**KEN GO OVER CONTACTS & COMPANIES**

**Raspberry/Brief** = This is where leads go. May also say brief.

**Proposal** = Current client projects must start here. This may also be an estimate. A project can immediately be created once this is submitted.

**Campaign** or **Project:** Can be created here. You don’t create a project or campaign until proposal is approved. You cannot create a project without a proposal.   
**Timeline**: Tasks are preloaded.

**Time track**: That can happen without a timeline.

**Invoice**: You can invoice from the time tracking or from a timeline.

1. **Lead comes in.** Add a request and fill out all of the information you know. Blue bars indicates required. Select the template – these are preloaded and determine what questions appear when you submit this form.
   1. **Budget:** What the client tell us their budget is
   2. **Delivery Date**: The date the client needs the project finished
   3. **Compensation**: Not required.
2. **Hit submit!** Automatically loads the built in questions for website. Client info on page 1, internal office info on page 2.
3. **Hit Submit**  to save your request. You CAN go back to edit details.
4. **We’re going to make a proposal based on our client conversation.** Update the status. Click Actions in top left corner, create proposal.
5. **Fill out the info**.
   1. **Proposal type**.
   2. **\*\*What if the proposal includes multiple types**?
   3. **Close Probability**: The chance that the proposal will be accepted by the client. Out of 100.
   4. **Month Close:** The month that we think the client is going to say yes/no.
   5. **Delivery date:** When they need the project completed by
   6. **Category:** How billing will be structured.
   7. **Select Service Groups**: This is where we add the categories and is what Ellen would typically add to replicon. You can go back and edit these. You can also track media here…That’s confusing.
6. **Hit Submit!** Onto the financials. This is where you put all of the information for all of the individual sections. This is where you would take the information from the internal web work order and plug the numbers in. You’ll get your internal total.
7. Click Enter by Qty & Rate on the profit line. Set qty to $10,350, set the rate to .20. Enter cost. And that automatically generates the additional 20%. DO NOT OUSE THE FIELDS IN THIS PROFIT LINE. You may also manually enter the cost. \*\*what about proposals that have three options for payment. Please note these numbers are adjustable. As a rule of thumb, we will always plug budget B in for web quotes.
8. Print simple will give you a version of what the client will see. Detailed version includes profit.
9. **Once budget is done**, you’ll go to the bar above and move to the next menu item. Revnue Schedule.
10. **Revenue schedule**. Allows accnt manager to say how long the project will last, and set up the billing schedule. Look to the left and use those numbers to plugin. Allows us to see how much money we are bringing in each month.
    1. **Internal expense**: All of your in house stuff. Anything like team meeting, huddle, etc.
11. Change to submitted once you’ve sent to client. Once the client portal is in use, we can submit the proposal through the portal.
12. Approved! Select to approve. Notice pops up. Always just click continue. Don’t even worry.
13. Once approved, create a project from the upper right button. Auto fills as much info as possible.
14. (Each client will have a project for ongoing, unexpected work. For example, if a client calls needing a small edit on a closed project, we can attach that task that the ongoing projects.)
15. Once a project has been created you can add a timeline. Generates a list of predetermined tasks that need to be assigned to people.

**------ January 24, 201 ------ Part 2**

Entering external expenses.

External expense 🡪 add an expense. For example, if we buy a newspaper ad.

We can enter the buy into FP. Ellen will enter bill into FP once it arrives.

* Day you made the buy.
* Reference # is the actual invoice # so account team won’t add this
* Accounts payable is charge to.
* Attach to project
* Service Group – it’ll determine the service group based on what project you choose. (fields in replicon)
* Expense Type – Media
* Media Resale (COGS)
* Dates, name of ad, etc. in description.
* Supplier vendor Invoice: fill in the yellow bar. How many, at what rate, for what amount total. Sales Tax – Tax Exempt
* Save.
* Status will start as unposted. At this point, you’ve told the finance team that this buy exists. It means it hasn’t been brought over to Quick Books. LEAVE IT AS UNPOSTED!!!!
* Once exported to QuickBooks,

ALL LEADS WILL GO INTO REQUESTS.

ALL CURRENT CLIENTS WILL GO INTO PROPOSAL.