



## Design Manager Help Article

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<b>Title/Subject:</b>	<b>Proposal and Invoice Format Styles</b>
<b>Category:</b>	DM and DM Pro
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Design Manager offers three styles of Proposals and Invoices to send to your Clients – **Residential, Commercial and Modern (Modern is for CLOUD users ONLY).**

- The Residential format is designed to appear more like personal correspondence in Times New Roman 10 pt font with a picture sized at approximately 2 in x 2 in.
- The Commercial format is fashioned in Arial 10 pt font with a traditional “industrial” layout including grids for the columns much as an Invoice from your Vendor may appear. This format also has pictures sized at approximately 2 in x 2 in.
- The Modern format gives a fresh/modern look and gives you the ability to center your logo on the document, like most common letterhead – it uses the Calibri font and is primarily pt 11. Pictures are sized at approximately 1.5 in x 1.5 in.

NOTE: The Modern format is not designed to be mailed as it does not align perfectly with the recommended window envelopes. This format was created for the user who emails documents.

You can choose **any of these** formats exclusively, vary the format from Project to Project, or even within a single Project. You do **not** have to use the Commercial format for your Commercial Projects nor the Residential format for your Residential Projects. The format you select is entirely based upon which one you, and your Client, prefer!

See the links below for how to change your default document style:

[DMCloud](#)

[DMProCloud](#)

Examples of the Residential, Commercial and Modern Proposals are shown below:

# Residential Proposal:



**Vita Nova Designs**  
 23 North Green St.  
 Princeton, NJ 08542  
 Phone: (609) 255-3000 Fax: (609) 255-3001

**Proposal**  
 TES01 / Cameron Long Island Home  
 Proposal No.: 0001  
 April 14, 2016  
 Page 1 of 1

**To:** Emily Cameron  
 123 Main Street  
 Long Island City, NY 11101

**Site:** Emily Cameron  
 123 Main Street  
 Long Island City, NY 11101

Quantity	Description	Unit Price	Extended Price
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**Office**

1 each	Tripod 1 Light Decorative Floor Lamp in French Wax on Wood	518.57	518.57
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1 each	Audrey Sofa Sherrill Canet Collection Silverton Mountain LU 0001 8081; Espresso Finish on Legs	2,598.70	2,598.70
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<b>Item Total</b>	3,117.27
<b>Freight</b>	139.00
<b>Sales Tax</b>	293.06
<b>Grand Total</b>	<u>3,549.33</u>

Approved \_\_\_\_\_ Date \_\_\_\_\_

**Requested Deposit** **\$1,774.67**

*Please sign and send back with your deposit. Freight is estimated in the above charges, but actual will be billed at final invoice.*

# Commercial Proposal:





**Vita Nova Designs**  
 23 North Green St.  
 Princeton, NJ 08542  
 Phone: (609) 255-3000 Fax: (609) 255-3001

**Proposal**  
 TES01 / Cameron Long Island Home  
 Proposal No.: 0001  
 4/14/2016  
 Page 1 of 1

**To:** Emily Cameron  
 123 Main Street  
 Long Island City, NY 11101

**Site:** Emily Cameron  
 123 Main Street  
 Long Island City, NY 11101

Quantity	Description	Unit Price	Extended Price
1 each	<b>Office</b> Tripod 1 Light Decorative Floor Lamp in French Wax on Wood 	518.57	518.57
1 each	Audrey Sofa Sherrill Canet Collection Silverton Mountain LU 0001 8081; Espresso Finish on Legs 	2,598.70	2,598.70
	<b>Office</b>		<u>3,117.27</u>

<b>Item Total</b>	3,117.27
<b>Freight</b>	139.00
<b>Sales Tax</b>	293.06
<b>Grand Total</b>	<u>3,549.33</u>
<b>Requested Deposit</b>	<b>\$1,774.67</b>

Approved \_\_\_\_\_ Date \_\_\_\_\_

Please sign and send back with your deposit. Freight is estimated in the above charges, but actual will be billed at final Invoice.

# Modern Proposal:



## Proposal

No. 0001  
TES01 / Cameron Long Island Home

April 14, 2016  
Page 1 of 1

To: Emily Cameron  
123 Main Street  
Long Island City, NY 11101

Site: Emily Cameron  
123 Main Street  
Long Island City, NY 11101

Description	Quantity	Unit Price	Total Price
Tripod 1 Light Decorative Floor Lamp in French Wax on Wood 	1 each	\$518.57	\$518.57
Audrey Sofa Sherrill Canet Collection Silverton Mountain LU 0001 8081; Espresso Finish on Legs 	1 each	\$2,598.70	\$2,598.70
Sub Total:			\$3,117.27
Freight:			\$139.00
Sales Tax:			\$293.06
Total:			<u>\$3,549.33</u>
<b>Deposit Requested:</b>			<b>\$1,774.67</b>

Please sign and send back with your deposit. Freight is estimated above, but actual charges will be billed on final invoice.

Approved \_\_\_\_\_ Date \_\_\_\_\_

Vita Nova Designs | 23 North Green St. | Princeton, NJ 08542 | P (609) 255-3000 | F (609) 255-3001  
www.vitanovadesigns.com | info@vitanovadesigns.com

Each format also has an option to include a column for the Item Deposit – the Requested Deposit for Proposals and Applied Deposit for Invoices. Using this format option allows you to display to the Client exactly how much Deposit is being requested or applied for each individual Item, for Proposals and Invoices, respectively.

