Design Projects Basic – Participant

Thank you for enrolling in Design Projects 2 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 class focuses on basic functions used by the Interior Designer.

We'll cover how to do the following:

- Enter new items and edit existing items
- Create proposals, purchase orders and invoices
- Use spell check
- Use images with items
- Find, filter, sort and prioritize
- Use time billing
- Use activities and groups within time billing
- Add new address (clients, vendors, etc.)
- Rename Addresses (clients, vendors, etc.)

- Item based program- Enter the item 1 time and "attach" applicable information to that item. All $ are attached to specific items.
  - The Design Projects screen – **must be in Design Projects to create anything new**
  - Filtering – Used to narrow items viewed on the screen
    - Use * as wildcard
  - Lookups (**arrows down**) vs **boxes** that open lists and allow filtering
    - Click the box below client to open the client list
  - Organization = Room/Item/Component – by default
  - Sorting – Use the A-Z and Z-A to within a column to sort
  - Color Coding – User defined,
    - Click to change the color of an item
    - Click the color at the top of the list to filter for that color
  - Accessing and editing existing items
    - Click **view to open** an existing item
    - Click the **box** beside a proposal or po to open the form
  - Use the arrows to scroll back up the screen and view other items
  - **Components** – Avoid leaving components blank
    - 001 001 A = Sofa
    - 001 001 B = Fabric
    - 001 001 C = Trim

- Create a new item. Click **ADD** to create (see Add and Delete at top right)

  Quote 001
  - Items increment within the room automatically
  - Enter **Component A** (must manually enter the component)
  - **Sales code** – Covered in Video training: Setup and Defaults (determines how income and expenses are classified
  - Codes and Specifier are covered in subsequent classes
  - **Description**-Main line should be descriptive enough to pull it out of the main design project list screen, but details should be entered in additional description lines.
    - **B=Both**, **V=Vendor** (PO), **C=Client** (Proposal/Invoice), **D=Designer** (notes only)
  - **Purchase cost** fills into selling cost based on defaults. Covered in another class. Our sample database is set to carry over into selling only when purchase cost is 0.00. Manually edit selling cost when editing existing purchase cost

    - **Markup %** can be blanked out and a specific amount can be entered.
- **Taxable Yes/No**
- **Deposit percent.** The % can be removed and a specific amount can be entered just like the markup on the selling cost.

Quote 002 – Example: Enter Fabric as **Component B**

- **Spell Check**
- Attach an **image-** Images are stored in Studio Designer folder on server
- Create a **proposal** – Shift-click to **preview**
- View the proposal
    - **1st component** only – Shows description of first item and adds costs of all components
    - Email (Default is SNP and cannot be changed)
        - RTF = No graphics (logo's, lines, etc.) Nothing needs to be installed on the client computer to view.
        - SNP = As printed. Viewer must install the Snapshot Viewer (link is provided on the email message)
- Create a **Purchase Order**
    - **Notes** – Internal only
    - **Special Instructions** – Shows on PO
        - Same on Proposals and Invoices as well
- Create an **Invoice**

- Locate, view and edit the purchase order from the purchase order list screen
    - Can do the same thing from Proposal and Invoice lists

- **Time Billing**
  - **Filters** – remove the automatic filters and explain
  - Add a new entry
    - Groups – Senior Designers / Junior Designers / Administrative, etc
    - Activities – Client Meeting / Drafting / Expediting, etc.
      - Add a new activity to the list
    - Billing – B=Billable, N=NonBillable (will show up on invoice at 0.00), O=Office (will not show up on invoice, in-house use only)
  - Add an additional entry
  - Create an invoice for both entries
    - Selection – explain – using filters, date ranges and space bar to select/unselect.

