

Projects Tab and Project Functionality

Projects are only visible if the Projects option in Operational #183 is enabled.

There are three main tabs in the Booking Grid. The tabs are located just above the scope bar at the bottom of the Booking Grid window. The third tab, Projects, displays all projects in the system. Projects are a means to group bookings together for a single event or show.

Create a Project

In the projects tab click **New Project**. The project code is a unique identifier and allows bookings to be assigned to the project. The project description will be used on various reports throughout the system. The calendar dates are a general guideline that operators can use when assigning bookings to the project, these dates will not be used on the assigned bookings. Venue information is also a general guideline, individual bookings can have their own venue.

Click **OK** to save the project. Upon saving, a prompt will ask you to assign a booking to the project right away. Clicking Yes will open a new booking with the project code and project description automatically entered in the Other Details tab.

You don't have to assign a booking right away. The project will still be saved in the system and available for later use.

The screenshot shows a 'Project' dialog box with the following fields and sections:

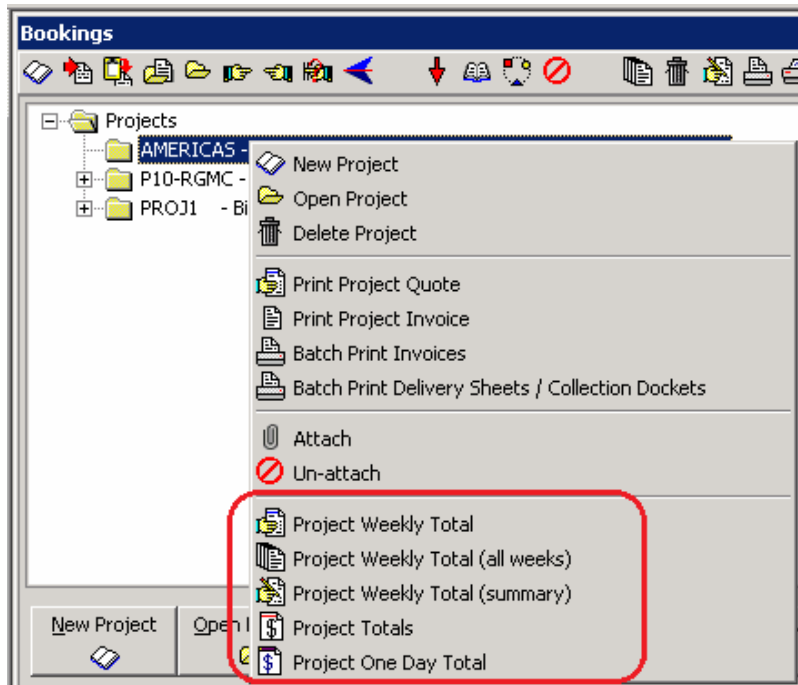
- Project Code:** CONF2013
- Project Description:** 2013 Budget and Marketing Conf
- Expected Attendees:** 50
- Bookings in Project Invoiced:**
 - Bookings Individually Invoiced
 - One Invoice for Project
- NOTE:** When invoicing a Project, taxes from the customer being invoiced will override any and all taxes entered on the bookings within the Project.
- Calendar:**
 - Warehouse Out Date: 4/ 7/13, Time: 1300
 - Show Starting Date: 4/ 8/13, Time: 0900
 - Show Ending Date: 4/10/13, Time: 1830
 - Warehouse In Date: 4/11/13, Time: 1145
 - Days Using: 4
- Venue Information:**
 - Venue, Delivery Address
 - Name: Entredea Supply Inc.
 - Address: 912 Ruberta Ave.
 - Suburb:
 - City: Walkerville, State: OK
 - Country: USA, Postal Code: R5T 3E6
 - Contact:
- Phone/Fax:**

	Country Code	Area Code	Number	Extension
Phone 1	1		206-619-4732	
Phone 2	1		702-453-9828	
Fax	1		7144709461	
- Discounts:**
 - Rental Discount Rate: 2.5000
 - Sales Discount Rate: 7.0000
- Salesperson:**
 - ST - Steve Banks
 - Coordinator: TO - Tina Oberlang
- Text Area:** All equipment managed through Tina, contact cell for inquiries.

Buttons:

Project Reporting

There are various reports available in the Projects tab. These reports will total all bookings within the project and breakdown the totals based on the report you select.



For example, the **Project Totals** report is quick and simple for easy calculations. It displays the total amount of each booking within the project as well as any sub rentals or purchase orders that are associated with the project.

Printed 07/18/08 Project totals report for project CARNIVAL
 Project Description: Southwestern Carnival page :1

BOOKINGS AND QUOTES			
Booking #	Customer	Order No.	Total
Bookings			
BURBUR00002	Burned Lights Inc		28,408.43
RIGHTWAY00001	Reliable Rentals		96,778.92
Total bookings :			CAN 125,187.35
Quotes			
Total quotes :			CAN 0.00
Sub rentals			
Booking #	Sub rental company	Order No.	Total Value
Total Sub rental			
Total Value :			CAN 0.00

Project Quotes and Project Invoices

The Project Quote and Project Invoice options use a custom template. You can create your own custom template by using the insert field module in Word. Due to the complexity of the information being displayed, insert fields for a project template are somewhat limited. A listing of available insert fields can be found in the Template Insert Fields folder in the knowledgebase. Below is an example Project Quote.

Estimate

Date: July 18th 2008
Our ref: CARNIVAL

Burned Lights Inc
 956 Coronation St. S
 Suite 2
 Kitchener H8H 6G6

Plant Essentials
 139 Columbia St.

