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Training Videos: Training Videos: www.dovenet.com/trainingclasses3.htm or www.dovenet.com/trainingclasses5.htm

The Project System®

ON-Site Training

Top Menu

Track & Locate projects with ___List & Status___

Start a New Project or Service Ticket or Maintenance Contract with ___New Project Button___

To list all Projects in company you need Master Check Box ___ON___

To see only a single salespersons list of projects you need Master ___OFF___

Other Notes about Top Menu

List & Status

To list projects for a single Status select Select Status ________________________ and press Begin Button ______________

You can also select a single status of projects by Double Clicking on the status ____

To list all Project Selecting All Project Check Box ___________________ and press Begin – This will let you find a project that you u have lost. ____________________

To list all Project Select All Project Check Box ___________________ and Enter Statuses to be selected in the field

____ Status __________ and press ____ Begin ____

To select list of a specific customer select Customer Name _______________ enter search data in the field

____ Info _______________

and press Begin Button __________________

Additional field selections can be made by Selecting various options and then Press

__ Begin Button __

To select money report, check the Value Report ______________________ Check box and continue with

Other selections and press ____ Begin Button _____

To print WIP or Forecast report, Select All Projects _________________, Select Active Job Statuses _______________________, Select Value __________,

_ Special Sales, Com., Wip __ , __ Wip ___ Press ___ Begin Button ___

To save a report of select, make select and then enter name report in Save Screen Personal _______________________ Field and press the ______ Personal ______ Save Button or for Corporate Level Report press the __ Corp. ___ Save Button.

New Project

Select New Project to create a new Quote, Service Ticket or Maintenance Contract Project

Select Type of Sale (Product Code)

Un-Check Auto- Number when Manual enter a Project Number

The Replicate Button is used to copy a Project including the Customer Name and Ship Address

On the Customer Locator screen, you can locate customer by ID. Company Name, Phone, Customer Code, etc.

The System remembers the Previous setting you select.

Use the Customer Locator field to type the customer name in and the system will jump to that customer.

You can select the customer with 4 ways. Select Customer, Double Click on the record, Enter Key on the record, Alt 4 Key

To Add a customer press the Add button. To Edit a customer press the Edit button.

Use the Memo button to store Or see Notes about this customer.

If you establish a ship to address for the customer on the customer screen, then you can add additional ship to address by pressing the Ship Add button.

New Project Entry Screen

The Blue or Aqua fields must be filled in.

The Special Address fields Supersedes the Customer Address Fields.

The A/X Lines are used for Service Ticket Additional Lines to more notes, A – Print Everywhere, A - Service

The Date Due field can be used for Sales – Due Date for when Quote is due (Use List & Status for Listing)

And Due date for Service Ticket (Use List & Status for Listing)

On the New Project Complete Menu

The Print Project check box is used to print Work Sheet or Survey Forms and Service Tickets forms.

The Copy Project Button copies the Project Without Customer Name.

Add Customer

ID Creation and Rules	Let auto create unless for very special reason or abbreviations.
Billing Address Type	Billing Address, Billing Code, Ship Address, or just data Fields
Credit Status	Hold or Credit Hold
Accounting ID Field	Use to communicate with Accounting other than Code.

The Project Editor Screen

To get to the Help Screen, put yourself in the Red box and Press F1 key.

The “A” line is for Text line that can have up to 64 characters. Prints Everywhere.

The “M” line is for Memo Line. (Unlimited Length Memo Field that prints Everywhere.)

The “P” line is for An Inventory Line Item for Pricing and later on Inventory purposes.

The “E” line is for Like a "P" line used as a Catch All Line.

The “L” line is for Labor Line (Quantity of hours Printed on a Proposal) Mostly used for Service.

The “C” line is for A Text Line Plus a Dollar amount at the end (Installation, Training, etc., $5,000.00).

The “P - LBR” line is for Part number starting with LBR and then enter things like TECH, LABOR, (Description + Price A)

The “U” line is for A comment line that only prints on a Work Sheet. (Un-Printed Line)

The “S” line is for Sub-Total line. (See Menu when you press the “S” Key.)

