

# 10



## Offers

Preparing Offers can be a complicated process given the different goals that must be achieved in a limited amount of time:

- The Offer must go out to the client quickly,
- The Offer must look attractive,
- The format must be consistent with your company's corporate image,
- The handling of the Offer must be patterned after your departments' business rules (e.g. whether you send it by mail or fax, whether it is the first Offer, or a follow-up Offer, etc.).

PRIMO can manage all of these goals for you. By using layouts, creating an Offer is reduced to a few mouse-clicks. Therefore, it is essential that all layouts (and eventually, sub-layouts) be properly set up before Offers are created. To learn how to create Offer layouts, see [Chapter 13, "Layouts"](#).

## Overview

PRIMO provides two ways of creating Offers:

- You may offer several Properties to one client, or,
- You may offer one Property to several clients.

Different prerequisites apply depending upon which of the above options you choose:

- The first way of creating an Offer is from a Requirement record. Initial Offers to a client are usually prepared in this manner. You should also create an Offer from the Requirement record if a client's requirements change, or you wish to offer further Properties to this client.
- The second way of creating an Offer is from the Property record. This would normally occur, for example, immediately after having entered a new Property record which needs to be offered for the first time. In general, the matched Requirement records will probably already have received initial Property offers, so you would probably want to choose a different Offer layout for the offers.

➔ **Tip:**

Preparing and sending offers, from data entry through to licking the stamp, whether it be from a Requirement or a Property record, takes some time to understand. However, once you understand the process, you will not need more than a few minutes.

## Creating an Offer from the Requirement Record

You should create an Offer from a Requirement record when there are several Properties that you would like to send a particular client. This is often the case for initial Offers.

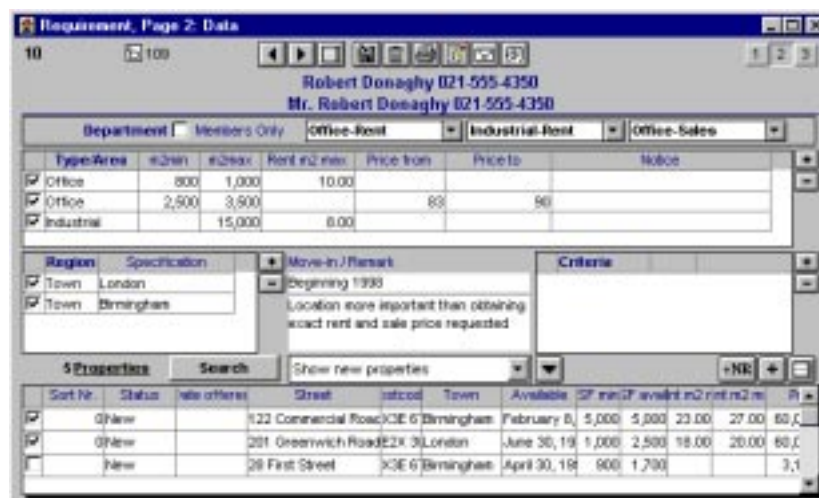


Fig. 10-1: Requirement:Data page

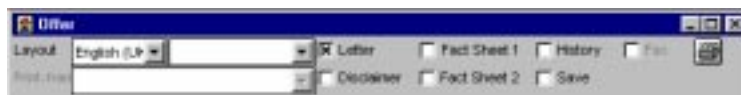
- ✓ **Prerequisite:**  
 You have created the Requirement record you will be using to create the Offer. You have entered search criteria on the *Requirement:Data* page, and have successfully found a list of matching Properties. You have gone over the list of Properties and check-marked those you wish to offer (cf. [section entitled “Matching Section”, Chapter 4, “Requirements”, page 4-20](#)).
1. Click on the “offer” icon (☰) located on the Requirement record toolbar.  
 If you have not selected at least one Property to offer, you will get the following message:



**Fig. 10-2:** Message Box: No “Properties to print” were found

Click on “OK” and select the Properties you wish to offer. Click on the “☰” icon once again.

PRIMO will open the integrated word-processor to a blank *Offer* page. Look at the record header:



**Fig. 10-3:** *Offer* page Record Header (Offer created from Requirement record)

There are several check-boxes, some of which will automatically be activated when you first come to the page. You may activate or deactivate a check-box by clicking in each box. The check-boxes are explained below:

**Letter:** This option is automatically activated by PRIMO, since, as a rule, a letter is always sent out with an Offer.

**Fact Sheet 1:** Activate this check-box if you would like to send this fact sheet with your Offer (both fact sheets can be attached to the Offer).