- **Entering new Addresses**
  - Some fields used for clients, some for vendors. See class materials for details
- Add a new client
  - Site = Ship-to, Mailing = Proposals, PO's, Invoices, Checks, etc.
  - Completes mailing automatically only the first time entered
  - Enter the email address for automatic fill on email printing
  - Be sure to enter the correct sales tax location/percent for new clients.
- Add a new vendor
- Rename Addresses
  - **Change** Address ID, or **combine** two Addresses. Cannot combine two clients that have the same proposal numbers.

See following detailed instructions.

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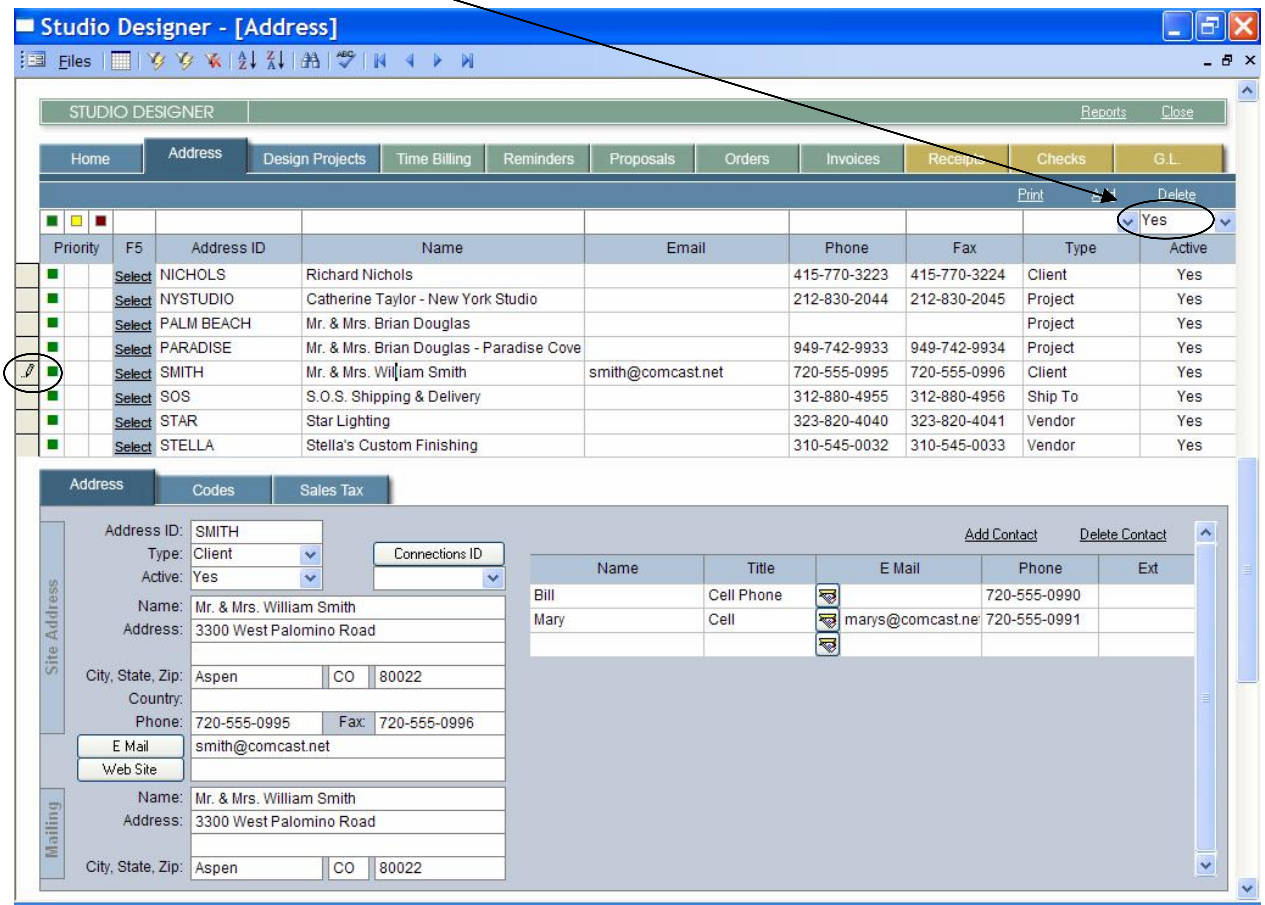
Entering addresses in Studio Designer

