

Proposal Management Application

This system, developed for a local construction company, enables the company to track and maintain job proposals sent to customers and contractors. Data entered for a proposal is merged with a proposal template producing the output document that can be printed or automatically e-mailed. The system also produces a number of reports.

When the application first starts, the **Proposal Search Screen** is displayed. The user can search for proposals based on various criteria and select a proposal to work with from the resulting list.

The screenshot shows the 'Proposal Search Screen' within the 'Proposal Manager' application. The interface includes a sidebar with navigation icons for Proposal, Customer, Employee, Tables, Reports, Config, and Exit. The main window contains several search filter sections:

- Search Fields:** Search for a proposal or group of proposals by using either the Proposal ID or a combination of the other fields below.
- Proposal ID:** Text input field.
- Date Added:** Radio buttons for 'Any' or 'Between', with date pickers.
- Due Date:** Radio buttons for 'Any' or 'Between', with date pickers.
- Project Name:** Radio buttons for 'Any', 'Contains', 'Starts with', and 'Is Exactly'.
- Customer:** Radio buttons for 'Any', 'Name Contains', 'Name Starts with', and 'Name Is Exactly', plus a 'Customer ID' input field.
- Quoted By:** Radio buttons for 'Any' and 'Select', with a dropdown menu.
- Last Updated:** Radio buttons for 'Any' or 'Between', with date pickers.
- Start Date:** Radio buttons for 'Any' or 'Between', with date pickers.
- Status:** Radio buttons for 'Any' or 'Select', with a list of status options: Cancelled, Completed, Job Awarded, and New Proposal.

A **Search** button is located to the right of the filter sections. Below the filters is a **Search Results** section showing **6 Record(s) Found.** The results are displayed in a table:

ID	Project Name	Customer	Status	Last Update
1			Not Prop.	6/15/2009
2			Not Prop.	1/16/2008
3			Not Prop.	1/16/2008
4			Not Prop.	11/13/2008
5			Not Prop.	11/13/2008
6			Not Prop.	9/11/2008

The application footer shows the date 6/15/2009 and the time 11:03 AM.

The **Proposal Management Screen** is shown below. It consists of six tabs; all except "Notes" can be used to build the proposal. The "Proposal" tab is shown open below; where the user will enter the body text of the proposal, along with a description and a subtotal price. (The "Voluntary Alternate" tab is identical to the "Proposal" tab; it allows the user create an "alternative" proposal in case the original is not accepted by the customer.)

Proposal Manager - [Proposal Management Screen]

Key Information

Proposal ID: [] Date Added: 7/27/2007 Last Updated: 6/15/2009
 Quoted By: [] Bid Due Date: [] Start Date: [] Proposal Status: Completed
 Project Name: [] Co.: [] Drawings In
 Customer: [] Multi-Contractor Bid

Proposal | Voluntary Alternate | Additions | Exclusions | Inclusions | Notes

Proposal Description: [] Proposal Subtotal: \$73,020.00

Estimate Totals

Proposal:	Furnish & Install:	\$76,220.00	Discount:	\$0.00	Adjusted Total:	\$76,220.00
Vol Alt:	Furnish & Install:	\$0.00	Discount:	\$0.00	Adjusted Total:	\$0.00

First Prev New Edit Delete Print Email Save Cancel Close Next Last

6/15/2009 11:06 AM

The "Additions" tab allows the user specify additional items that will be added on to the main proposal subtotal to arrive at the full amount of the quote.

Proposal Manager - [Proposal Management Screen]

Key Information

Proposal ID: Date Added: 7/27/2007 Last Updated: 6/15/2009
 Quoted By: Bid Due Date: Start Date: Proposal Status: Completed
 Project Name: Co.: Drawings In
 Customer: Multi-Contractor Bid

Print?	Add Date	Add Type	Description	Price
<input checked="" type="checkbox"/>	5/27/2009	Other	metallic paint	\$1,700.00
<input checked="" type="checkbox"/>	6/15/2009	Underlayment	underlayment description	\$1,500.00
<input type="checkbox"/>				

Additions Total: \$3,200.00

Estimate Totals

Proposal:	Furnish & Install:	\$76,220.00	Discount:	\$0.00	Adjusted Total:	\$76,220.00
Vol Alt:	Furnish & Install:	\$0.00	Discount:	\$0.00	Adjusted Total:	\$0.00

6/15/2009 11:09 AM

The "Exclusions" tab allows the user check off standard items that will not be included as part of the job.

