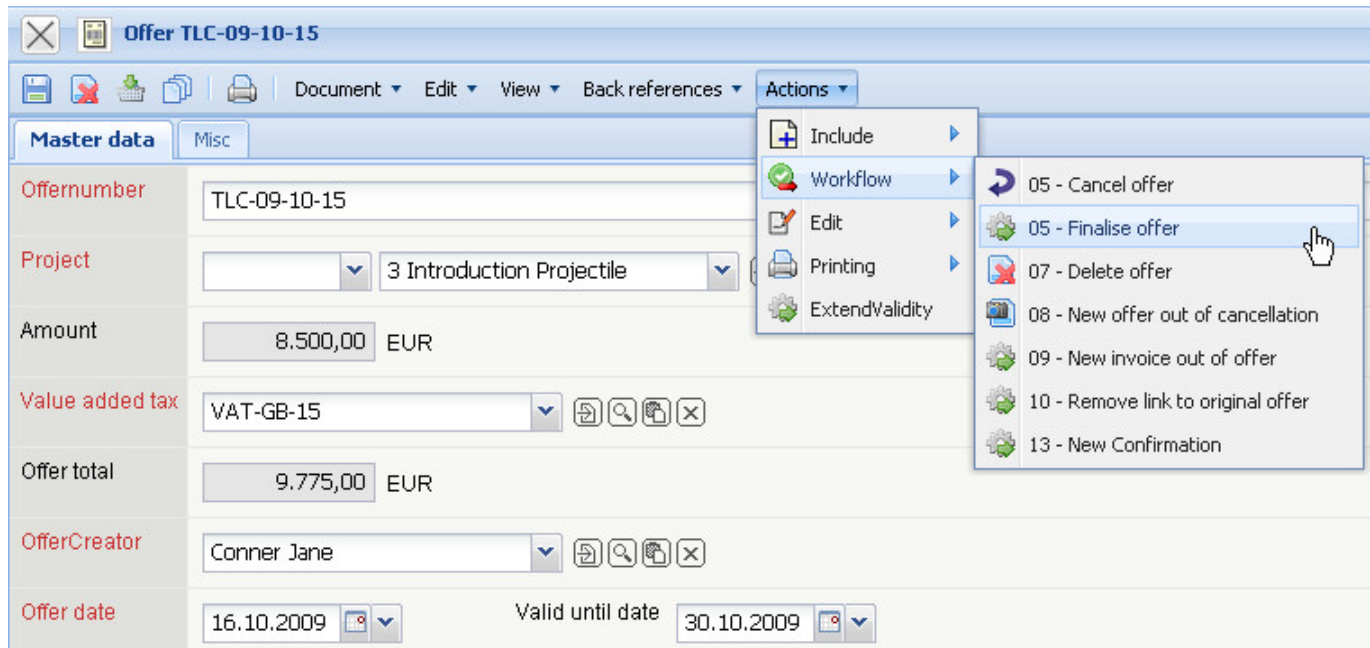
Terms of Payment: within 14 days
We are looking forward to receiving your order.

