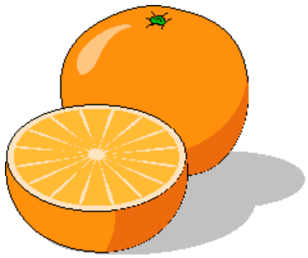

# Citrus Proposal

# User's Manual

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# Overview

**Citrus Proposal** is a general purpose Proposal creating program which can be used by almost any type of company.

**The basic routines are:**

- **Create and Print a Proposal**
- **Create a Field Proposal and print it (it is partially populated, you can hand write the body, etc)**
- **Display a Proposals Report (and delete unwanted), complete a Field Proposal**
- **Create your own Custom Terms and Disclaimer Statements**

# Getting Started

## The Setup Screen

When you 1st run the program, you need to enter some basic information.
The ***Welcome Screen*** will be displayed and then the ***Setup Screen*** will be displayed where you enter your **Business Information**, **Proposal Preferences**, **Personal Information** and select a Logo if desired.

- **Business Information** – Company Name, Street Address, etc.
- **Proposal Information** – next proposal number
- **Print Options –** Colors, number of copies, etc
- **Logo –** your Business Logo

**Business Information** – may appear automatically if created using some other Citrusware program. It not, enter it now.

**Proposal Information –** enter proposal number.

**Print Options –** During the setup process, you can select the colors for form borders and text, as well as text font.
Select the number of copies of each Proposal you wish to print. If using Graytex forms, select 2 or 3 depending on which form you will be using.

## The Main Menu

This screen has four radio buttons
Click the radio button for the option you wish to perform, followed by clicking the Goto button, the Selected Routine will begin.
The menu at the top of the form allows you to edit the data on the setup screen, and order forms.

## Creating Your Own Terms and Disclaimer

Before creating your 1st proposal, you might want to create your own **Business Terms** and/or **Disclaimer** statement. Select *Create Custom Terms/Disclaimer* radio button and click ***Go***.
Type your own Terms in the Terms box, and your own disclaimer in the Disclaimer box.
When creating a Proposal you can select either the generic or custom terms or disclaimer.
(Select only a Disclaimer if creating a Field Proposal).

# Using Citrus Proposal

**Creating A Proposal** – Select this button and the *Customer Selection Screen* is displayed.
Select a Customer (See Selecting a Customer Routine at the very end of this document).
Press the "*Create Button*" to create a Proposal.

The *Write a Proposal* screen is displayed. The customer information is displayed as the Account Billing Address and the Site Address. If the site location is not the same as the Billing Address, click the ***Enter Manually*** button and the fields are cleared. Enter the Site Location information. (Re-selecting the button again will reload the Account Billing information into the **Site Location Data Boxes**.
Click the NEXT arrow.

**Building the Proposal Body** – The big white square is the Body of the Proposal. It is a simple "***Text Box***", which means you can add data to it, remove data from it or reposition data within it. Such basic functions as Cut, Copy and Paste work with the Proposal body Box.
This is where you define the deliverables of your proposal. As you use the program, you might wish to create proposals which are similar to previous proposals.
Click the Add Header button to add the **Basic Header Data,** it can be modified once in the proposal body area.

You can populate the body in one of 3 ways:

- **Create from a Template**
- **Create from a document**
- **Create from Scratch**

**Creating from a Template** – If the *Create from Template radio button* is enabled, then you've saved a Template previously and can reload it as the body of this proposal. Click the *radio button* and a list of template names will be displayed. Select the template and click it. The body will be populated. As stated above, you can add to, remove from or rearrange data within the *body box.*

**Note:** If you have installed Citrusware's **CitrusInvoicer**, **Citrus Cycle Invoicer or Citrus Inventory** the *Add Items **Menu** Selection* will become enabled at this time. Items created with **CitrusInvoicer** can be selected, quantities entered and cost (charges) automatically calculated and added to the proposal body. These amounts have no affect on the Proposal Price.
The proposal body lines looks something like this:

| Qty | Description | Unit Cost | Extension |
|---|---|---|---|
| 4 | Widgets | $7.95 | $31.80 |
| 2 | Widget Holders | $18.00 | $36.00 |

**Creating from a Document** – You can import the body from a previously created text document. **Citrus Proposal** does not have a spell checker built in, so many find this useful. Click the radio button and browse to the document you wish to use.

