



# **DIGITAL FACILITIES CORPORATION**

**ProWriter® 3.0**

**Features and Benefits**

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May, 2003

## ProWriter® 3.0 Introduction

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During the last five years there has been and continues to be unrelenting changes in the facility management industry. Building owners have faced mergers, acquisitions, downsizing, global threats and FM personnel are asked to do more with fewer resources.

The roofing industry itself is evolving with a renewed focus on relationships, maintenance and services. Manufacturers continue to add new products and change installation recommendations to increase performance or minimize health and safety risks. The product options from coatings to materials is complex for people in the roofing industry, it is no wonder buyers struggle to sort out the important facts.

Sales roles are changing too. One stop transaction selling is not sufficient in an environment where buyers must understand the problems, their consequences and the purchase options in order to evaluate bids. It may no longer be effective for sales people to maintain loosely organized product information when corporate buyers will require details to support recommendations and educate stakeholders who often participate in significant repair authorizations.

There are over five thousand companies providing roof maintenance and roof replacement services to building owners in North America. These companies provide roofing services to repair, recover or replace aging commercial roofing. Many established companies focus on one or more product systems and work hard to establish their reputations as knowledgeable and quality conscious thereby earning the trust of prospective buyers and an invitation to provide services.

Once the opportunity to provide a proposal for services is given, communication skills become an important part of educating prospective buyers. Whether well defined or informal your sales process usually includes customer contact and a written proposal stating the company's opinion on the existing conditions and outlining options for the customer to consider. Given that many buyers are business people who are uninformed on the mechanics of roofing, the organization and detail of the proposal will be important.

Digital Facilities Corporation has focused on the proposal as a key element in the preparation of a document that helps educate your buyer, communicate the conditions you are evaluating and establish trust while focusing the client on specific recommendations and the value your company is providing.

ProWriter® 3.0 helps you earn their business when the difference between winning and second place often comes down to the details. It provides a format to consistently add detail to help influence the buyers gut feeling; that your company, your analysis of the situation and your recommendations deserve their respect and a contract.

## **ProWriter® 3.0 Overview**

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ProWriter® 3.0 is an easy to use proposal generating program with many added features to enhance the quality of roofing proposals you prepare for your clients.

ProWriter® 3.0 contains over 16 preformatted proposals with single roof and multi-roof versions available. All of these proposals can be customized to suit your needs.

The database is divided into 2 areas the proposal folder and the details folder.

The Proposal folder holds all of the information about the proposal such as client and facility name, photos and layout of the proposal.