<Name> <Name>

Seite 1 / 2 Standard STD

Including Offers

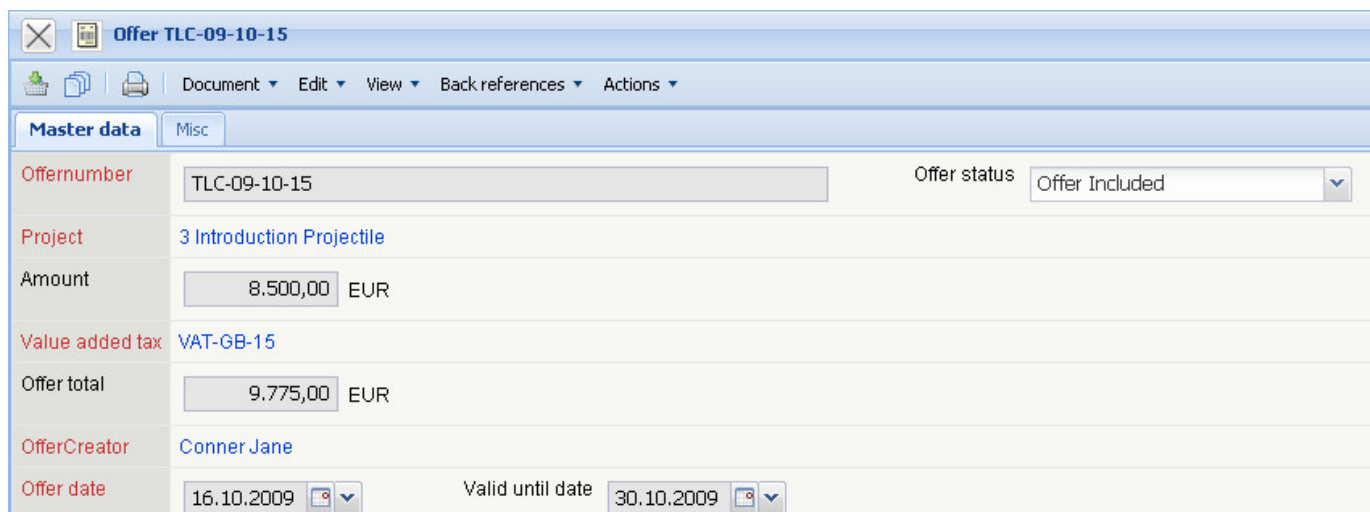
After the offer preparation is completed, the offer must be included using the appropriate action.



The screenshot shows the 'Offer TLC-09-10-15' form. The 'Actions' menu is open, displaying a list of actions. The '05 - Finalise offer' action is highlighted by a mouse cursor. The form fields are as follows:

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	
Offer date	16.10.2009	Valid until date 30.10.2009

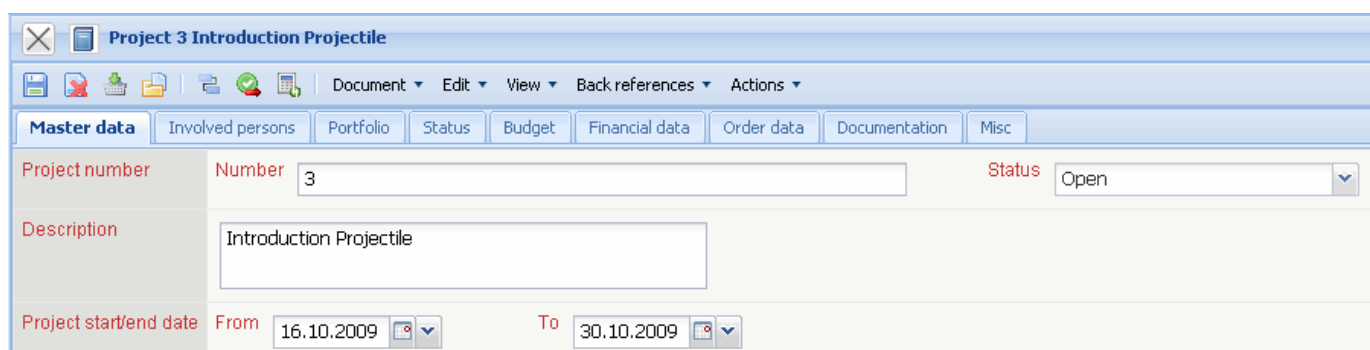
The offer status will then be changed to “offer included” and the offer is write-protected (read-only).



The screenshot shows the 'Offer TLC-09-10-15' form with the 'Offer status' dropdown set to 'Offer Included'. The form fields are as follows:

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.



The screenshot shows the 'Project 3 Introduction Projectile' form. The 'Status' dropdown is set to 'Open'. The form fields are as follows:

Project number	Number 3	Status	Open
Description	Introduction Projectile		
Project start/end date	From 16.10.2009	To	30.10.2009

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

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

