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 **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.)

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.

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

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: T   Co.:   ☑ Drawings In

Customer: ☐ Multi-Contractor Bid

Tabs: Proposal | Voluntary Alternate | Additions | **Exclusions** | Inclusions | Notes

☑ 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   **OTHERS:**

☑ No Wood Blocking   ☐ No Shop Drawings

☑ No Furnish Electric Power   ☑ No Vinyl Cladding

☑ No Reinforcing of Openings   ☑ No Framing

☑ Gutters/Downspouts and Related Accessories   ☑ No Demo

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   11:33 AM

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

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.

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):
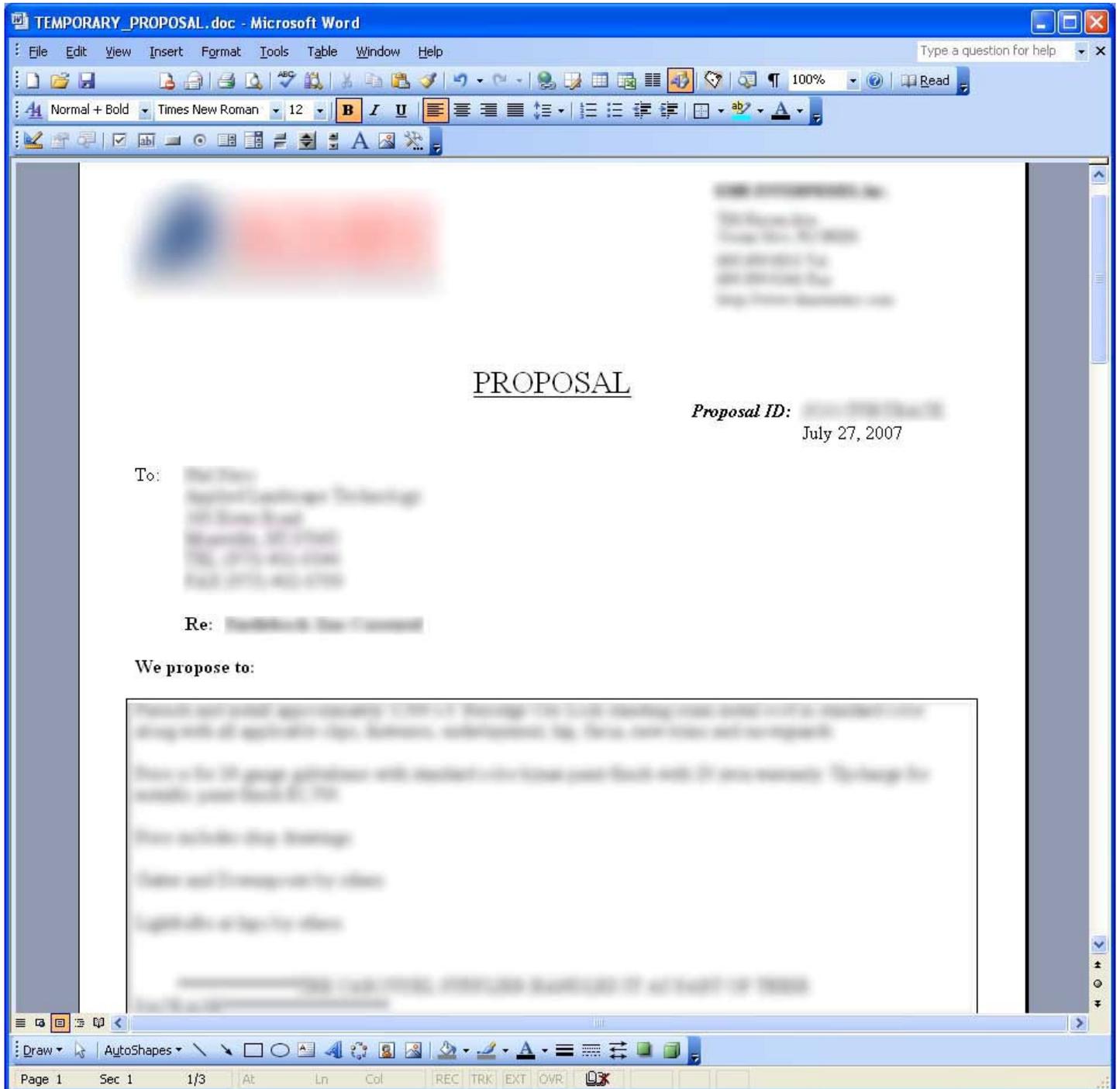
INCLUSIONS