**Creating from Scratch** – Click the radio button.
Type into the body.

Once the body is built, you can add a taxation statement and/or Proposal Terms.
Click the NEXT button.

## Pricing and Payment Schedule

**Enter the Proposed Amount –** Enter the amount that you wish to propose.

**Select a Payment Plan** – Select one of the 3 Payment Plan options

- In full upon Completion (1Payment)
- Down Payment and Final Payment (2 payments)
- Multiple Payments Schedule (up to 8 payments).

If you select Multiple Payments Schedule, click the payments box and select the number of payments desired. Options 1 or 2 automatically load the box.
The correct number of Payment boxes will be displayed.

**Equal Payment Amounts** - If you would like all of the payments to be about the same amount, click the *Equal Payment Amounts* button. The Proposed Amount is divided by the number of payments. Any odd cents are placed in the final payment.

**Payment Dates** – Click on the Calendar to establish a Payment Date for each payment. You can not enter a Payment Date prior to any existing dates. If you make a mistake or wish to change the Scheduled Date, click the Clear button and start over.

The *All Payments Dates have been entered* prompt will display. Click Okay and proceed.

## Print and Finalize

**Set the Duration Value**
The **Proposal Effective for** default value is 30 days. You can change this by clicking on the arrow on the right and selecting from the list or by entering your own number of days directly into the box.

**Select a Disclaimer**
You can use the Generic disclaimer of a Custom disclaimer if you have created and saved one.

**Saving a Template** – If this proposal body was created from Scratch or from a Document, you can save it as a template for use later. (If created from a Template, the Create a Template window is not enabled). Click the ***Save as*** button and you will be prompted for a name for this template. Enter a name that will uniquely identify this template. Also, .**txt** is appended to the name that you entered. This just tells the computer is a text file. When you load templates later, each file has this **.txt** at the end.

**Deleting a Template** – If this proposal was created from a template and it is no longer needed, it can be deleted. Click the Delete button.
Click *Ready to Print* button.
Click the *Print and Record* Button.

## Creating a Field Proposal

A Field Proposal is designed for those companies where creating a proposal requires a visit to a job site or customer location.  The body of the proposal is not populated, rather, lines are printed where you can hand write the deliverables, etc. The price and payment schedule are left blank.

**Create A Field Proposal**  – Select this button and the Customer Selection Screen is displayed.
Select a Customer (See Selecting a Customer Routine).
Press “Create” to create a Field Proposal.

The Creating a Field Proposal Screen is displayed.

**Select a Disclaimer**
You can use the Generic disclaimer of a Custom disclaimer if you have created and saved one.

**Set the Duration Value**
The **Proposal Effective for** default value is 30 days.  You can change this by clicking on the arrow on the right and selecting from the list or by entering your own number of days directly into the box.

Click Print.

## Finalizing a Field Proposal (Deluxe only)

Select Finalize a Field Proposal from the Main Menu.
Only Field Proposals will populate the grid. (Indicated by **FP** at the beginning of the Proposal Number).
Select the Proposal you wish to finalize.
The Customer and Site details will be displayed.
You can modify the Site Data at this time
Click **Continue**
Enter the body data and amount before taxation.
Select one or two payments and dates to be paid.
Click **Finalize.**
The proposal will be saved and the FP will be removed from the Proposal Number.
Proposal Invoices can now be printed.

## Printing Proposal Invoices (Deluxe only)

Select Print Proposal Invoices from the Main Menu
The grid will be populated with all proposals.
Field Proposals  (Indicated by **FP** at the beginning of the Proposal Number) can not be invoiced.
Select a proposal from the grid.
The proposal details will be displayed (for reference only).
If multiple payments are scheduled, the **Print All Invoices option** button will be selected.
You can choose to print one finalized invoice or individual invoices for each scheduled payment.
In the Print Setup box, select whether or not to print a remittance type invoice.
Load remittance type paper or plain blank paper based on your selection.
Click the **Printer Image**.

