Projects Tab and Project Functionality

Projects are only visible if the Projects option in Operational #183 is enabled.
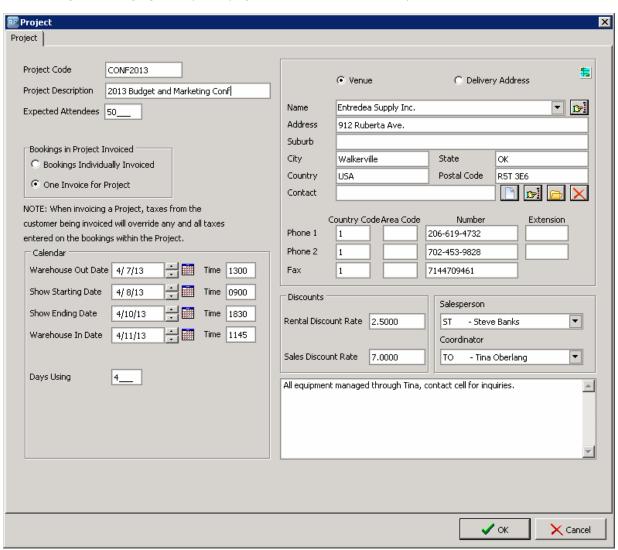
There are three main tabs in the Booking Grid. The tabs are located just above the scope bar at the bottom of the Booking Grid window. The third tab, Projects, displays all projects in the system. Projects are a means to group bookings together for a single event or show.

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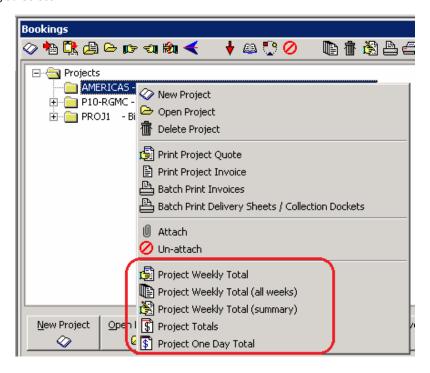
Click **OK** to save the project. Upon saving, a prompt will ask you to assign a booking to the project right away. Clicking Yes will open a new booking with the project code and project description automatically entered in the Other Details tab.

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

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.
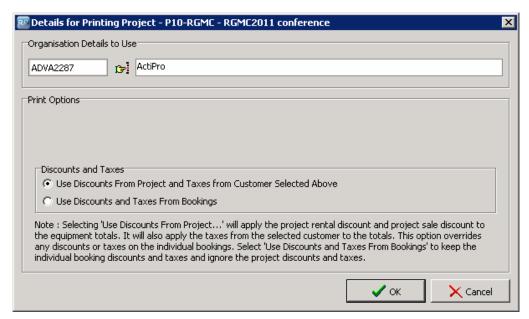
Date:	Category:	Product Name:	Qty:	Unit:	Extended:
RIGHTWAY00001 Canadian Music Awards				CAN	19,800.10
02/20/06	AUDIO	ETC Source 4 Head Option 5/10 degree	2	270.00	6,200.00
	AUDIO	Isco 45mm Pc Zoom Lens	1	300.00	900.00
	AUDIO	Dataton Mictouch Panel	1	130.00	390.00
	AUDIO	Dataton PC Smart link	1	160.00	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 Saftey 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.

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.