ProjectSpec™ 5

# Twips* and Tricks-

# Printing and Reporting

*A Twip is a unit of measurement used in the Print Template Editor.  We will cover more details during this training.

Open the Print Template Editing.pmx file

to work with throughout this self-paced learning

# VIDEOS

Every time you see the "play" icon, click to view the accompanying video

# PROJECTINFO

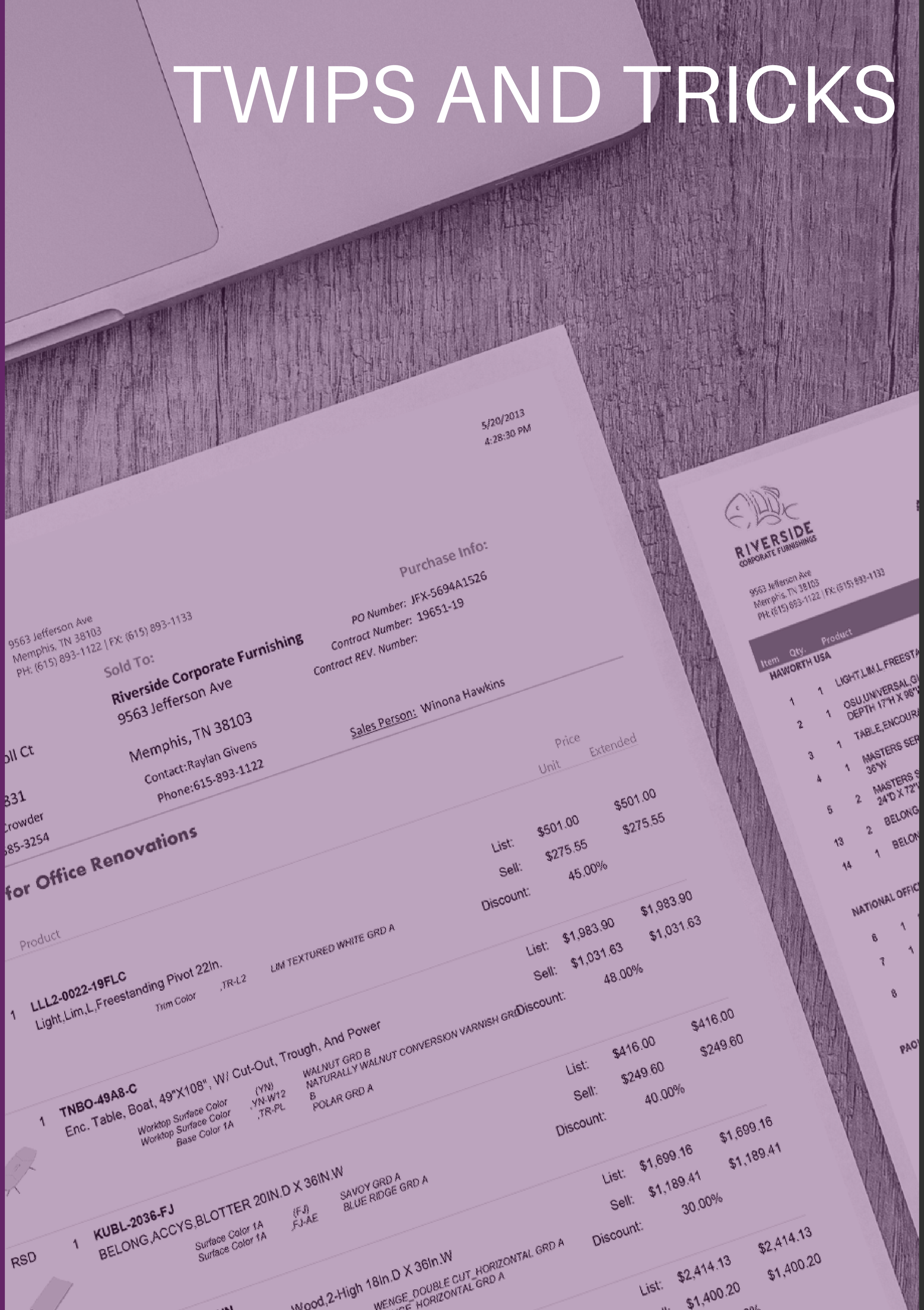
Users can put info that needs attached to the Project here.
This information can be added to a print report.

## ADDRESS TAB:

Enter the below information into the sold to column

Dropdown: Manufacturer
Code: Blank
Company: ProjectMatrix
Address 1: 11240 Cornell Park Dr
Address 2: Suite 102
Address 3: Blank
City, State Zip: Cincinnati, OH 45242
Country: USA
Contact: Erin Corrill
Phone: 513-554-1665
email: erin@projectmatrix.com
Custom: Blank

# TWIPS AND TRICKS




**TWIPS AND TRICKS**

# PROJECTINFO

Users can put info that needs attached to the Project here.
This information can be added to a print report.