The screenshot displays the 'Proposal Manager - [Proposal Management Screen]' window. The interface is organized into several sections:

- Key Information:** Contains fields for Proposal ID, Date Added (7/27/2007), Last Updated (6/15/2009), Quoted By, Bid Due Date, Start Date, Proposal Status (Completed), Project Name, Co., Drawings In, and Customer. A 'Multi-Contractor Bid' checkbox is also present.
- Navigation Tabs:** Includes 'Proposal', 'Voluntary Alternate', 'Additions', 'Exclusions' (the active tab), 'Inclusions', and 'Notes'.
- Exclusions List:** A grid of checkboxes for items to be excluded, such as 'No Scuppers and Related Accessories', 'No Gravel Stops', 'No Carpentry Work', 'No Cutting and Flashing for Light Fixtures', 'No Furnish Dumpster and Trash Removal from Site', 'No Copings', 'No Structural and/or Misc. Steel', 'No Translucent Panels', 'No Doors or Windows and Related Accessories', 'No Snow Guards', 'No Power Washing of Panels after Installation', 'No Waterproofing/Membrane/Felt', 'No Louvers', 'No Engineering', 'No Wood Blocking', 'No Shop Drawings', 'No Furnish Electric Power', 'No Vinyl Cladding', 'No Reinforcing of Openings', 'No Framing', 'Gutters/Downspouts and Related Accessories', and 'No Demo'. An 'OTHERS:' section with three text input fields is also available.
- Estimate Totals:** A summary table showing costs for 'Proposal' and 'Vol Alt'.
- Toolbar:** A row of icons for navigation and actions: First, Prev, New, Edit, Delete, Print, Email, Save, Cancel, Close, Next, Last.
- Status Bar:** Shows the current date as 6/15/2009 and time as 11:33 AM.

Category	Furnish & Install	Discount	Adjusted Total
Proposal:	\$76,220.00	\$0.00	\$76,220.00
Vol Alt:	\$0.00	\$0.00	\$0.00

The "Inclusions" tab allows the user check off standard items that will be included as part of the job.

The screenshot displays the 'Proposal Manager - [Proposal Management Screen]' window. The interface is divided into several sections:

- Key Information:** Contains fields for Proposal ID, Date Added (7/27/2007), Last Updated (6/15/2009), Quoted By, Bid Due Date, Start Date, Proposal Status (Completed), Project Name, Co., Customer, and a checked 'Drawings In' option. There is also a 'Multi-Contractor Bid' checkbox.
- Navigation Tabs:** Includes 'Proposal', 'Voluntary Alternate', 'Additions', 'Exclusions', 'Inclusions' (selected), and 'Notes'.
- Inclusions List:** A list of items with checkboxes:
 - Labor Type: **Prevailing Wage** (dropdown menu)
 - Freight
 - Delivery
 - Rental Equipment
 - Hoisting
 - Cleanup To Dumpster
 - Shop Drawings
 - Extended Weather Tightness Warranty
 - 1 Year Workmanship Warranty
 - 20 Year Paint Finish Warranty
- OTHERS:** Three empty text input fields for additional inclusions.
- Estimate Totals:**

Proposal:	Furnish & Install:	\$76,220.00	Discount:	\$0.00	Adjusted Total:	\$76,220.00
Vol Alt:	Furnish & Install:	\$0.00	Discount:	\$0.00	Adjusted Total:	\$0.00
- Navigation Bar:** Buttons for First, Prev, New, Edit, Delete, Print, Email, Save, Cancel, Close, Next, Last.
- Status Bar:** Shows the date 6/15/2009 and time 11:35 AM.