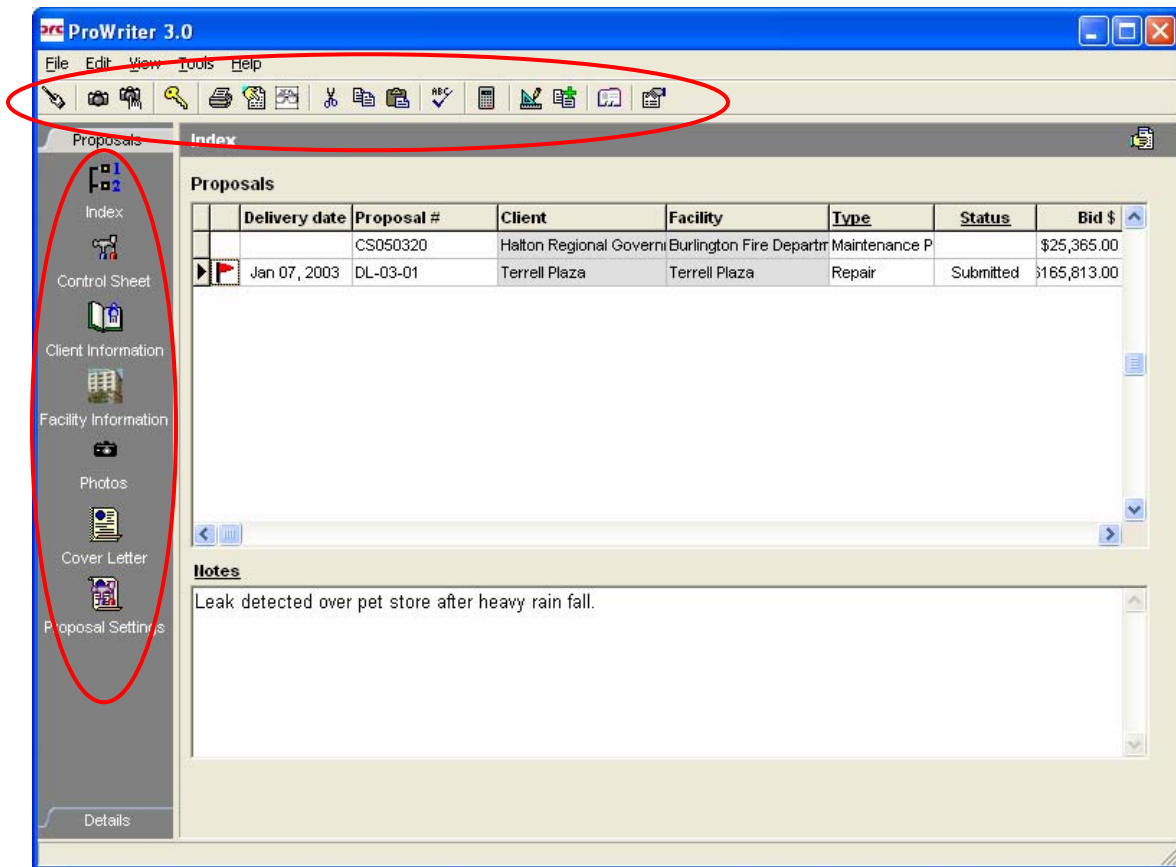
The Details folder holds all of the information about each roof section. The information entered here is usually gathered during an on site roof inspection. ProWriter® 3.0 includes a roof inspection form for use during these inspections. The layout of the inspection form follows the layout of the Details folder making it easy to transfer the information from the form to the ProWriter® 3.0 database.

The ProWriter® 3.0 User manual provides information on the features and functions with a focus on how-to functionality and is included within the application for quick reference.

The following pages outline ProWriter 3.0's screen design and enhanced features.

## ProWriter® 3.0 Screen Design

### ProWriter® 3.0 – Proposal Index Screen



- All ProWriter® 3.0 screens have an Outlook type layout with menu options and toolbar icons across the top and Proposal and Details tabs on the left side of the screen with icons representing the pages within each folder listed below.
- The Proposal Index page is displayed when the application is first started. This page is used to list the proposals in numerical sequence, along with some general details about each proposal.
- The ProWriter® 3.0 toolbar provides quick and easy access to many of ProWriter® 3.0 features and functions
- Each page within ProWriter® 3.0 displays the name of the page along with the proposal number, client and facility name for easy reference

## ProWriter® 3.0 Screen Design

### ProWriter® 3.0 - Control Sheet

ProWriter 3.0

File Edit View Tools Help

Proposals **Control sheet for proposal #: DL-03-01 Client: Terrell Plaza Facility: Terrell Plaza**

Proposal # DL-03-01 Inspection date Jan 05, 2003

Client name Terrell Plaza Delivery date Jan 07, 2003

Facility name Terrell Plaza Close date

Roof name Building A Bid amount \$165,813.00 Calculate

Proposal type Repair Actual amount \$9,543.00

Roof inspector Bill Smith Status Submitted

Notes  Follow-up Date Jan 12, 2003  Rich Text

Leak detected over pet store after heavy rain fall. Call to ensure proposal was received