# SALES INFO TAB

Enter the below information into the Sales

Select: Blank

Name: Your Name

Sales #: 1234

Phone#: Your Number

Mobile #: Your Number

Email: Your email

Custom: Blank

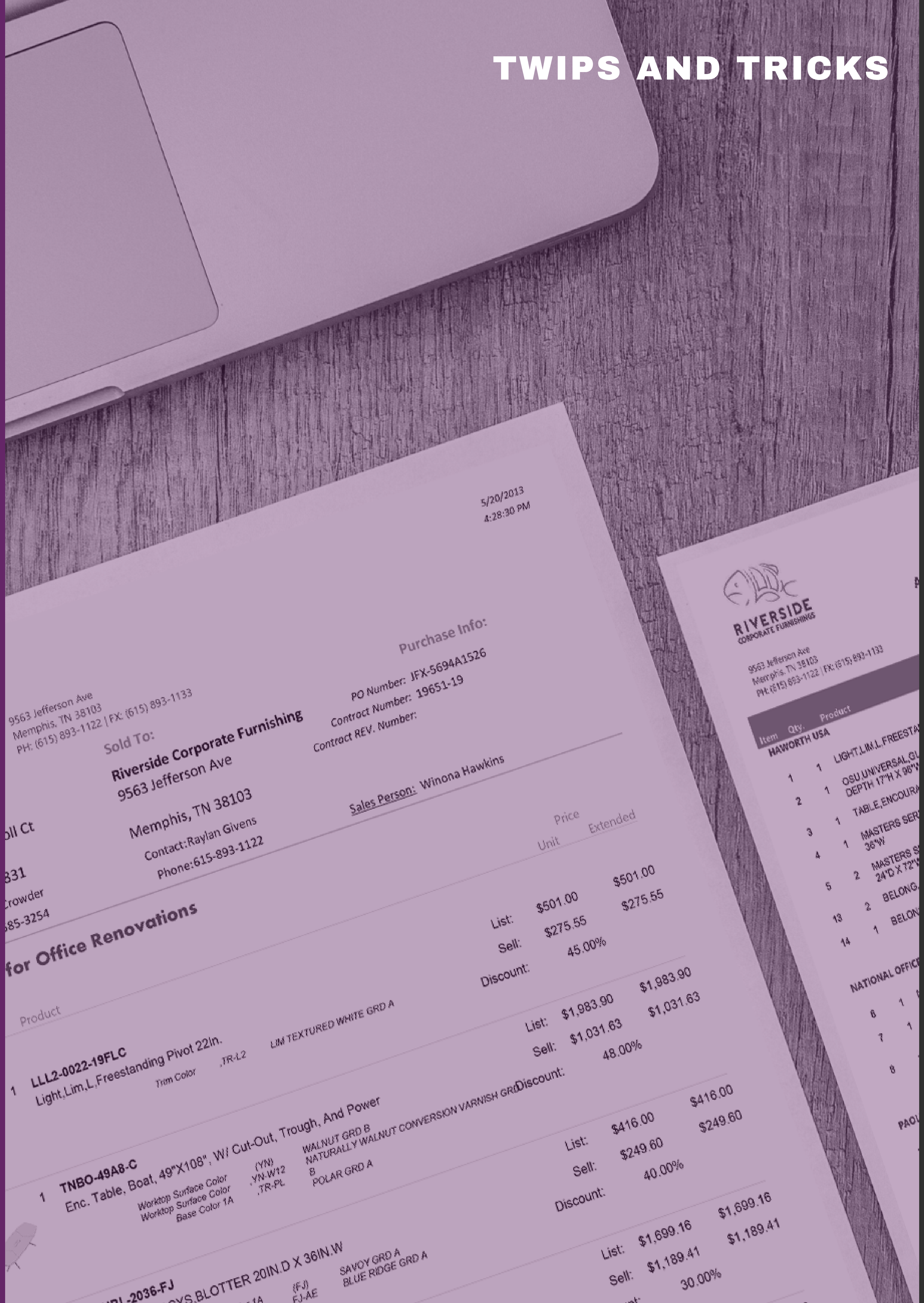
# PROJECTINFO

Users can put info that needs attached to the Project here.
This information can be added to a print report.