Examples of the Modern Proposal and Invoice with the Show Deposit option are shown below:

# Modern Proposal – Show Deposit:



## Proposal

No. 0001



TES01 / Cameron Long Island Home

April 14, 2016

Page 1 of 1

To: Emily Cameron  
123 Main Street  
Long Island City, NY 11101

Site: Emily Cameron  
123 Main Street  
Long Island City, NY 11101

Description	Quantity	Price	Sales Tax	Deposit
Tripod 1 Light Decorative Floor Lamp in French Wax on Wood 	1 each	\$518.57	\$46.67	\$306.60
Audrey Sofa Sherrill Canet Collection Silverton Mountain LU 0001 8081; Espresso Finish on Legs 	1 each	\$2,598.70	\$233.88	\$1,468.07
	Sub Total:	\$3,117.27	<u>\$293.06</u>	<u>\$1,774.67</u>
	Freight:	\$139.00		
	Sales Tax:	\$293.06		
	Total:	<u>\$3,549.33</u>		
	<b>Deposit Requested:</b>	<b>\$1,774.67</b>		

Please sign and send back with your deposit. Freight is estimated above, but actual charges will be billed on final invoice.

Approved \_\_\_\_\_ Date \_\_\_\_\_

Vita Nova Designs | 23 North Green St. | Princeton, NJ 08542 | P (609) 255-3000 | F (609) 255-3001  
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## Modern Invoice - Show Deposit:





### Invoice

No. 10019 / TES01  
Cameron Long Island Home  
Proposal No. 0001

April 28, 2016  
Page 1 of 1

To: Emily Cameron  
123 Main Street  
Long Island City, NY 11101

Site: Emily Cameron  
123 Main Street  
Long Island City, NY 11101

Description	Quantity	Price	Sales Tax	Deposit	Balance
<b>Office</b>					
Tripod 1 Light Decorative Floor Lamp in French Wax on Wood	1 each	\$518.57	\$46.67	\$306.60	\$258.64
					
Ref. No. 0040					
Audrey Sofa Sherrill Canet Collection Silverton Mountain LU 0001 8081; Espresso Finish on Legs	1 each	\$2,598.70	\$233.88	\$1,468.07	\$1,364.51
					
Ref. No. 0050					
Sub Total:		<u>\$3,117.27</u>	<u>\$293.06</u>	<u>\$1,774.67</u>	<u>\$1,635.66</u>
Freight:					<u>\$139.00</u>
Balance Due:					<u>\$1,774.66</u>

\* Denotes nontaxable

Balance is due upon receipt. It has been our pleasure working with you! If you loved your experience please recommend us to your family and friends.

Vita Nova Designs | 23 North Green St. | Princeton, NJ 08542 | P (609) 255-3000 | F (609) 255-3001  
www.vitanovadesigns.com | info@vitanovadesigns.com

There are, however, a few points to consider in regards to clarity of information for the Client...

### Proposals:

With Proposals, the main issue that may arise is if you are collecting 100% Deposit on an Item that contains multiple Component Types (i.e., Merchandise and Freight, Installation, etc.) and select to have the non-Merchandise Types to either **List** or **Total** on the **Project Advanced Options Window – Proposal Tab**. What will happen is the Deposit displayed for the Item may **appear** to **exceed** the total amount of the Item...

Quantity	Description	Price	Sales Tax	Deposit
<b>Master Bedroom</b>				
1 each	Master Bedroom Window Treatment Throw Swag Design Peruvian Orange Accent Fabric Organic Linen Main Fabric Ref. #: 0016	1,275.96	63.80	1,996.86
	Installation & Labor	569.40	28.47	
	<b>Item Total</b>	<u>1,845.36</u>	<u>99.84</u>	<u>1,996.86</u>
	<b>Freight</b>	151.50		
	<b>Subtotal</b>	1,996.86		
	<b>Sales Tax</b>	99.84		
	<b>Grand Total</b>	<u>2,096.70</u>		
	<b>Requested Deposit</b>	\$1,996.86		

Of course, if you add the price of the Merchandise to the Installation & Labor and Freight, the total is 1,996.86 but it may be confusing to the Client. For this reason, it is suggested to set **all** Component Types to **Combine** on the Project Advanced Options Window – Proposal Tab to avoid such confusion.

### Invoices:

For Invoices, a similar issue arises when using **List** or **Total** for Items with multiple Component Types but is exaggerated by the Balance being displayed as a **negative** value for Items that have received 100% Deposit, including Sales Tax, or if a Retainer is being applied to the Invoice as shown below...

Quantity	Description	Price	Sales Tax	Deposit	Balance
<b>Guest Bedroom 1</b>					
1 each	<b>Century Signature Upholstery Collection</b> Beautiful celery green signature collection island pattern with maple frame. <b>Measurements:</b> Width 31 in., Depth 36 in., Height 34 in., Seat Height 20 in., Arm height 25 in. Ref. #: 0001	650.00	32.50	774.90	-92.40
	<b>Item Total</b>	<u>650.00</u>	<u>36.90</u>	<u>774.90</u>	-88.00
	<b>Freight</b>				88.00
	<b>Balance Due</b>				<u>0.00</u>

Only when the Freight is added back into the Balance column in the Totals region does the Balance go to zero. Again, it is suggested to set **all** Component Types to **Combine** on the **Project Advanced Options Window – Invoice Tab** to prevent confusion to the Client.