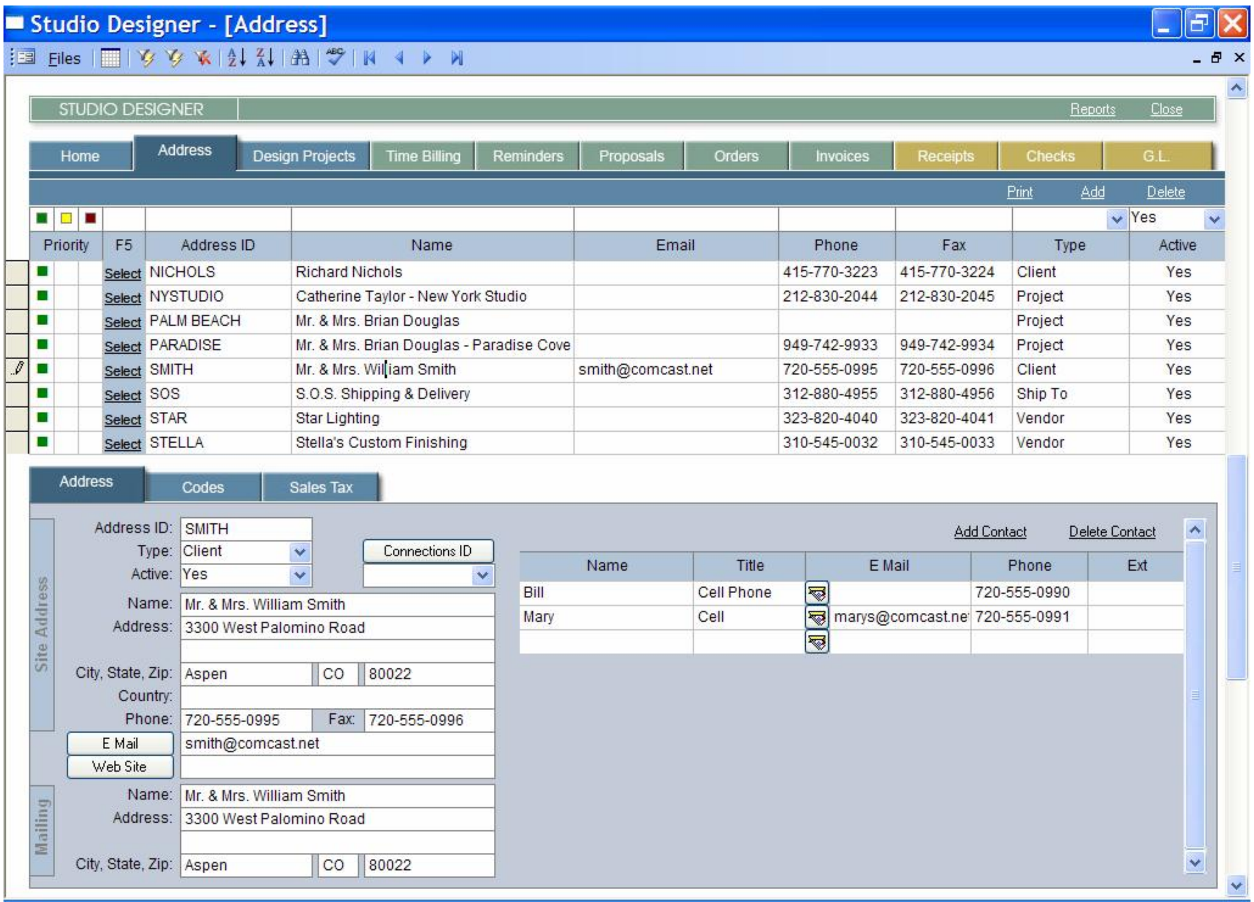
July 3, 2007

Address List

- Click Addresses from the Studio Designer main menu
- Addresses are sorted by Address ID within any specified filters (we are currently filtered for only Active addresses)