The "Notes" tab allows the user to maintain a set of notes related to the proposal; the notes are for internal purposes and are not part of the proposal document.

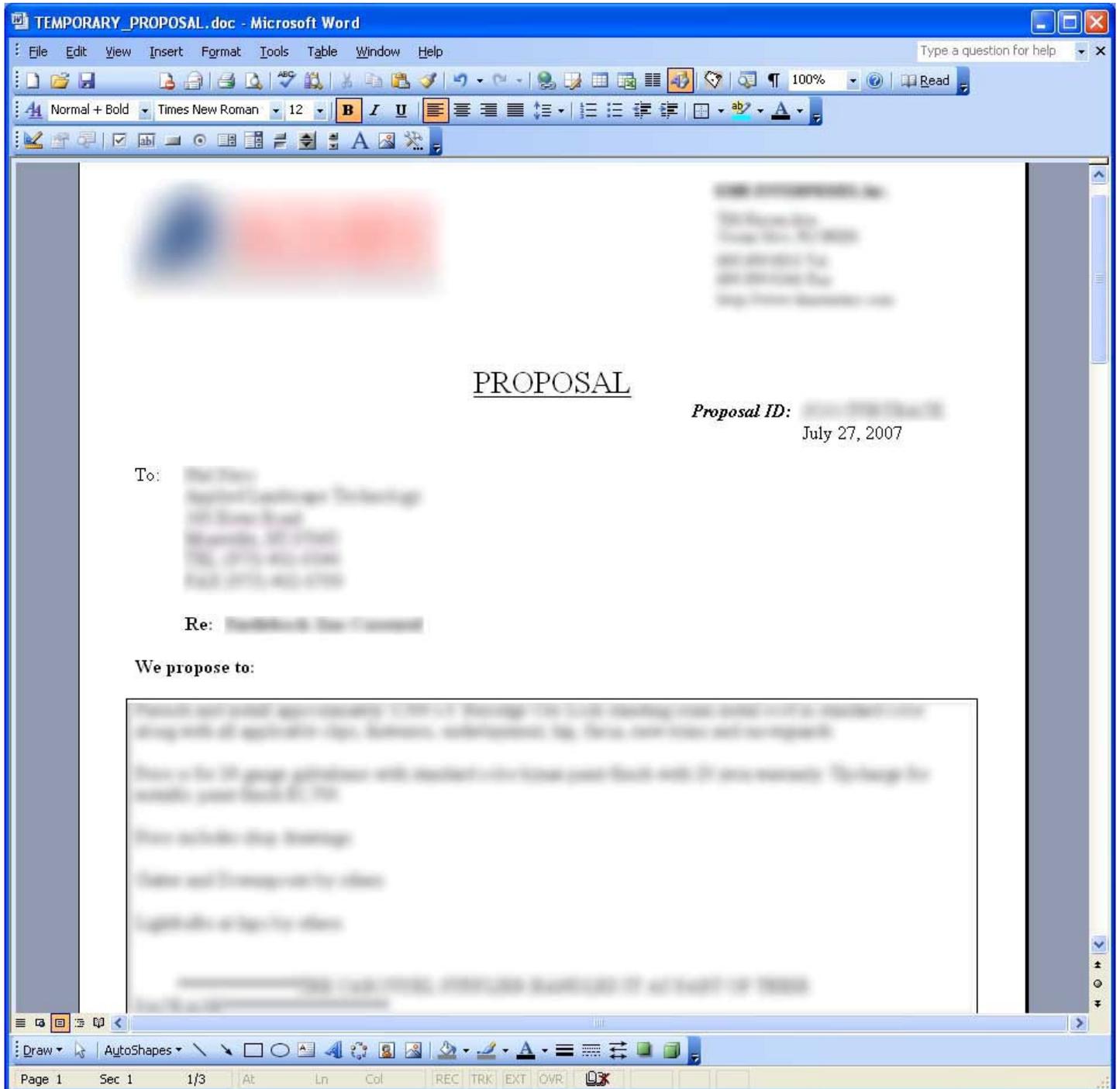
The screenshot displays the 'Proposal Manager - [Proposal Management Screen]' window. The interface is divided into several sections:

