Design Projects 3 – Participants

Thank you for enrolling in Design Projects 3 for Studio Designer. Please feel free to ask questions as they arise. If we start running short on time, we may hold off on some of them and have a 5-10 minute session available after the class to answer any questions.
We ask you to be considerate of others, so please do NOT use a speaker phone at any time during the class. Although it sounds fine to those using the speaker, the static is multiplied many times to all other participants. You can have as many people as you like call into the conference number to listen in. Also, please mute your phones whenever possible to cut down on background noise.

This is Design Projects 3

We'll cover how to use:

- Expediting features and understanding the difference between expediting by item and expediting by PO.
- Client budgets by item, room/area, and project
- Item codes (user defined) to help you extract specific items in your reporting
- Finish Codes that can be updated for all items that they are assigned to in one place
- Templates to prompt you for specific information based on the sales code you choose
- The paperless office to store and access client documents and correspondence
- Custom room lists for each client
- Catalog to store details about commonly used items

This class assumes that you are comfortable with the design items process. Most of the functions that we will cover today are going to be independent of the others, so you will want to take notes.

Expediting

Expediting in Studio Designer is used to keep track of important dates and information that helps you keep on top of where your items are and when they are expected to and actually arrive at their destinations.

- PO – the purchase order holds information relevant to ALL items included on that PO
    - Accessible from:
        - The main PO list
        - By clicking Expediting from the PO list – within the list at the top of the screen
        - PO Check Vouchers – within the list at the top of the screen
    - **All information entered on the main PO flows through to each item on the PO that does not already have the corresponding field completed.**
    - If **all** items on a PO will ship together, enter the information on the PO which will automatically complete the information on the item
    - Updating the PO **does not** update the corresponding fields on the individual items. You must do this manually.
- Item – the item holds information about this item as an individual
    - Accessible from:
        - Within the PO at the bottom of the screen. The current selected items details are visible.
        - At the bottom of the Expediting screen
        - Within Design Projects by scrolling to the right
        - Within the Item on the Payments tab
        - PO Check Vouchers – at the bottom of the screen
    - If items on an order will **split ship**, enter the information directly onto the item
- Most default reports print expediting information from the PO
- If the PO will split ship you can enter multiple vendor invoice #'s on the po and separate by commas. Then you can Find or Filter (using *) for either number.

Client Budgets

From within Design Projects, budget numbers are entered into the budget fields on items. To enter a budget by:

- Client
  - Create one item. Room 000 (Client budget) and enter the entire budget into the budget field.
- Room
  - Create one item in each room. Examples:
    - Room 001 Item 000 Comp A
    - Room 015 Item 000 Comp A
    - Room 019 Item 000 Comp A
- **View budget totals:**
    - **Click F11** scroll to the right to view the Budget Total and Selling Total
    - **Preview report 2020 05 Project Profit Analysis**

- If a client doesn't have a budget, the budget field can be used to track original pricing when pricing changes. Then the budget report will show the difference between original cost vs final cost.
  - You must manually enter the original cost into the budget field

Custom Room Lists

- Room's can be used in many ways. If you need to have certain items stand out, place them in a special room, at the top of the list.
- Room 999 – Cancelled items. This automatically moves all items that I know that the client will not be using to the bottom of my design projects.
- Go to Files | Rooms, enter the client to create the room list for. Click copy to:
- Rooms can also be alphabetical. Do not have to be numerical.

Codes

Item Codes are user defined and can be used for various purposes.

- Open an item in Design Projects
  - Click the box next to Code 1 to open the list
  - Example:
    - PROPOSED
    - INVOICE
    - ACCEPTED
    - DECLINED
- Suggestions:
  - Could be used to group many items on various proposals to create a summary for the client using PW Summary by Proposal # for client (or any other report)
  - Some clients have a worksheet created to look like an invoice, they choose INVOICE on the items that they are ready to ship and then print this custom worksheet to send to clients as an invoice. That way they can wait until they have freight $ and know that everything is complete on the items before they actually create the final invoice.
  - Code 2 might be used to specify product types, like ANTIQUE, or COMMISSION (for items that they expect to receive a commission from a vendor), etc.

Finish Codes – allow the user to create a list of finishes, colors, etc. for a project and assign those codes to items. They can be generic and used for various clients/projects or they can be created and assigned to specific clients.

- Click the box next to Finish to open and add to the list. Examples:
  - DISTRESSED (leave the client and project blank) enter description: Distressed finish. Will be available to all clients.
  - FAUX1 (enter a client) enter description: Base of Blue #45899 with Gold #77895 staining in slight circular motions. Will be available only to the client entered.

Templates give you the ability to have additional description lines automatically added to each new item as they are created based on the sales code that is entered.

- Create a vendor named TEMPLATES
- Open the catalog and add a new item. Example:
  - Make the vendor TEMPLATES
  - Type FABRIC (sales code) in Product #
  - Leave Sales Code, unit and the main description line blank
  - Add additional description lines
    - Pattern #:
    - Repeat:
    - Dye Lot #:
- Create a new Item in Design Projects and use the sales code FABRIC to see the description lines prompting the user for input.

Catalog

The catalog allows you to store item pricing and details about frequently used items. You can enter a manufacturer's price list, or if you like, Studio Support can import price lists provided in an Excel format.

- Enter an item into the catalog with pricing and additional description lines.
- Open Design Projects and create a new item, select the product# from the catalog and the item will automatically populate with information from the catalog.

Paperless Office

The Paperless Office allows you to store and open various types of documents within Studio Designer.

- You must create a folder within the Studio Designer folder on the server and name it CLIENT.
- Within the CLIENT folder you must create a folder for the client named the Client ID. Example: DOUGLAS
- Place documents into the folder for the appropriate client.
- Open Studio Designer, go to Design Projects and enter your Client ID.
- Click Paperless Office to see the documents.
- Click on the document and then click Open.