- Click anywhere within the row to select an address and view it's details within the lower part of the Addresses screen
- The item currently selected is indicated by the icon to the left of the Address ID
- Generally, the information that you enter into the Address ID is used for defaults as you add new Design Project items and Time Billing entries within Studio Designer so it's best to enter as much as possible at the same time you create the new Address ID. Keep in mind that defaults can be overridden at the time items and time billing entries are created.

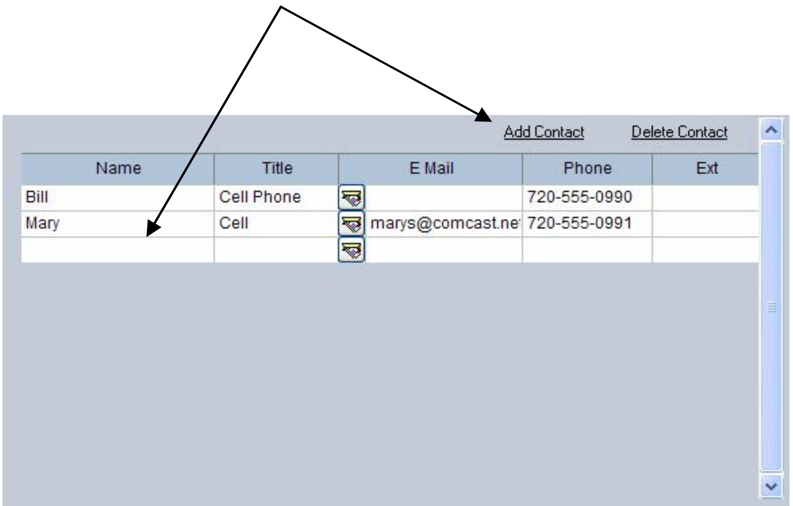


1. Address ID
   - May be up to 12 alpha and/or numeric characters. You may use symbols, but should not use ? (question marks), ‘ (apostrophes), or accent marks.
2. Type
   - You may only sell to Client types, but can write checks to and accept receipts from any address type.