- Key Information:** Contains fields for Proposal ID, Date Added (7/27/2007), Last Updated (6/15/2009), Quoted By, Bid Due Date, Start Date, Proposal Status (Completed), Project Name, Co., Customer, and a checked 'Drawings In' option. There is also a 'Multi-Contractor Bid' checkbox.
- Navigation Tabs:** Includes 'Proposal', 'Voluntary Alternate', 'Additions', 'Exclusions', 'Inclusions', and the active 'Notes' tab.
- Notes Table:** A table with two columns: 'Note Date' and 'Note Text'. It contains two entries:

Note Date	Note Text
6/15/2009 10:45 AM	This is another one.
6/15/2009 10:44 AM	This is a test note.
- Actions:** Buttons for 'Add Note', 'Edit Note', and 'Delete Note' are located below the table.
- Estimate Totals:** A section with two rows: 'Proposal' and 'Vol Alt'. Each row has fields for 'Furnish & Install', 'Discount', and 'Adjusted Total'.

	Furnish & Install	Discount	Adjusted Total
Proposal	\$76,220.00	\$0.00	\$76,220.00
Vol Alt	\$0.00	\$0.00	\$0.00
- Navigation Bar:** A row of icons for 'First', 'Prev', 'New', 'Edit', 'Delete', 'Print', 'Email', 'Save', 'Cancel', 'Close', 'Next', and 'Last'.
- Status Bar:** Shows the date '6/15/2009' and time '11:36 AM'.

When the user has completed filling out the proposal details and is ready to send the proposal out, they can click on the "Print" button at the bottom of the screen, which will cause the proposal to open in MS-Word (the result of the information from the current proposal being merged with a pre-defined template):



File Edit View Insert Format Tools Table Window Help
Normal + Bold Times New Roman 12

INCLUSIONS

Table with 3 columns and 3 rows of inclusion items, each with a checked checkbox.

EXCLUSIONS

Table with 3 columns and 7 rows of exclusion items, each with a checked checkbox.

Any alteration or deviation from above specifications involving extra costs, will be executed only upon written orders, and will become an extra charge over and above the estimate.

Terms: to be discussed

Should you find this Proposal acceptable, kindly execute the Acceptance of Proposal and forward same to us for our file.

Please do not hesitate to contact us with any questions you may have. Thank you for your attention to this matter.

Respectfully submitted,

[Signature]

The **Customers** screen is shown below. A customer can be navigated to by clicking on the appropriate alphabetic tab at the top of the screen. Clicking on a customer in the list causes their detail information to be displayed in the main area of the screen. This screen also facilitates adding a new customer and updating or deleting the currently displayed customer.

Proposal Manager - [Customers]

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | # Search Results

71 record(s) found.

Cust ID	Customer Name	City	State	Phone #	Last Updated
170	ApexAire Technology	Portland	ME	(503) 233-2222	6/15/2009
171	Apex Contracting	Portland	ME	(503) 233-2222	11/7/2006
172	Apex Contracting Inc.	Portland	ME	(503) 233-2222	
173	Apex Contracting Inc.	Portland	ME	(503) 233-2222	
174	ApexAire Technology	Portland	ME	(503) 233-2222	11/7/2006

Customer ID: Customer Type:

Customer Name:

Address Line 1:

Address Line 2:

Zip Code: City: State:

Contact Name:

Phone: () - Ext: Fax: () - Email:

Alt Contact: Alt Phone: () -

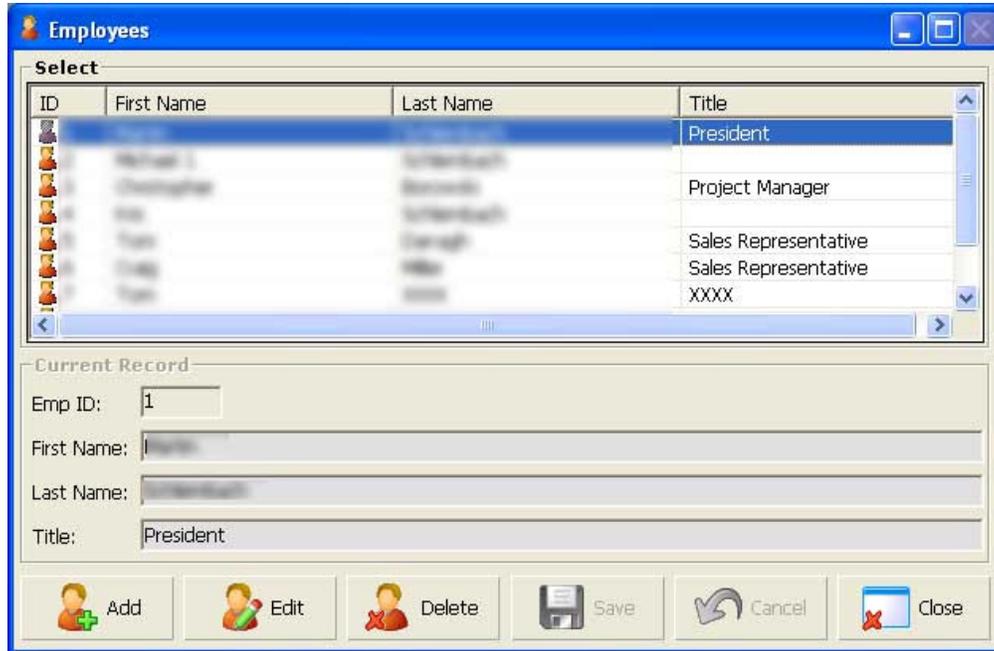
Sales Rep: Terms: Sls Tax Cd:

Notes:

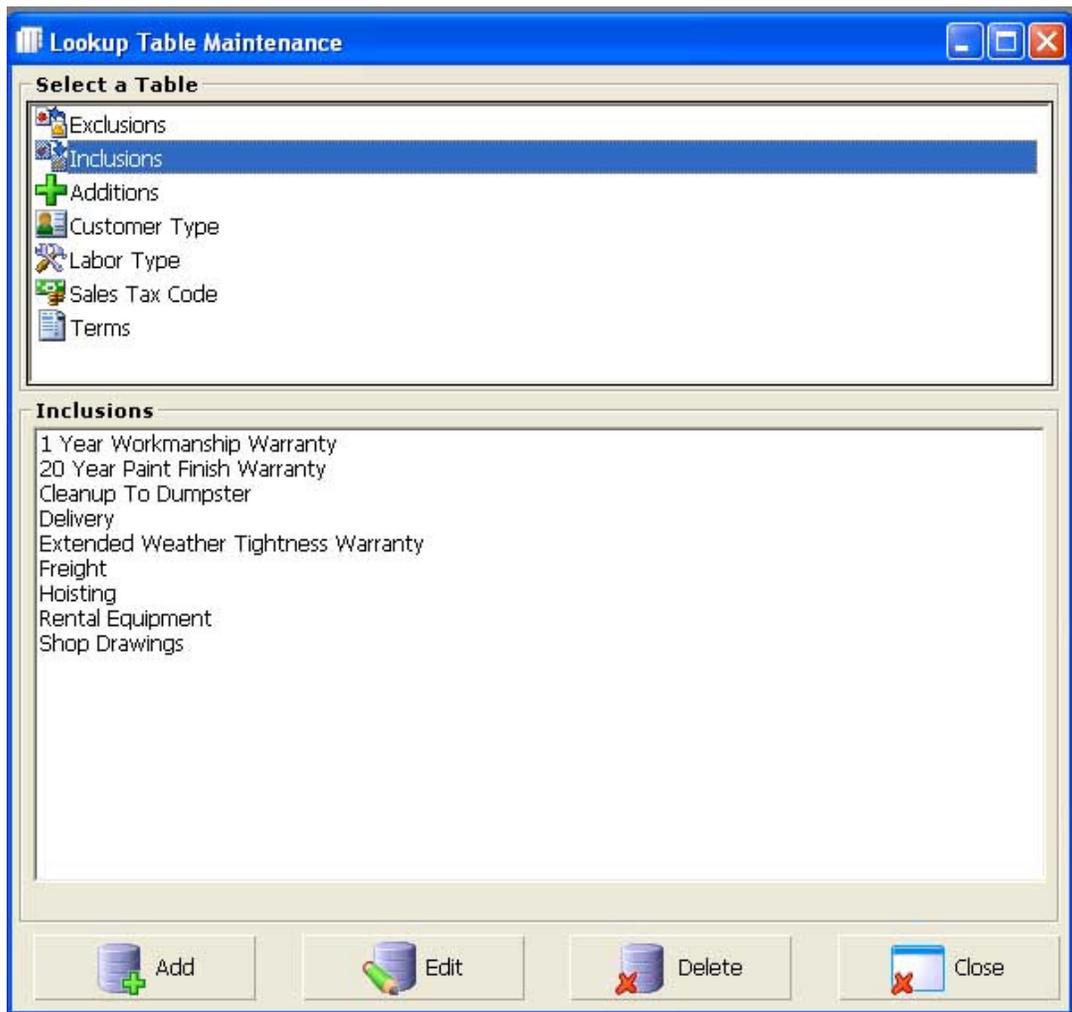
Add **Edit** **Delete** **Proposals** **Search** **Save** **Cancel** **Close**