**Fact Sheet 2:** Activate this check-box if you would like to send this fact sheet with your Offer (both fact sheets can be attached to the Offer).

**History:** Depending upon your Program Administrator, this check-box may be automatically activated whenever you create an Offer (cf. [section entitled “During Offer: Create History-Activity Record”, Chapter 15, “Administration”, page 15-6](#)). Activating this check-box will create a history for the Offer you have created and will list it on the *Activities* page of both the Requirement and Property records in question. When the “History” check-box is deactivated no history is created. This is especially useful if you wish to print an Offer to preview it before printing the final version.

→ **Tip:**

When creating a history for an Offer, PRIMO only creates one activity of the type "History". All Property and Requirement records affected by the Offer will automatically be linked to the activity record through the Existing Links section. Therefore, if you wish to remove an activity of the type "History" from the *Activities* page of a Property or Requirement record, you must open the activity record in question to page 1 and remove the link that exists between the record you are on and the history-activity record. Do not delete the activity itself, unless you mean to delete it completely from PRIMO!

**Save:** You can only use this option if you have activated the "History" check-box. Checking the "Save" check-box allows you to save the Offer letter to the *Activity:Letter* page of the history that is created.

**Disclaimer:** Activating this check-box will allow you to print a disclaimer that you can add to the Offer you are sending to a client. The disclaimer will always be the last page to be printed. A disclaimer layout must be created ahead of time if you wish to use this option (cf. [section entitled "Understanding, Creating and Using Layouts", Chapter 13, "Layouts", page 13-3](#)).

2. Activate and deactivate the check-boxes mentioned above by clicking in them with the mouse.
3. Choose a layout and a print-frame (the print-frame option is not available for all versions of PRIMO) from the appropriate drop down lists.

The layout you have selected is automatically merged to show a completed Offer letter. Any necessary modifications may be done manually (cf. [Chapter 9, "Word-Processor"](#)).

4. To print the Offer, click on the "print" icon located on the right of the *Offer* page header. If you do not wish to print a hard copy of the Offer, but only wish to save the document and create a history of the Offer you have created, you must still click on the "print" icon to achieve this.

Whether you print the Offer to file, paper or both, when you click on the "print" icon the following dialogue box will open containing a set of blank fields for you to fill:



**Fig. 10-4:** Dialogue Box: "History-Activity Options"

- "In how many days would you like to review this activity?" A default number will already have been set by your Program Administrator and this number is automatically entered in the field (cf. [section entitled "Days till review of Offers"](#),

[Chapter 15, "Administration", page 15-4](#)). However, you may change the number of days manually, or leave the field empty if you do not need to be reminded of this Offer.

- **"Who should review this activity?"** By default, the name of the user who created the Offer will be entered in this field. You may select another user if you wish.
  - **"Regarding..."** By default the name of the Offer layout is entered as a reference for any Offer you create. However, you may enter a more complete reference in the "Regarding" field. Any information entered in this field will automatically be entered in the "Regarding" field on page 1 of the history-activity record.
5. Make sure that the information you have entered is correct and click on "OK".  
If you click on "Cancel", the entire Offer process is halted and the Offer is neither printed nor saved. You may then redo steps 2 to 5.

Finally, the following will occur depending upon the check-boxes you activated and the information you entered in the "History-Activity Options" dialogue box fields:

- If you activated the "History" check-box, then a history-activity will be created when you print an Offer. This activity will be automatically linked to the appropriate Requirement and Property records. Furthermore, your Program Administrator may have activated an option that would also connect the history-activity to the pertinent Organisation records (cf. [section entitled "Nachweise mit Stammdatensatz verbinden", Chapter 15, "Administration", page 15-7](#)).
- If you activated the "Save" check-box, then any text entered on the *Offer* page will be saved on the *Activity:Letter* page.
- If you requested to be reminded of the Offer after a certain number of days, PRIMO will alert you on the appropriate day.
- Any information you entered in "Regarding" field of the "History-Activity Options" dialogue box will be transferred to the "Regarding" field on the page 1 of the activity record.
- Any documents you selected for printing will be printed.

## Creating an Offer from the Property Record

You should create an Offer from a Property record when you wish to Offer one Property to more than one client. This is often the case when working with a new Property record. In general, the clients whose Requirement records match the current Property record will probably already have received other Property offers, so you would probably want to choose a different Offer layout for the Offers.