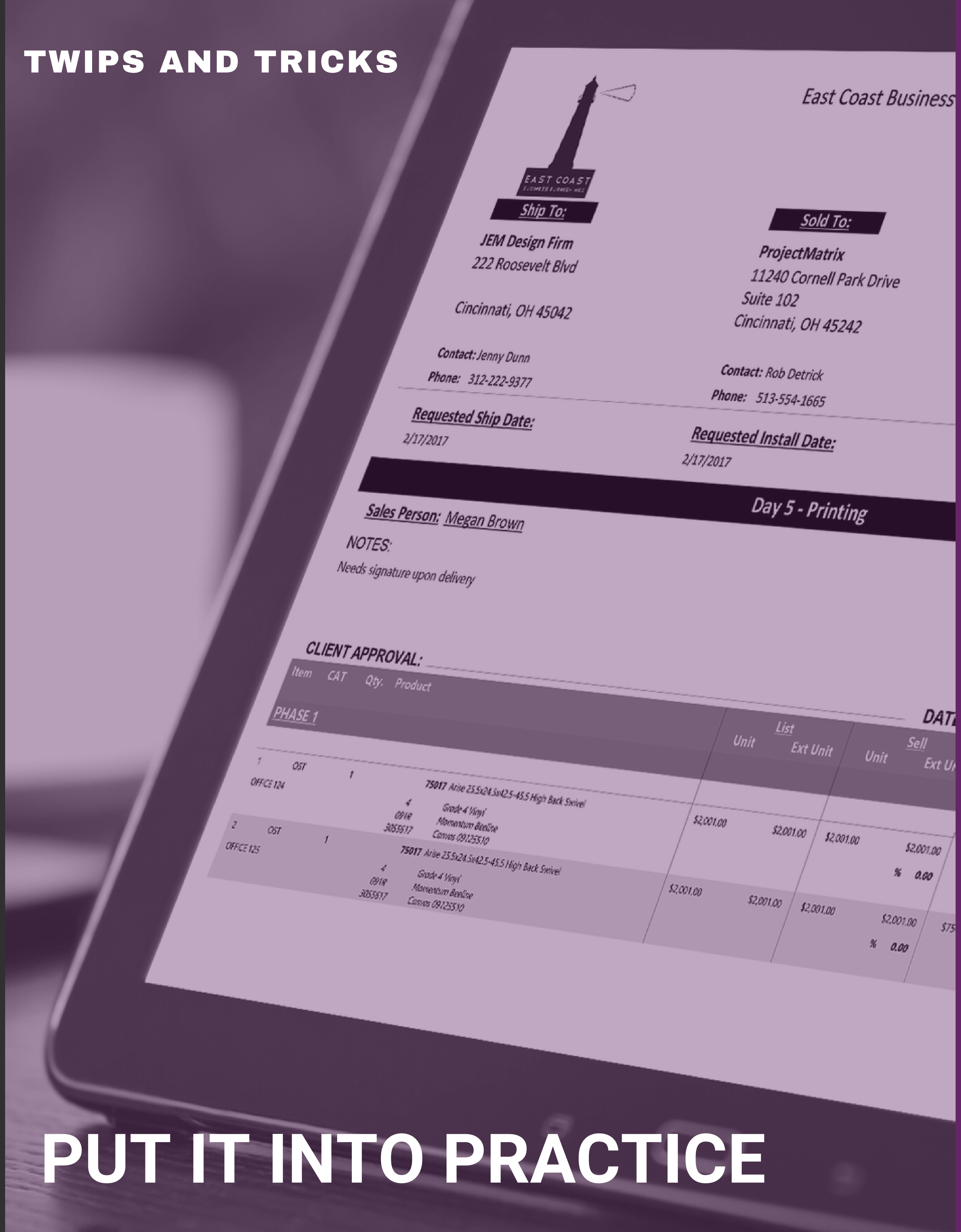
# ORDER INFO TAB:

Enter the below information into the Dealer section

PO Number: 123456
Job Number: Blank
Contract Number: Blank
Account Number: Blank
Revision Number: 2
Order Type:(Edit box to the left will let you edit the dropdown option): Select
Custom 1:459-145
Custom 2:
Custom 3:
Edit:Edit Checkbox will let you change the Custom 1, Custom 2 and Custom 3 box. Check the Edit box and Change Custom 1 to Quote Number



TWIPS AND TRICKS




# PUT IT INTO PRACTICE

# PROJECTINFO

Users can put info that needs attached to the Project here. This information can be added to a print report.

## ORDER INFO TAB

### ENTER THE BELOW INFORMATION INTO THE CUSTOMER SECTION

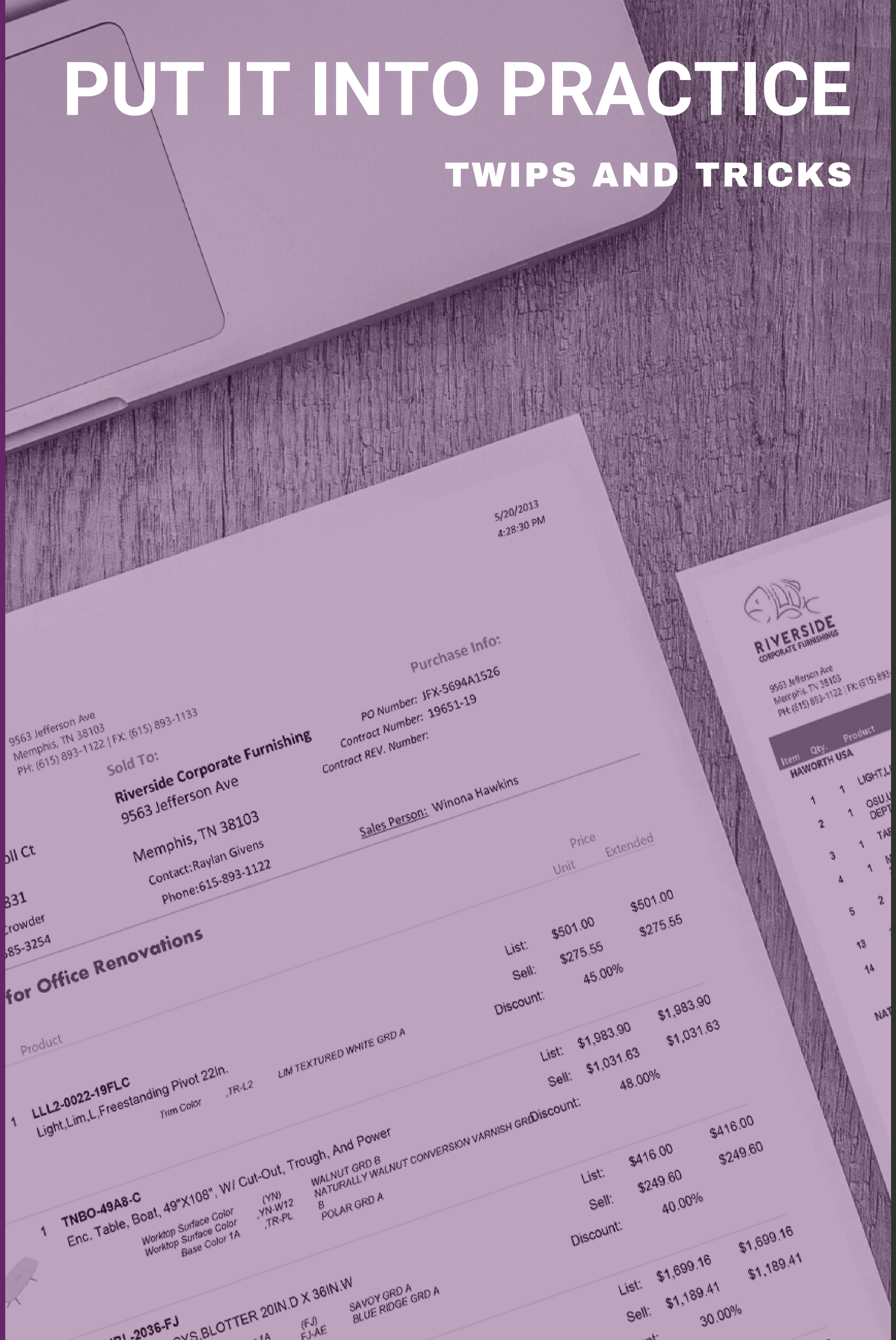
PO Number: Blank
Job Number: Blank
Contract Number: Blank
Account Number: 789
Authorized by: Rob Detrick
Custom 1:
Custom 2:
Custom 3:
Edit: The Edit Checkbox will let you change the Custom 1, Custom 2, and Custom 3 box.