Henley, BC 1
 Phone 1: 484 698-7459
 Phone 2: 1 484 698-7462 & 2DELE&
 Fax: 1 484 698-7465

Attn: John Chuck

Thank you for your inquiry, this is our estimate for the event :Southwestern Carnival held over the period :February 2nd 2006 to December 30th 2006.

Date:	Category:	Product Name:	Qty:	Unit:	Extended:
RIGHTWAY00001	Canadian Music	Awards		CAN	19,800.10
02/20/06	AUDIO	ETC Source 4 Head Option 5/10 degree	2	270.00	6,200.00
	AUDIO	Isco 45mm Pc Zoom Lens	1	300.00	900.00
	AUDIO	Dataton Mictouch Panel	1	130.00	390.00
	AUDIO	Dataton PC Smart link	1	160.00	480.00
	AUDIO	Daton Touch Link Remote Panel	1	180.00	540.00
	AUDIO	Daton Trans Pax Control	1	210.00	630.00
	AUDIO	USB Disk Drive	1	230.00	690.00
	FLEX	Flexset A 1.7m x 1.3m (6x4) - 2.6m high	1	17.50	25.00
	FLEX	Flexset B Recovering Charge	1	10.00	30.00
	FLEX	Flexset Tribunal Desk 6 Person 3m Wide	1	52.00	156.00
	FLEX	Panels - Blue/Grey 2.4m x 1.2m	1	850.00	500.00
	FLEX	Monitor Hide Sony 2130 PVM	1	10.00	30.00
	RIGGING	Lodestar Motor Controller 4 way	1	240.00	720.00
	RIGGING	ENG Magni MM410	1	280.00	840.00
	RIGGING	1tonne manual chain hoist	1	300.00	900.00
	RIGGING	20kg Luminaire Safety Bonds	1	410.00	123.00

Anterior Ballroom

RIGGING	600mm Polywrap	1	430.00	1,290.00
RIGGING	Unistrut fitting to std hook clamp (not	1	500.00	150.00
RIGGING	Media Projector	1	520.00	156.00
V-PROJ	250 Zoom Lens Adapter	1	200.00	3600.00
V-PROJ	CT Double Hanging Bracket	1	10.00	300.00
V-PROJ	Sanyo PLC-XF30 XGA LCD Projector	1	123.55	376.50
V-PROJ	Sharp Lens 0.9 (LV18)	1	500.00	105.00
V-PROJ	Sharp Lens 1.2- 1.4:1 (LV26)	1	500.00	105.00
V-PROJ	Sharp Lens 3.8 - 5.3:1 (LV80)	1	37.82	113.60
V-PROJ	Unicol Flat base Stand for Plasma	1	150.00	450.00

Subtotal for Day:

19,800.10

Discounts and Taxes

When printing quotes and invoices, you can choose to either use project discounts and taxes or booking discounts and taxes. The system generates a single piece of paperwork for your client with totals from all booking in the project.

The **project discounts** are setup in the project properties and will override all booking discounts. The **project taxes** will come from the customer that you choose to invoice; you select this customer before printing the invoice. The customer's default taxes will override any taxes selected in the individual bookings.

If you select the option to use **booking discounts and taxes** in your printout, the system will use the discounts and taxes from each booking assigned to the project.

Details for Printing Project - P10-RGMC - RGMC2011 conference

Organisation Details to Use

ADVA2287 ActiPro

Print Options

Discounts and Taxes

Use Discounts From Project and Taxes from Customer Selected Above

Use Discounts and Taxes From Bookings

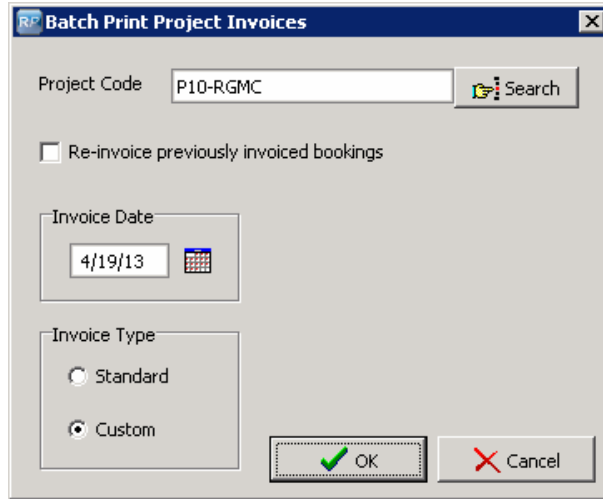
Note : Selecting 'Use Discounts From Project...' will apply the project rental discount and project sale discount to the equipment totals. It will also apply the taxes from the selected customer to the totals. This option overrides any discounts or taxes on the individual bookings. Select 'Use Discounts and Taxes From Bookings' to keep the individual booking discounts and taxes and ignore the project discounts and taxes.

OK Cancel

Project Batch Printing

A Batch Print can be run on any projects that are setup as Bookings Individually Invoiced. The Batch Print option invoices each booking in the project and saves the operator time of tracking down each booking individually.

Right click a project and select **Batch Print Invoices**. Select either a Standard or a Custom Invoice. If applicable, tick the option to Re-Invoice previously invoiced bookings. Re-Invoicing will credit the previous invoice and issue a new one. Click **OK** to print.



The screenshot shows a dialog box titled "Batch Print Project Invoices". It contains the following fields and controls:

- Project Code:** A text input field containing "P10-RGMC" and a "Search" button with a magnifying glass icon.
- Re-invoice previously invoiced bookings:** A checkbox that is currently unchecked.
- Invoice Date:** A date input field showing "4/19/13" and a calendar icon.
- Invoice Type:** A group box containing two radio buttons: "Standard" (unchecked) and "Custom" (checked).
- Buttons:** "OK" (with a green checkmark icon) and "Cancel" (with a red X icon).