**Display Proposals Report** – Select this button and all existing Proposals are listed in a summary grid.

Click the **Proposal Number** in the grid to review the proposal details.
If the Proposal is a Field Proposal, you can enter the proposed price.

You can delete no longer needed proposals.
Click the **Select column** for each Proposal to DELETE.
Click the **DELETE SELECTED PROPOSALS** button.

## The Customer Screen

NOTE: Customer records are stored in a file named CustomerData.txt.
It is a **structured text file**, which means each element within the record has a fixed length.
You can view it using any Text Editor such as Notepad, **but do not alter the contents**.
**Modify Customer records only while viewing the Customer Record with the customer screen.**

**Creating customer records**
To create a new customer, click *Files* then *Add a New Customer*. The Data fields will be cleared.
If you change your mind, click *Cancel Add* and the Add routine will be exited.

A customer is either a Business or an Individual. Select the customer type 1st when creating a new customer.

Business customers have one name field, while individual customers have a title, first name, middle initial and a last name.

Customers appear in the order in which they were created.

**Modifying a customer record**
Simply type over the data you wish to modify. Taking any action after making changes will save the customer record.

**Deleting a customer record**
To delete the current customer, click the **Files Menu** then **Delete this Customer**.
Click *Yes* to confirm the deletion and the customer record will be removed from the Customer File.

**Finding customers**
You can **Navigate** through the customer file:

- **<<** returns to the first customer record
- **<** steps back one Customer from the current record
- **>** steps ahead one Customer from the current record
- **>>** steps to the last Customer in the file

You can "**Search**" for a Customer by clicking the "Search by Criteria" Button.
The "Customer Search Screen" is displayed.
Select a *Search Criteria* example - Street Address.
Enter *Search Data* example – Main St
Click Search

All customer records containing the *Search Data* in the *Search Criteria* field will be displayed in the C*ustomers Found grid*.

You broaden your search by decreasing the search data.
*Main* will produce Main St, W Main St, Main Ave, Mainland St, etc

You lessen your search by increasing the search data.
*123 Main St* will produce only 123 Main St

**Note** the difference between *by Last Name* and *by Business Name*.
*Last Name* finds individuals, B*usiness Name* finds businesses.

Searching is not case sensitive, in other words, if you enter *Smith*, all customer records with Smith or smith in the name field will be found (including Blacksmith, Smithson, etc).
Once you have selected the "Search Criteria" and entered the search data, click "Search".
Click on the customer that you wish to select and the customer record will be loaded to the customer screen.
If only one customer record meets the search criteria then it loads automatically.
If no record is found, you can create a new record at this time.

You can **"Select"** a customer by clicking "the From Name List" button.
Clicking "from Name List" displays a dropdown list on top of the Customer Name box.
This list contains all of your customers and is alphabetically sorted.
You can click the arrow on the right side and the list drops down to display all of your customers.
You can scroll through the list to find an customer and click on it to load it.

You can also start typing customer information into the top portion of the list and the next customer that contains what you have typed will be loaded. Continue to type until the correct customer loads.
Press the <TAB> key to hide the list and load the customer.

The "From Name List" button is a toggle button. Clicking it again will hide the Customer Select List.

**Customer Auxiliary Data**

(Not available in the TBYB Version)

The Toggle Aux Screen Button displays the Auxiliary Data screen where you can store unique data about each customer account. There are 6 data boxes with Headings.

The Headings apply to ALL customer accounts. (In other words, if you set Heading #1 to "Date Installed", that's the Heading #1 for all accounts).

The data, however, can differ for each account.

Once you decide what each data box will contain, delete the Default Heading and type a new heading.
Click the Save Headings button when all new headings are entered.

As you select or create new accounts, you can enter Auxiliary Data.
The Clear buttons clear the data box to the left for the current account.