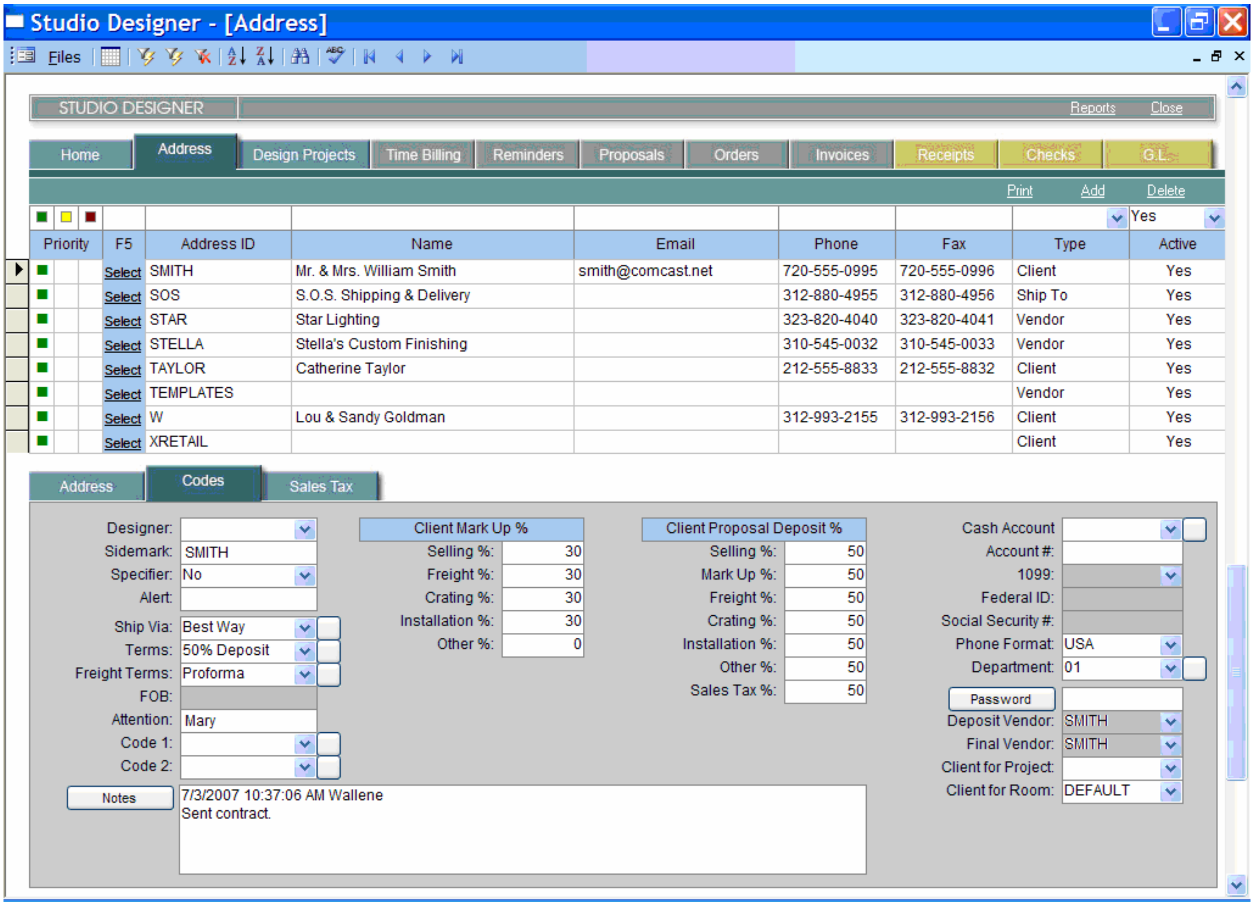
3. Active
   - To keep your address list current, set clients and vendors that you no longer use as Active – No. If you need to use them in the future, change them back to Active – Yes.
4. Site Address
   - This is the address used when specified as a Ship To. When you initially create an Address ID this address is automatically filled into the Mailing address. This will NOT automatically update the mailing address at any time after the initial Address ID creation. Avoid leaving any of these fields blank. Consider placing a . (period) into any that will not be used when entering an address. By default our forms (proposals, purchase orders, etc.) expect all of these fields to have something in them. If each field does not contain something, the entire address may show up blank when printing forms.
5. Phone and Fax
   - The dashes are automatically entered. If this is an international address, click Codes and change Phone Format to INT. This will remove the automatic dashes.
6. E Mail
   - This is the default email address used when emailing forms to this Address ID.
7. Web Site
   - Used most frequently for vendors, enter the website address without the www. on the front. For example, www.StudioToTheTrade.com would be entered as StudioToTheTrade.com.
8. Mailing Address
   - This is the address used when printing Proposals, Purchase Orders, Invoices, Statements, Checks, etc.
9. Connections ID
   - This is used to link your Address ID to the corresponding Address ID used by Studio Navigator. To automatically enter address information for one of our Studio Navigator vendors, click Add to create a blank, new Address Id and select a vendor from the Connections ID list. Click Yes when prompted. The vendor will automatically be created with the same Address ID used by Studio Navigator.

10. Contacts

- Enter additional phone numbers, email addresses, etc. Click into the last blank line or click Add Contact to enter new contacts. There is no limit to the number of contacts for each Address ID.