### ENTER THE BELOW INFORMATION INTO THE DATES SECTION

Order Date: Change to Today's Date
Note: Blank
Ship Date: Change to 6 weeks away
Note: Blank
Install Date: Change to 7 weeks away
Note: Installer to be determined at next meeting

# PUT IT INTO PRACTICE

## TWIPS AND TRICKS




# PROJECTINFO

Users can put info that needs attached to the Project here.
This information can be added to a print report.

# NOTES

SAVED NOTES: THESE WILL SAVE TO THE COMPUTER TO BE USED AGAIN

Edit:Edit Checkbox will let you change the Saved Notes
Make the following changes
Saved Note 1:  Free Shipping
Saved Note 2:  Net 20
Saved Note 3:  Net 30
Saved Note 4: 50% Deposit
Leave the rest blank

CUSTOM NOTES: WILL SAVE TO THE PROJECT

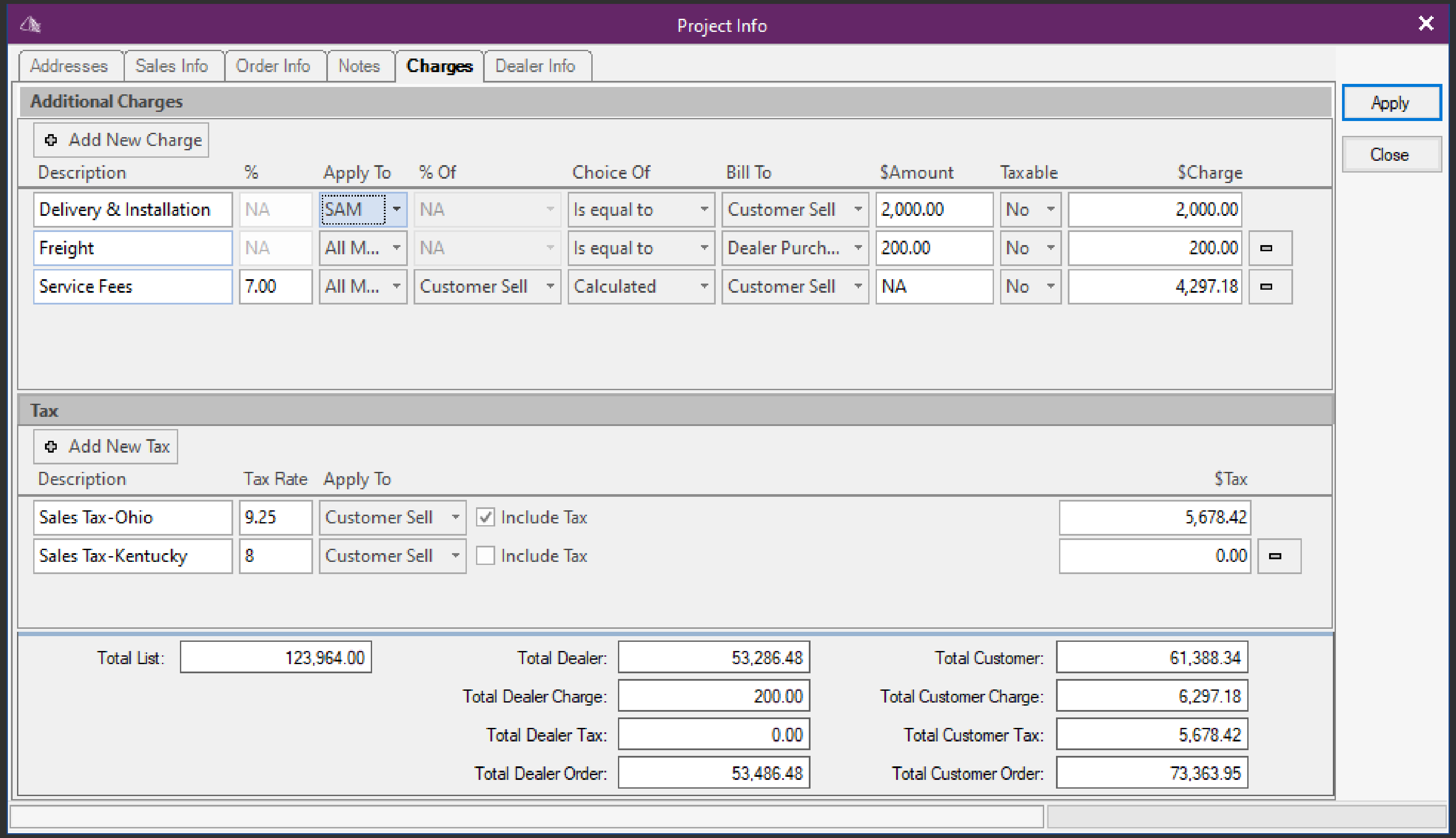
Custom Note 1:  Delivery must happen between 9-5 at Dock door 2.  Please call installer after delivery.

