# CornerstoneSmallBuilding Innovative Business Solutions on a Solid Foundation

## Quote

[Full Company Name] SF Management *Enhancements*  [Date]

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Cornerstone Technologies Group (“CTG”) is pleased to provide the following quote for SF Management enhancements. This quote is being given in response to a request made by [Name of CIO] and from a fact finding meeting with [Individual Client Name] on Tuesday, April 3, xxxx.

The enhancements as outlined in the quote will allow for current and historical booking’s data, a comparison of forecast sales to bookings, and an additional sort/group capability based on blade material. Five variance reports – reports that compare forecast to bookings – and three master listings reports – reports that give a simple list of bookings for the time period selected – are also quoted. Two days are being estimated for installation and testing of the completed changes. One day is quoted for assisting the appropriate individual in uploading Smart Forecast data assuming that this data can be extracted on a year/month/customer/product basis. (Separate Excel or Text files for each customer is assumed.) Two days are dedicated to individual or group training sessions.

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| --- | --- | --- |
| ***SF Management Enhancement Quote*** | ***Hours*** | ***Cost*** |
| Application Development |  |  |
| 1a. New table for bookings to follow monthly sales design of one record per year/month/customer/product combination. The table would include the following fields: year, month, customer number, part number, quantity, gross dollars, net dollars, and discount amount.1b. New data entry screen to allow the *viewing* of bookings.\* (All adjustments will need to be made in Point.Man. and then re-uploaded into SQL Server.) 1c. Menu changes to place bookings option on SF Management custom menu bar. | 4 | $xxx. |
| 2a. New queries to upload bookings from Point.Man in the SFUpload.MDB file.2b. Form changes to include bookings upload.2c. Macro changes to include bookings upload.2d. Comparison and testing against Crystal reports data2e. Upload of booking history from 1999 to YTD 2001 | 16 | $x,xxx. |
| 3a. Variance reports comparing bookings to forecast sorted and grouped …* By Item Number
* By Product Family
* By Pattern
* By Pattern and Blade Classification
* By Customer Type

3b. Filter form to select report data based on date range. | 16 | $x,xxx. |
| 4a. “Master” reports for bookings i.e. reports that print only booking information without additional analysis sorted and grouped …* By Customer Code
* By Item Number
* By Product Family

4b. Filter form to select report data based on date range. | 4 | $xxx. |
| 5a. Blade material classification added to SQL Server product file. This additional product classification is needed for bookings-to-forecast analysis. See #3 bullet, point four.5b. Product Master Screen layout change to include blade classification field | 2 | $xxx. |
| Total Application Development | **42** | **$x,xxx.** |

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| ***SF Management Enhancement Quote (cont.)*** | ***Hours*** | ***Cost*** |
| Installation, Testing, & Training |  |  |
| 1. On site at Case for installation of modifications (as listed above) and testing. This line item is a “cushion” for unanticipated issues. Case will only be charged, of course, for the actual time used. | 16 | $x,xxx. |
| 2. User Guide revisions to reflect new bookings section | 4 | $xxx. |
| 3. On site at Case for additional training as requested (optional, but highly recommended) | 16 | $x,xxx. |
| Total Installation, Testing, & Training | **36** | **$x,xxx.** |
| Total SF Management Enhancement Quote | **78** | **$x,xxx.** |

\* This quote does not include modifications to existing screens, such as Customers or Products that currently include a subform for Forecast and Monthly Sales. As quoted, these existing screens will not include a third subform for bookings primary due to space. If requested, a button can be added that will call a bookings pop-up form for the current record (customer, part etc.).

This quote is being supplied by CTG and represents a commitment of services to be provided as detailed in the above table. Additional enhancement requests will be handled via. a Change Request Document, and the appropriate approval gained from the SF Management project manager prior to implementation. Services will be billed on a weekly basis as customary to CTG billing procedures.

**Approval: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

######  [Full Company Name] Date

######  Project Coordinator

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 **Cornerstone Technologies Group Date**

 **[Consultant Name]**

 **[Consultant Phone Number]**