☒ Labor Type: Prevailing Wage	☒ Freight	☒ Delivery
☒ Rental Equipment	☒ Hoisting	☒ Cleanup To Dumpster
☒ Shop Drawings	☒ 1 Year Workmanship Warranty	☒ 20 Year Paint Finish Warranty

EXCLUSIONS

☒ No Scuppers and Related Accessories	☒ No Cutting and Flashing for Light Fixtures	☒ No Structural and/or Misc. Steel
☒ No Doors or Windows and Related Accessories	☒ No Power Washing of Panels after Installation	☒ No Louvers
☒ No Wood Blocking	☒ No Furnish Electric Power	☒ No Reinforcing of Openings
☒ Gutters/Downspouts and Related Accessories	☒ No Gravel Stops	☒ No Furnish Dumpster and Trash Removal from Site
☒ No Translucent Panels	☒ No Engineering	☒ No Vinyl Cladding
☒ No Framing	☒ No Demo	☒ No Carpentry Work
☒ No Copings		

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,

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 displayed in the main area of the screen. This screen also facilitates adding a new customer and updating or deleting the currently displayed customer.

The **Employees** screen allows for simple maintenance of the employees that work at the firm. Only first name, last name, and title are maintained.
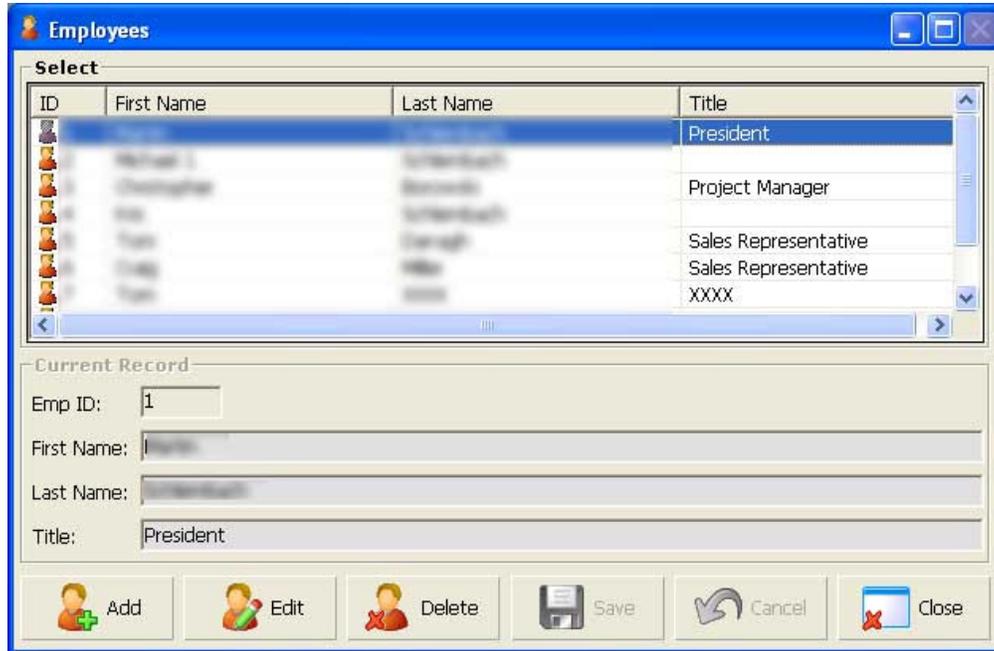
The **Lookup Table Maintenance** screen allows the user to maintain various back-end tables (pick lists) used by the application.
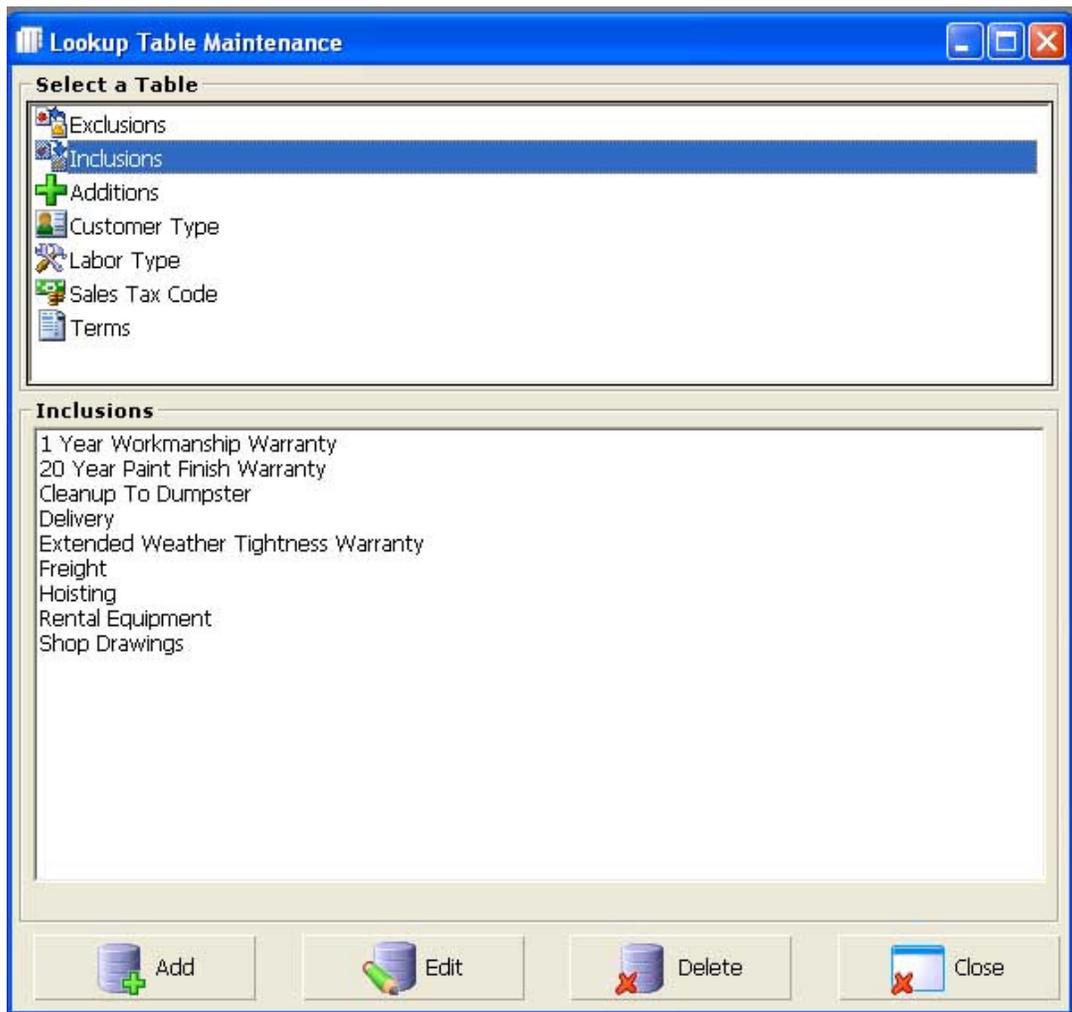
The **Reports** screen presents the user with a list of various reports that can be run. Upon making a report selection, they are presented with the corresponding parameters to be set for the report:

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

100%

Close | Setup

Projects Awarded Report by Salesman

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

Proposal ID	Project Name	Dollar Amount	Date Awarded
Salesman:			
		$56,600	10/31/2006
		$16,200	12/8/2006
		$0	2/8/2007
		$80,000	10/15/2007
		$56,500	12/17/2007
		$59,000	4/17/2007
		$31,200	5/10/2007
		$0	5/16/2007
		$42,900	6/18/2007
		$54,000	8/8/2007
		$13,200	8/16/2007
		$34,885	8/29/2007
		$62,000	9/27/2007
		$148,200	10/2/2007
		$7,200	10/3/2007

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Ready