# PROJECTINFO

USERS CAN PUT INFO THAT NEEDS ATTACHED TO THE PROJECT HERE. THIS INFORMATION CAN BE ADDED TO A PRINT REPORT.

## CHARGES TAB

Additional Charges: These will save to the specific Project.
You will need to create new ones with each new Project.
Make the following changes to yours.
Tax: These will save to your computer to be used on future Projects. Add a Tax



# PUT IT INTO PRACTICE

# PROJECTINFO

USERS CAN PUT INFO THAT NEEDS ATTACHED TO THE PROJECT HERE. THIS INFORMATION CAN BE ADDED TO A PRINT REPORT.

## DEALER CONTACT INFO

ENTER THE BELOW INFORMATION

Company: ProjectMatrix
Address 1: 11240 Cornell Park Dr
Address 2: Suite 102
Address 3: Blank
City: Cincinnati
Sate: OH
Zip: 45242
Contact: Erin Corrill
Phone: 513-554-1665
E-mail: www.projectmatrix.com

IF YOU HAVE MULTIPLE LOCATIONS THIS INFO CAN BE SAVED/LOADED

CLICK APPLY WHEN YOU HAVE MADE ALL THE DESIRED CHANGES

# DETAIL TAB

The Detail Tab will let you group line items by criteria and see all the detailed information about the selected part number.  You can add images to the grouped Tags for printing

- Filter By:  Tag 1
- Select Office 01
- Group Description: These are the new Panels for the open seating area
- Group Image resources: Browse on your computer for a .jpg or .png
- Click SAVE
- Continue adding Descriptions and images to the rest of the Tags
- Click Print: Click Next when the Print window appears.  Select Tag 1 Full Detail Report and click Preview.
- This will show you the possibilty of what your report can look like with images added to it.

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# Reporting Tab

**The Reporting tab houses some commonly used financial, part detail, and option reports. These can be edited in the Print Template Editor.**

Enter the title. ProjectMatrix

Summary by Tag 1

| Tag 1 | List | Purchase | Sell | Margin |
|---|---|---|---|---|
| Office 01 | $20,381.00 | $8,409.79 | $9,488.13 | $1,078.36 |
| Office 02 | $37,146.00 | $16,423.66 | $18,915.29 | $2,491.62 |
| Office 03 | $38,849.00 | $16,199.27 | $18,850.57 | $2,651.33 |
| Office 04 | $27,588.00 | $12,253.77 | $14,134.35 | $1,880.57 |
| Totals: | $123,964.00 | $53,286.48 | $61,388.34 | $8,101.86 |

FINANCIAL REPORT BY TAG

Enter the title. ProjectMatrix

Summary by Part Number

KNOLL

KSS Knoll Office Seating

**55C3-6-AHK-GH** Life Chair, Armless, Grey Base & Levers, No Lumbar, Grey Hard Caster, high cylinder 4

List: $1,880.00
Purchase: $676.80 *-64.00%*
Sell: $825.37 *-56.10%*
Margin: $148.57 *18.00%*

| Location: | Options Per | QTY |
|---|---|---|
| Office 03 | COL: Sunset, SEAT: Ultra Seat Topper, UPH: Cal 133, SEAT: Alignment (A), COL: Straw, BACK: with Back Topper, BACK: TBA (A) | 2 |
| Office 03 | | 2 |

SAMPLE

SAM SAMPLE

**DSK-B-2456** Desks Bow Front 24" X 56" 3

List: $1,225.00
Purchase: $490.00 *-60.00%*
Sell: $500.00 *-59.18%*
Margin: $10.00 *2.00%*

| Location: | Options Per | QTY |
|---|---|---|
| Office 01 | Grade 1, Platinum, Left, Lock Number 1 | 3 |

