

PROPOSAL – LINE ITEM REPORT

OVERVIEW

Due to data limitations, the “Proposal” report delivered in initial release of SI5 does not support aggregation of items. This is due to the fact that we allow for the showing of package detail and equipment item accessories in-line. When two instances of a package are added to a project and the contents of those instances are subsequently changed, aggregating and showing detail for the packages becomes inherently difficult due to the singular key on items of manufacturer, model, and category.

D-Tools is currently working to resolve this issue. In the interim, a report based on the “Line Item Detail” report has been created that will iterate over the “Proposal Items” and aggregate packages and equipment items.

The exported report has been copied to the following location:

http://downloads.d-tools.com/si5/reports/Proposals/Proposal_Line_Item.zip

LIMITATIONS

There are a few of limitations to this report. They are as follows:

- Package Item Detail is not available in the report.
- Equipment Accessory Detail is not available in the report.

These limitations are currently being addressed in an upcoming service pack.

EXCLUSIONS

This report is built to demonstrate how we can immediately solve the aggregation issue for **some** of our customers until the more fully developed solution can be delivered.

With that in mind, the following exclusions apply to this report:

- It does not contain images for items in the report.
- It displays unit price, not install price
- It displays items with a price of \$0.00.

The modifications described above have been documented in other reporting related documents and may be applied to this report for further customizations.