Codes (for Clients)



1. Fields that are only used for Vendors have been shaded on this screen, but are not shaded in Studio Designer.

2. Designer

   - If you assign specific designers to each client, select a designer from the list (the employee list is displayed).

3. Sidemark

   - Automatically filled with the Address ID, but may be changed to your preference. This is the second piece of the default sidemark that will automatically be created for each Purchase Order.

4. Specifier

    - Used for clients that will pay your vendors directly. This feature allows you to create purchase orders, but you will not be expected to pay the vendors and no accounting transactions will be generated.

5. Alert

    - This is a text space for your internal use. It does not show up on any default reports and does not trigger anything. It might be used to hold some kind of client detail, possibly to say “Visa” indicating that the client prefers to pay with Visa, or “Email” which might indicate that the client prefers to communicate via Email….

6. Ship Via

    - Although this is most commonly used for specifying shipping preferences for Vendor type addresses, you could also use it to indicate the client’s preferred carrier. If the client has no preference, leave it blank or select “Best Way”.

7. Terms

    - Select your standard invoice terms for this client. For accounting purposes, you might require the client to pay within 10 days of invoicing, in this case, you might select “Net 10”. It is very common for designers to require full payment before delivery which might be abbreviated as “PBD”. You may click the box beside Terms to open the list and enter additional terms. See Terms under Vendors for more details.

8. Freight Terms

    - Most commonly, designers have the same terms for freight as they do for goods, but you can use this to enter a separate set of terms specifically for freight.

9. Code 1

    - This is a User Defined field. You can use it to hold any variety of information types. It is available as filter criteria when printing address reports. For clients, it is frequently used for categorization. For example, if you click the box beside Code 1 to open the list, you could add Residential and Commercial. Then, when you close the list, you could select Residential on the clients that are Residential, and Commercial on your Commerical clients. This would give you the ability to print address reports that only list Residential clients, etc.

- Consider the possibilities for mailing lists as well. You could create mailing list types within the user code list and then assign the appropriate one to each client. For example, you have certain clients that you like to send Christmas cards to and other clients that you like to purchase gifts for. You could create a code for each one, and then assign the appropriate one to each client enabling you to print a separate list for each type of client.

10. Code 2
    - Works the same as Code 1
11. Notes
    - This is a memo field with the option for a date/time stamp where you can keep notes pertaining to your clients.
12. Client Mark Up Percent %
    - Enter the default mark up percent for each category for this client. For example, if you mark up product by 40%, enter 40. This can be overridden by Mark Up Percents on sales codes, and on the items as they are created.
13. Client Proposal Deposit %
    - Enter the default proposal deposit %. For example, if you require your client to pay a 50% deposit on goods before you will place an order, enter 50 in each applicable area. Each time you create an item to sell to this client, Studio will automatically request a 50% deposit from the client on the printed proposal. This can be overridden at the time the item is created.
14. Cash Account
    - This will normally be left empty. However, if you open a separate checking account specifically for this clients money, you can enter the account number from your chart of accounts that represents the appropriate checking account.
15. Account #

- Although this is normally left blank, ff you assign an account # for each client, enter that account # here.

16. Phone Format

- The default format is USA which automatically places the dashes between the area code and prefix of the phone number. Change this to INT to remove the automatic dashes allowing for free typing in the phone fields for this address.

17. Department

- Departments can be used to separate different types of clients for accounting and financial statement purposes. They can also be used to differentiate departments within your business such as design vs retail. The client determines the department used when posting accounting entries throughout the Studio Designer software.

18. Password

- Currently not used within Studio Designer

19. Client for Project

- Multiple projects can be created for each client. This field would only be filled in if this Address ID belonged to a project rather than a client. If this Address ID were for a project, the client that the project belongs to would be entered into this field.

20. Client for Room

- If this client uses the default room list, this should say DEFAULT, if they have a custom room list, this field would show the name of the custom room list.

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