SAMPLE

PART DETAIL REPORT

Enter the title. ProjectMatrix

Summary by Part Number

KNOLL

KSS Knoll Office Seating

**55C3-6-AHK-GH** Life Chair, Armless, Grey Base & Levers, No Lumbar, Grey Hard Caster, high cylinder 4

List: $1,880.00
Purchase: $676.80 *-64.00%*
Sell: $825.37 *-56.10%*
Margin: $148.57 *18.00%*

| Location: | Options Per | QTY |
|---|---|---|
| Office 03 | COL: Sunset, SEAT: Ultra Seat Topper, UPH: Cal 133, SEAT: Alignment (A), COL: Straw, BACK: with Back Topper, BACK: TBA (A) | 2 |
| Office 03 | | 2 |

SAMPLE

SAM SAMPLE

**DSK-B-2456** Desks Bow Front 24" X 56" 3

List: $1,225.00
Purchase: $490.00 *-60.00%*
Sell: $500.00 *-59.18%*
Margin: $10.00 *2.00%*

| Location: | Options Per | QTY |
|---|---|---|
| Office 01 | Grade 1, Platinum, Left, Lock Number 1 | 3 |

SAMPLE

OPTION REPORT

# REPORTING TAB

Reports in the reporting tab can be edited, but first they need to be moved to a new location.

# EDITING DEFAULT REPORTS

## ADD YOUR GRAPHIC STANDARDS

ProjectSpec5 comes with several default reports. These are commonly requested by users.
We have added our branding to them, to prompt you to make them your own. In the video on the next slide, we will show you how to add in your company logo and change the colors around to fit your graphic standards.

# CREATING YOUR OWN REPORT

While ProjectSpec5 comes with several default reports, you may find a need to create your own. We will go over the steps involved in creating your own custom report.

- In the Reports tab, click on the piece of paper to create a new report.
  - The Header section is the very first thing that will be seen when printed. This normally contains the Sold to: and Ship To information. Much of what is stored in ProjectInfo goes here.
  - The Page Header Section will be the first thing seen starting on page 2, and on EVERY PAGE after
  - The detail section is where your spreadsheet will print. It will print in the same order as the spreadsheet unless grouping is added to the report. This will be covered later.
  - Page Footer will show at the bottom of EVERY page.
  - Footer is the very last thing to be printed. Normally contains Totals and Terms and Conditions

# ADD YOUR COMPANY LOGO

In this video you will see how to Delete the ProjectSpec5 logo, add your own logo, and change some of the color themes

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# Left Side Tabs

## REPORTS

This is where all the reports in your template are found.

## GENERAL

This is where basic Project Info can be found, dealer contact info, Sold To, Ship To, and Address 3. These fields can be dragged and dropped into your report

## SALES/ORDER

This is where Sales, Design, Account Manager info can be found. Also, you can find the Dealer, Customer, and Dates information here. These fields can be dragged and dropped into your report.

## NOTES/CHARGES

Saved Notes, Custom Notes, Addition Charges, Tax, and Information from the Discount Table, can be found here. These fields can be dragged and dropped into your report.

## DETAIL

Part Detail, Options, Tagging, Special, Shipping, and Miscellaneous columns from the spreadsheet can be found here. These fields can be dragged and dropped into your report.

## PRICE

Unit/List, Dealer/Purchase, Customer/Sell, Margin, and Price Zone info can be found here. These fields can be dragged and dropped into your report.

## GROUP

This is where the Grouping info from the Details Tab can be found.

## TOTAL

Price Totals, Percentage Totals, and Option Summaries can be found here.