✓ **Prerequisite:**

You have entered the necessary property information in the Property record you wish to offer. (Note that you do not have to link a Property record to a Contact.) The Requirements that match the Property in question are listed in the match list located on the *Property:Data* page. You have looked over the Requirement records

in the list and have check-marked the ones whose Contacts should receive this Property offer (cf. section entitled “Matching Section”, Chapter 3, “Properties”, page 3-17).



Fig. 10-5: *Property:Data* page

1. Click on the “offer” icon (☐) on the Property record toolbar.  
If you have not selected a Requirement record, you will get the following message:

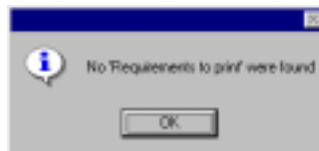


Fig. 10-6: Message Box: No “Requirements to print” were found

Click on “OK” and select the Requirement records for those clients to whom you wish to send an Offer. Click on the ☐ icon once again.

PRIMO will open the integrated word-processor to a blank *Offer* page. Look at the record header:



Fig. 10-7: *Offer* page Record Header (Offer created from Property record)

Whether you create an Offer from a Requirement record or a Property record the check-box options on the *Offer* page remain the same. For more information about

check-box options, see [section entitled “Creating an Offer from the Requirement Record” in this chapter, page 10-2](#). There is a difference, however, when it comes to the “History-Activity Options” dialogue box:



**Fig. 10-8:** Dialogue Box: “History-Activity Options”

When you create an Offer from a Property record, you may be offering the Property to more than one client (more than one Requirement record). Therefore, the “History-Activity Options” dialogue box takes this into consideration when giving you the choice of selecting a user responsible for reviewing and following up on the Offer you have sent out. You can either select a specific user from the drop down list or you can choose “[Requirement agent]”. By selecting the latter, you are ensuring that each user whose client received an Offer from you will be alerted by PRIMO when it is time to follow up on the Offer you sent.

2. Activate the appropriate check-box options (cf. [section entitled “Creating an Offer from the Requirement Record” in this chapter, page 10-2](#)).
3. Select a layout from the “Layout” drop down list.

The layout will be loaded into the word-processor and then automatically merged with the address of the first client you selected from the match list on the *Property:Data* page. Once the layout is merged you may customise the document manually.

There are three different possibilities and procedures when dealing with Offers:

- **Example A:** A Property is being offered to one client only. Therefore only one Offer will be created when the layout is merged.
- **Example B:** A Property is being offered to several clients. Therefore, more than one Offer will be created, since each client will be receiving an Offer addressed to him or her. In this case, you should view the Offers being sent out to the various clients as a single batch. Changes should be made to the layout and not the first document you view, as any changes you make to the first document will not apply to the other documents in the print batch. However, any check-box options you activate in the *Offer* page record header will apply to every Offer being sent out. The same applies to any information you enter in the “History-Activity Options” dialogue box.
- **Example C:** Although the same Property is being offered to several clients, each Offer needs to be individualised. In this case you may need to modify each Offer

separately, as well as activate different check-box options depending on the Offer. Lastly, you may want to enter different information from one "History-Activity Options" dialogue box to another.

*Example A:*

4. Make any necessary modifications to the merged Offer layout.
5. Activate the appropriate check-boxes then click on the print icon to start the printing process.
6. If you have activated the "History" check-box then the "History-Activity Options" dialogue will open when you click on the "print" icon. Enter information in the data fields as needed.

*Example B:*

7. Review the Offer that appears on the *Offer* page. Make sure you are happy with the layout merge of the first document, as you will not be viewing the other documents in the print batch. Click on the "All" print icon located on the far right of the record header.



**Important:**

Since you will not be viewing the other Offers that need to be printed, you must make sure ahead of time that the layout you have chosen can apply to all the records you wish to print (e.g. some addresses might take up three lines and others four).

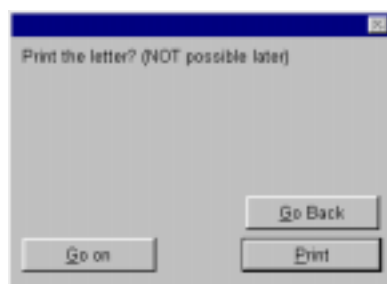
8. Any check-box options you activate when reviewing the first document will apply to all the documents in the group.
9. If you have activated the "History" check-box, the "History-Activity Options" dialogue will open when you click on the "All" print icon. Any information you enter in the dialogue box data fields will apply to the batch of Offers you are printing.

