

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



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

Riverside Corporate 563 Jefferson Ave

TWIPS AND TRICKS

5/20/2013 4:28:30 PM

\$416.00

\$2,414.13 \$1.400.20

\$1,699.16

\$1,189.41

\$2,414.13

\$1,031.63

\$1,983.90 \$1,031.63



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



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

\$1,983.90

\$1,031,63

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TWIPS

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Cincinnati, OH 45042 Suite 102 Cincinnati, OH 45042 Contact: lenny Dunn Phone: 312-222-9377 Contact: Rob Detrick Phone: 513-554-1665 Requested Ship Date: 2/17/2017 Requested Install Date: 2/17/2017 Day 5 - Printing Sales Person: Megan Brown NOTES: Weeds signature upon delivery Notes: Varianti Or Product Unit Lift Luit Unit Lift Luit Unit Lift Luit Unit Sales Person: Megan Brown NOTES: Veeds signature upon delivery		222 Roosevelt Blvd	11240 Cornell Park Drive
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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.

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

ENTER THE BELOW INFORMATION INTO THE DATES SECTION

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.

PUT IT INTO PRACTICE TWIPS AND TRICKS

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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

A Project Info									×						
Addresses	Sales Info (Order Info	Notes	Charges	Dealer I	nfo									
Additional Ch	arges														Apply
Add New	Charge														Close
Description		%	Apply To	% Of		Choic	e Of	Bill To		\$Amount	Taxabl	e	\$Charge		_
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Description Tax Rate Apply To \$Tax															
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Sales Tax-Ker	ntucky	8	Customer	mer Sell 👻 🗌 Include Tax 0.00 😑											
Total I	List:	123,9	964.00		Total	Dealer:		53,286.48		Total C	ustomer:		61,388.34		
Total Dealer Charge: 200.00 Total Customer Charge: 6,297.18															
Total Dealer Tax: 0.00 Total Customer Tax: 5,678.42															
Total Dealer Order: 53,486.48 Total Customer Order: 73,363.95															

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.

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 possibility of what your report can look like with images added to it.



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.				ртојесцианта
	S	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	s: \$123,964.00	\$53,286.48	\$61,388.34	\$8,101.86

FINANCIAL REPORT	BY
TAG	

Summary by Part Number	
g Life Chair Armless, Grou Pace & Lovers, No Lumbar, Grou Hard Caster, h	
g Life Chair Armless, Grey Pace & Lovers, No Lumbar, Grey Hard Carter, h	
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Grade 1, Platinum, Left, Lock Number 1	
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PART DETAIL REPORT

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enter the title.

Projectiviatrix

Summary by Part Number

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KSS	Knoll Office	e Seating		
55C3-	-6-AHK-GH	Life Ch	iair, 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%	
Locat	tion:		Options Per	<u>QTY</u>
Offic	ce 03		COL: Sunset, SEAT: Ultra Seat Topper, UPH: Cal 133, SEAT: Alignment (A), COL: Straw, BACK: with Back Topper, BACK: TBA (A)	2
Offic	ce 03			2
SAMF	PLE			
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%	
<u>Locat</u>	tion:		Options Per	<u>QTY</u>
Offic	ce 01		Grade 1, Platinum, Left, Lock Number 1	3
<u>Locat</u> Offic	tion: ce 01		<u>Options Per</u> Grade 1, Platinum, Left, Lock Number 1	

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.



TWIPS AND TRICKS



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.

- - 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

• In the Reports tab, click on the piece of paper to create a new report.

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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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.

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.

Left Side Tabs

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.

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 <u>here for a TWIPS calculator</u>.



WATCH THIS VIDEO ON THE PROPERTY TAB

TWIPS AND TRICKS

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TWIPS AND TRICKS

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

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.

Top Tabs

ARRANGE

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 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.



ARRANGING FIELDS IN YOUR REPORT

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

PRINT TEMPLATE EDITOR

SORTING GROUPING AND SUBTOTALING.



2 LF-2-36 Laberal Files 2 High 36" paint Gr	Wide ade GR-1 Grade 1 color G1-C Charcoal color Lock Number 1		Desks Square Front 24" X 56
Grade 1 Grade 1 Later Jiles 3 High Pa	Grade GR-2 Metalla Hamk		Finish Grade Grade 2 color Gromets Lock
Grad 4 LF-3-2A 4 LF-3-2A 4 LF-3-2A	High 24" Wide Co.1 Grade 1		2 DSK-R-2460 Desks Square Front 24" X 60"
12 DEVEA	Paint Grade Gin Bedde Grade 1 color 2 Lock Number 4		Finish Grade Wood Finish Gromets Lock
Matrix		Drder #: Dealer Job Number Date Printed: 8/12/2020	esks Square Front 24" X 72" Finish Grade GF Wood Finish M Gromets F Lock 22
2 ati, OH 45242 4-1665		Name: Larry Berton e: 513-554-1665	-24 I Files 2 High 24" Wide Paint Grade GR- Grade 1 color G1-I Lock 1
TALL /field Public Library 3 ABC Street acinnati, OH 45242		on Tuesday	es 2 High 24" Wide Paint Grade GR-2 Grade 2 color G2-GT Lock 1
ILL OF MAT	ERIALS		High 30" Wide Paint Grade GR-2 ade 2 color G2-GT Lock 3
π			Print Templates1.pmx
8056 pw Front 30" X 56"			
Finish Grade GR-2 Grade 2 color G2-RR Gromets R Lock 1	Grade 2 Rusty Red Right Lock Number 1		
Bow Front 30" X 60" Finish Grade GR-3	Grade 3	TWIPS AND TRICK	KS

DSK-D

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.

- following into your field
 - "label" & (field)
- Date formats
 - - 1/1/2020
 - - 1-Jan-20

```
• To combine a "label" and a "field" you can type the
```

```
a. Format(Now, "Short Date")
```

```
b.Format(Now, "Medium Date")
```

```
c.Format(Now, "Long Date")
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Wednesday, Januray 1, 2020

• Add % to the END of a field (Be sure to remove the

formatting of currency or #.00_

• FORMAT(FIELD, "#.00") & "%"

You can a Click on th

ADD BOUND IMAGE

ADDING IMAGES FROM THE SPREADSHEET



TWIPS AND TRICKS

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

Click on the Add Bound Image Icon and select from



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.

TWIPS AND TRICKS



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