# PROPERTY TAB

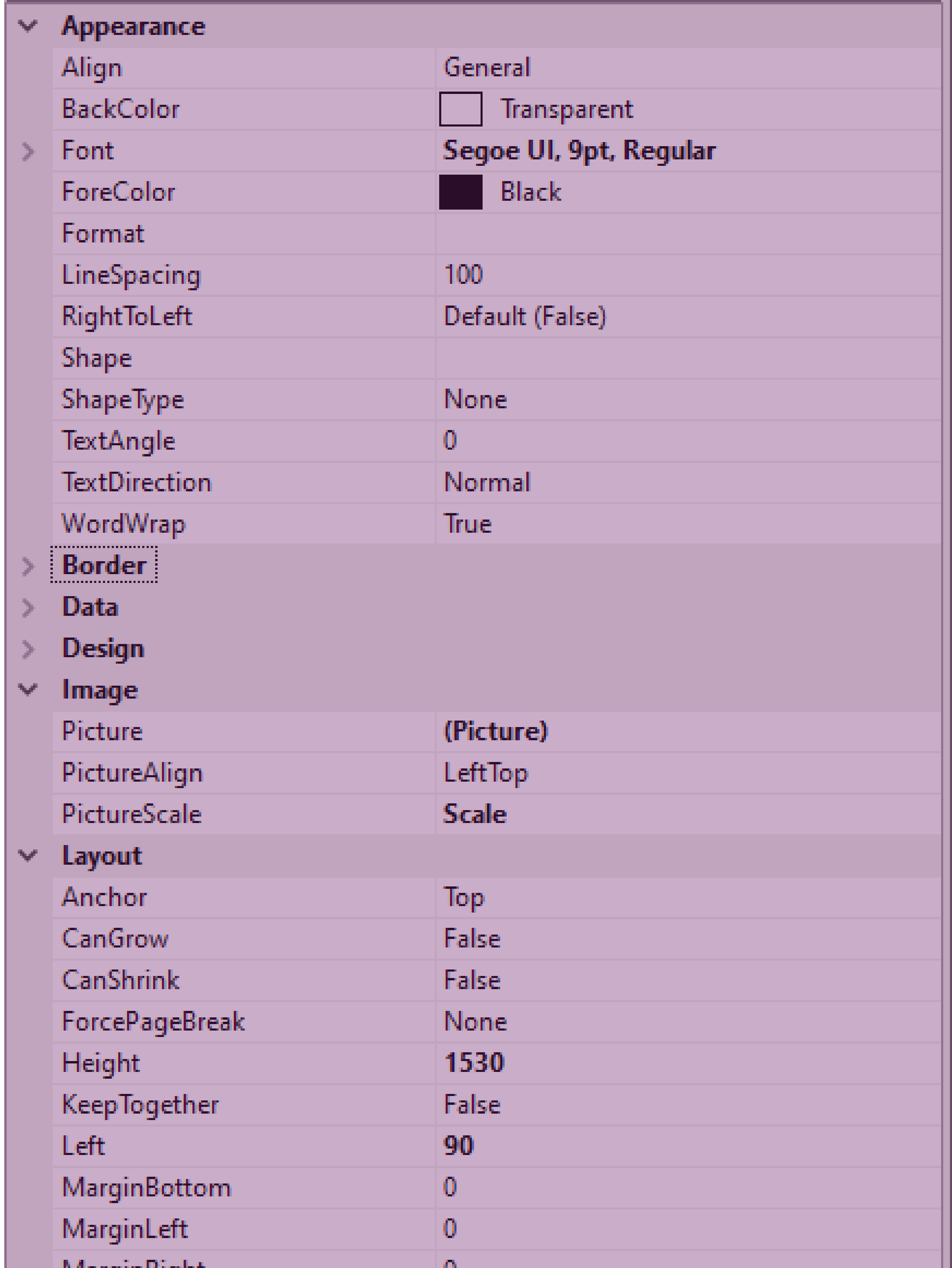
## IN-DEPTH EDITING

The Property Tab allows you to finely edit fields in the Report. You can change the Font, Colors (using supplied colors or entering your own RGB Codes), height and width of a field, and more. To Edit a field, select it first in the report then go to the Property Tab.

Height, Width, and placement can be finely manipulated using TWIPS. TWIPS are a graphical measurement used in Print Template Editing. 1440 TWIPS equal 1 inch. If you want a field to start 1 inch into your report, you can move it 1440 twips.

Click here for a TWIPS calculator.

WATCH THIS VIDEO ON THE PROPERTY TAB



TWIPS AND TRICKS

# Top Tabs

## FILE

New, Open, Save, Save As, Close and all your recent Print Templates can be found here.

## HOME

New, Open, Save, Save As, Option, Close Designer, Exit Spec Print, and Save & Exit can be found here.

## DESIGN

The Design Tab is where you can make edits, change fonts, Group/sort the report, add a sub report or material swatch, add common calculated fields, company logos, part previews, and Grouped Tagging Images

## ARRANGE

The Arrange Tab is where you can make edits (Cut, Copy, Paste), change styles, edit the grid, align fields, position fields, and change field sizes.

## PAGE SETUP

The Page Setup Tab will let you preview the report, make edits (cut, copy, paste), set report to Portrait or Landscape view, and change sizing and margins in the Page Setup command.

# ADDING FIELDS TO YOUR REPORT

Adding fields to your report are simple. Click and Drag the field and place it into place on your report.

# ARRANGING FIELDS IN YOUR REPORT

Arranging fields in your report can be tricky just using your mouse. Select multiple fields by using the CTRL key on your keyboard, making a selection box, or clicking in the margin to select everything in that row or column. The field with the BLUE corner boxes is the anchored field. Meaning other selected fields will snap to this anchored field.