6/15/2009 11:48 AM

The **Employees** screen allows for simple maintenance of the employees that work at the firm. Only first name, last name, and title are maintained.



The **Lookup Table Maintenance** screen allows the user to maintain various back-end tables (pick lists) used by the application.



The **Reports** screen presents the user with a list of various reports that can be run. Upon making a report selection, they are presented with the corresponding parameters to be set for the report:

The screenshot shows a Windows-style dialog box titled "Reports". It is divided into three main sections:

- Select a Report to Run:** A list box containing four items: "Bids Due By Date", "New Proposal Report", "Projects Awarded Report" (which is highlighted in blue), and "rptProposalsForDateRange".
- Report Parameters:** This section contains:
 - Company:** A dropdown menu with a small icon to its left.
 - Date Range:** Two dropdown menus labeled "From:" and "To:". The "From:" dropdown shows "6 / 7 /2006" and the "To:" dropdown shows "6 /13/2009".
 - Salesman:** A list box with a "Select All" button and a "Deselect All" button to its right. The list contains several entries, each with a checked checkbox. The top entry is highlighted in blue.
- Destination:** Two radio buttons: "Printer" (unselected) and "MS-Access Window" (selected).

At the bottom right of the dialog, there are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

Once the parameters are set and they click OK, the report is run via MS-Access:

Microsoft Access - [New Proposal Report]

File Edit View Tools Window Help Type a question for help

100% Close Setup

Projects Awarded Report by Salesman

for Period 6/7/2006 to 6/13/2009 Company: **MSB**

Proposal ID	Project Name	Dollar Amount	Date Awarded
Salesman: Brough, Paul			
06-2006	Concrete Deck	\$56,600	10/31/2006
06-2006	Handicap Washroom	\$16,200	12/6/2006
06-2007	Office Lounge Building	\$0	2/6/2007
06-2006	Water Bar	\$80,000	10/15/2007
06-2006	W/10,000 Washroom	\$56,500	12/17/2007
06-2006.1	W/10,000 Washroom	\$59,000	4/17/2007
06-2006	20' South Walk	\$31,200	5/10/2007
06-2006	Handicap Business Center	\$0	5/16/2007
06-2006	Concrete Business Center	\$42,900	6/16/2007
06-2006.1	W/10,000 Washroom	\$54,000	8/6/2007
06-2007	Competition Deck	\$13,200	8/16/2007
06-2006	20' South Walk (1/16)	\$34,885	8/29/2007
06-2007	W/10,000 Washroom	\$62,000	9/27/2007
06-2006.1	Handicap Building - Front Deck	\$146,200	10/2/2007
06-2006	Track Deck - English Course	\$7,200	10/3/2007

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