*Example C:*

10. Review the first Offer that appears on the *Offer* page once the Offer layout is merged.
11. Activate the check-box options that will apply to this document.
12. Print the document by clicking on the "1" print icon located on the record header.
13. If you have activated the "History" check-box then the "History-Activity Options" dialogue will open when you click on the "1" print icon. Information you enter in the dialogue box will apply to this document only.
14. Once you have printed the first Offer, the second one appears in the word-processor. Reapply steps 10 through 13 if you wish to continue reviewing and printing each Offer separately. If you wish to print the rest of the Offers as a group, click on the "All" print icon when you reach step 11. The remaining Offers will be printed as a group and any options you activated when you reviewed the Offer will apply to all the Offers in that group. Finally, any information you enter in the "History-Activity Options" dialogue box will apply to all the Offers in the group. Keep in mind, however, that any customisations to the letter will be lost.

**Important:**

You can also review each Offer separately by clicking on the "arrow" icon located to the right of the record header, below the print icons. To the left of the arrow are two numbers. The first number indicates which Offer you are viewing, the second indicates the total number of Offers. However, if you use the arrow to go through the Offers, you must print them as you review them since you cannot go back to print an Offer once you have reviewed it. The arrow lets you go forward through the Offers, not backwards. If you try to go to the next Offer without printing the one you are on, the following dialogue box will open:



**Fig. 10-9:** Dialogue Box: "Print the letter? (NOT possible later)"

The [section entitled "Angebot ohne Auskunft über den Standort", Chapter 13, "Layouts", page 13-23](#) gives a good example of how to create an Offer. It is especially useful in learning how to work with Offer layouts.

## History-Activity Record

As a rule, regardless of whether you create an Offer from a Requirement record or a Property record, PRIMO will produce a history for every Offer created. Whether or not a history is created and what type of history is created depends on the following:

- Your Program Administrator will decide whether single histories, multiple histories, or both, are created whenever you create an Offer. Only the Program Administrator can change the type of histories that are created (cf. [section entitled "Nachweis erstellen beim Angebot", Chapter 15, "Administration", page 15-6](#)).
- If you have activated the "History" check-box, you can also choose to activate the "Save" check-box. Activating this check-box will save the letter on the *Offer* page to the *Activity:Letter* page when it creates a history-activity.

An automatically created history-activity will contain (depending upon your selections and any default options set by the Program Administrator) the following information in the "Regarding" and "Remark" fields located on page 1 of the activity:

- "Regarding" Field: [Layoutname] and any additional text you may have added.
- "Remark" Field: Requirement client name and record number, and Property street address and record number. (Depending on the number of Properties offered, more than one Property may be listed).

## Using Offers Creatively

Although the main purpose of the PRIMO Offer option is to match Properties to Requirements set by existing and potential clients, it is also possible to use the Offer option for other purposes. It could be used as a method for sharing information or contracts with other businesses.

*Example:*

In order to advertise a set of Properties in a newspaper you would proceed as follows:

✓ **Prerequisite:**

You have created an Organisation record for the newspaper you will be using for your advertising.

1. Go to the *Requirements* page of the Organisation record and create a new Requirement for that Organisation (you are actually creating a Requirement in the newspaper's name).
2. Enter the necessary information in the *Requirement:Address* page then go to the *Requirement:Data* page.

Do not enter any data in the Data, Region and Criteria boxes on the *Requirement:Data* page, since you are not trying to match Properties to a specific set of Requirements. However, you should enter the purpose of the Requirement in the "Remark" field. For example, "FOR ADVERTISING PURPOSES ONLY".

3. Click on the "list" icon located above the match list in order to open a *Property Search and List* window. Select the Properties you wish to *offer* and bring them into the Requirement record match list by selecting "Offer Properties" from the pop-up menu located on the list toolbar.

The normal matching process is not applicable due to the reasons mentioned in Step 2.

4. Select the Properties you wish to *offer* to the newspaper and click on the "offer" icon located on the record toolbar.
5. Select the most appropriate layout for the type of advertising you will be placing in the newspaper. Your Offer layout may include a Property sub-layout which, once merged, will insert specific and formatted information about the Properties you are advertising into the advertisement you have created. To insert a sub-layout into a layout you have to select «@Layoutname» from the place-holder menu («...») located on the layout word-processor toolbar.

To learn more about how and when to insert sub-layouts into layouts see [section entitled "Creating Sub-Layouts using Property Documents", Chapter 13, "Layouts", page 13-18](#)

In the section entitled "Property Document Activator", Chapter 13, "Layouts", page 13-25 you will find a complete step-by-step example of how to create a layout for newspaper advertising purposes. You are also given different examples of when you should or should not follow certain steps (section entitled "What do I do?", Chapter 13, "Layouts", page 13-22).