The “Q” line is for A Quoted Line that is not added into the Total of the Project.

The “X” line is for A line that only prints on a Service Ticket and a Work Sheet (Internal Office Document)

The “Z” line is for Forces a Page Break when printing a Proposal.

Project Editor, Parts Listings

To List all the Manufacturers enter into Project press the P Key and then press the F3 Key.

To List all the items under a Manufacturers, press the P Key then enter a manufacturers ID, and then a portion of the part number and then press the F2 key.

To select the item on the Parts List screen, press the Enter Key or Double click on the List.

You can edit the Qty, Description, Cost or Sell Price by Enter through the line and edit the fields

Or If you are in the M field, you can use the mouse key and drop in the field to edit.

To Re-calculate the markup or margin on all P lines, Change the Markup Rate and then press The Re-Cal button and then Press Continue Button

To copy and Paste a line or series of lines, select lines with the Very Left column and press the Copy Button or press Control C.

To paste the lines, Put your mouse in the very Left field where you want the data pasted and then press Paste button.

Press the Inventory Button to see the Inventory Screen for the part. Also see the Vendor Button.

To edit the Project Customer or Ship Address or Taxes, press the Heading Button.

To edit Editor Options or set a Freight amount, press Setup or Freight Button.

To Print a Project, press the Print Button.

To Change the Status of a project, press the Status Button.

To Store additional contacts related to the project, press the Ext. Data Button.

To Sort the Project by Part Number, check the Sort By Part Number ____________________________ Check box.

To Show the current Inventory Levels on each item select the Sort by Part Number ____________________________ Drop Down.

The Re-Total button is used for Put the Totals for Sub Total Lines. ____________________________

Making sure the Total on the Project is correct. You can get ahead of the editor. The system will Re-total on Exist.

Steps to Turning an Estimate into a Project:

______ Clear up Editor to reflect what customer is purchasing. Q Lines, Items the customer did not purchase.

______ Correct Heading Section for the Correct Customer, Purchase Order, Tax Code, Etc.

______ Set Fixed Price

______ (Maybe) Re-Number project

______ Print Work Sheet and Proposal

______ ____

______ ____

Purchasing

F2 Key ____ Allocate Inventory for this Item, Order the item if not in-stock

Shift F2 Key ____ Un-Allocate Items back to Inventory

F4 Key ____ Allocate all Items to this Project, Order any Items that are not in stock, Continue with Rest Or Project.

In Billing Mode, the F4 select all items for invoicing.

Shift F4 Key ____ Un-Select Items from Invoices, Un-Allocate all Items from this Project

F5 Key ____ Do not use Inventory, Order this Item "P" or "E" lines.

Shift F5 Key ____ Cancel the Order of this Item. Removes Item from PO if Status is 0 or 4

Dedicated Purchase Orders ____ Only Item on this Project will appear on a single PO.

Group Purchase Orders ____ Multiple Project on one PO – No Suffix or Project on the PO #

Re-Use Existing Purchase Orders ____ Allows you to enter the PO # that you want to use. (Must already exist.)

Alternate Vendor ____ This selection allows you to choose a different Vendor than the Default.

Receive Purchase Orders

Line by Line: Receive in Full, Partial Receive

Receive Complete – All Items have come in. Receive Line by Line.

Packing Lists

F6 Key ____ Select this line to the Packing List. (Items must be allocated first.) Press Exit Project to Print.

Create Invoices

Top Menu, Billing Menu, Create Invoice from a Project

On the Billing Screen, nothing is save back to the Project accept the Purchase Order #

F3 Key ____ Select this line to the Invoice. Depending on Setup, if not allocated, the system will Allocate first.

Shift F3 Key ____ Un-Select the item from the Invoice.

F4 Key ____ Select All Line to the invoice.

Shift F4 Key ____ Un-Select all lines from the Invoice.

Add Part

Deposit