# PRINT TEMPLATE EDITOR

## SORTING AND GROUPING

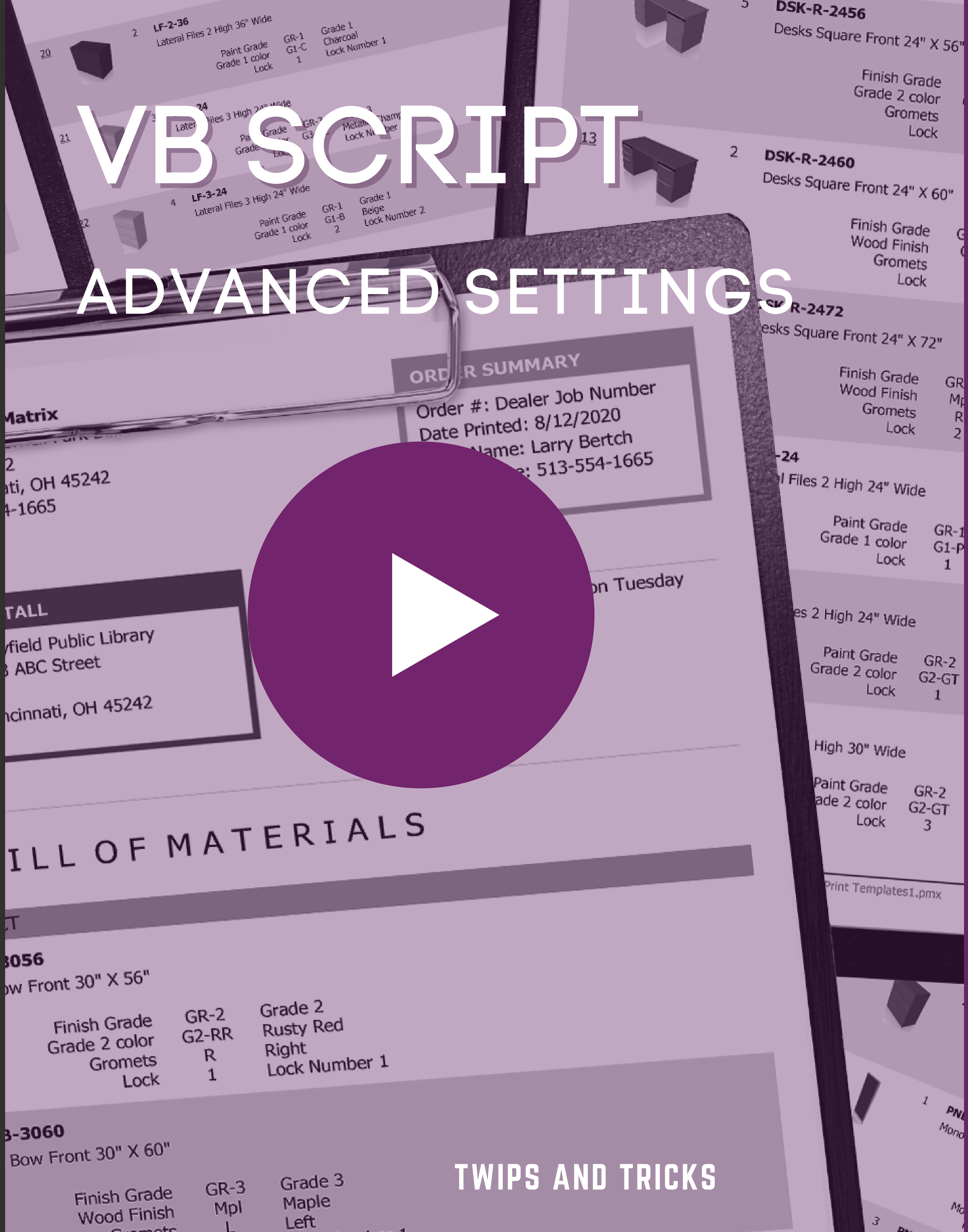
The reports will print the same order as the spreadsheet, and without subtotals unless those are added to the report.  Click on the Sorting and Grouping icon on the Design Tab.

- Click ADD
- Group By: select Tag 1
- Sort Ascending (if no sort is selected, then the report will print in spreadsheet order, if you want a subtotal, this will subtotal every time Tag 1 changes. )
- Keep Together: First Detail (This will guarantee that you dont end up with a Tag header at the bottom of a page without corresponding info)
- Header: Check (This will let you enter the Tag information)
- Footer: Check (This will let you enter a subtotal)
- Click OK
- Go to Detail Tab (on left) and Drag Tag 1 into Tag1 Header section
- Drag Tag1 into Tag1 footer
- In the design tab, click on the greek letter Sigma and select Customer_Ext.  This will be the subtotal Sell Price for that specific tag. Draw a box in the Tag1 footer field.
- Click Preview

# SORTING GROUPING AND SUBTOTALING.

# VB SCRIPT

## ADVANCED SETTINGS




The print template editor will allow you to edit a LOT of fields, make changes, and really customize your report.  However, there are times that it is not enough.  In these cases we can do some more advanced editing using some VB scripting.

- To combine a "label" and a "field" you can type the following into your field
  - "label" & (field)
- Date formats
  a. Format(Now, "Short Date")
     - 1/1/2020
  b. Format(Now, "Medium Date")
     - 1-Jan-20
  c. Format(Now, "Long Date")
     - Wednesday, Januray 1, 2020
- Add % to the END of a field (Be sure to remove the formatting of currency or #.00_
  - FORMAT(FIELD, "#.00") & "%"

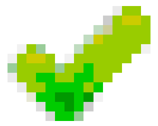
# ADD BOUND IMAGE

## ADDING IMAGES FROM THE SPREADSHEET

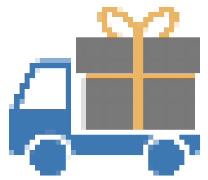
You can add more images to your report besides your company logo.

Click on the Add Bound Image Icon and select from

**PICTURE**



**COMPLETE**



**ICON**

**SWATCH**

**TWIPS AND TRICKS**

# SUB-REPORT

## EMBED A REPORT INSIDE A REPORT

If several reports will have the same information, a sub-report can save you lots of time.  This is often used with the same header on several reports, or adding your Terms and Conditions to several reports.

## ON THE DESIGN TAB CLICK SUB-REPORT

Go to the report you want to add the Sub-Report too.  Click on Sub-report on the Design tab and select the report you want to add.  Draw a box the Width of the report.  Click Preview to see your new sub-report

# STYLES

Styles let you make alternating lines in the detail section a different color.

# CONTACT INFORMATION

## MAILING ADDRESS

11240 Cornell Park Dr.  Suite 102 Cincinnati, OH 45242

## WEBSITE

www.projectmatrix.com

## EMAIL ADDRESS

training@projectmatrix.com

## PHONE NUMBER

513.554.1665