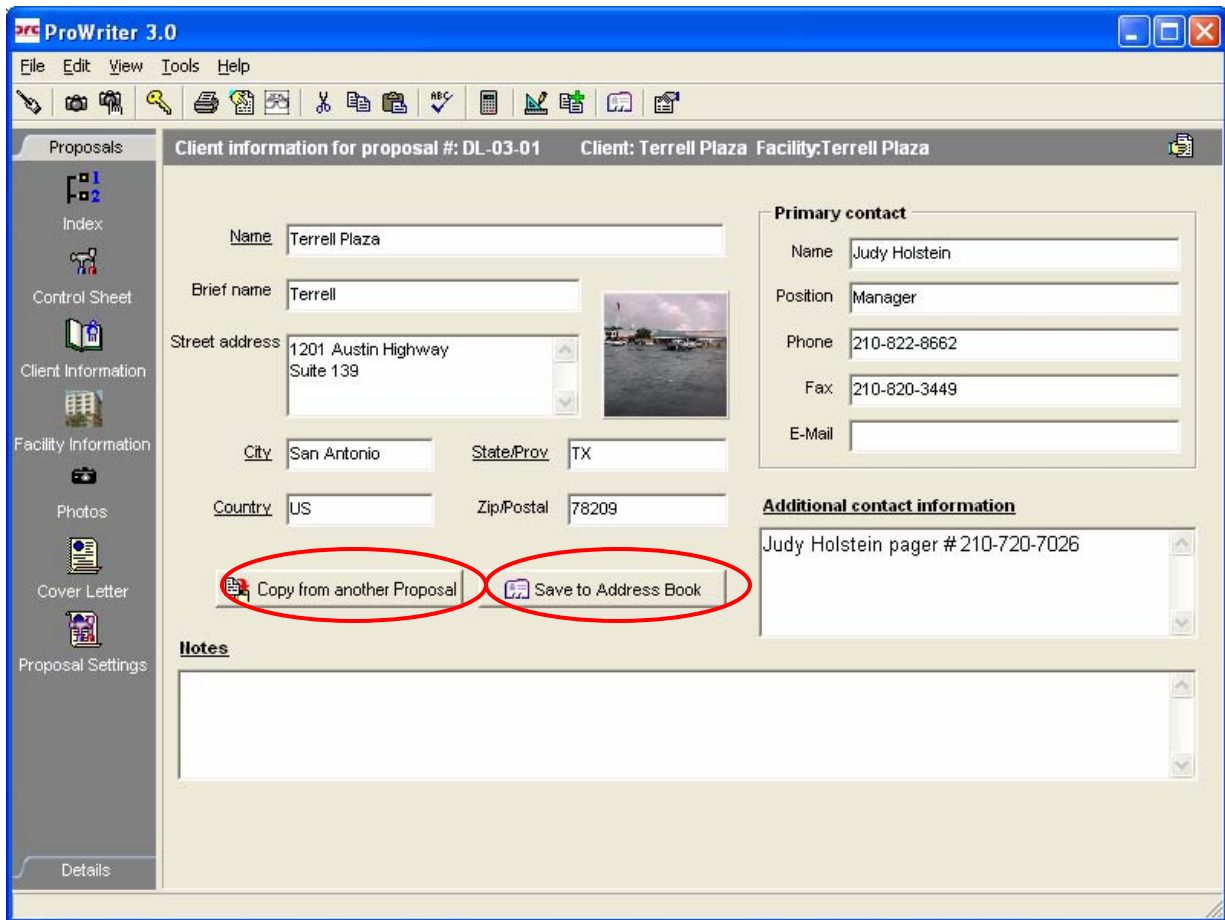
Details

- The Control page of the proposal folder is used for some general information about the proposal
- Title of the page includes the client and facility name as well as the proposal number
- Client and Facility SmartLists link to the ProWriter® 3.0 address book
- Copy details button – copy from another proposal
- Create an Outlook task to remind you of the follow-up details

## ProWriter® 3.0 Screen Design

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### ProWriter® 3.0 - Client Information



The screenshot shows the ProWriter 3.0 software interface. The title bar reads "ProWriter 3.0". The menu bar includes "File", "Edit", "View", "Tools", and "Help". The toolbar contains various icons for editing and file management. The main window displays "Client information for proposal #: DL-03-01" and "Client: Terrell Plaza Facility: Terrell Plaza". The form fields are as follows:

Name	Terrell Plaza	
Brief name	Terrell	
Street address	1201 Austin Highway Suite 139	
City	San Antonio	State/Prov. TX
Country	US	Zip/Postal 78209
Primary contact Name	Judy Holstein	
Primary contact Position	Manager	
Primary contact Phone	210-822-8662	
Primary contact Fax	210-820-3449	
Primary contact E-Mail		
Additional contact information	Judy Holstein pager # 210-720-7026	

At the bottom of the form, there are two buttons circled in red: "Copy from another Proposal" and "Save to Address Book". Below these buttons is a "Notes" section with a large text area.

- The Client information page holds the client name and address as well as contact information and notes
- A Copy button allows you to copy details from an earlier proposal
- Save the address to the address book for use in future proposals

## ProWriter® 3.0 Screen Design

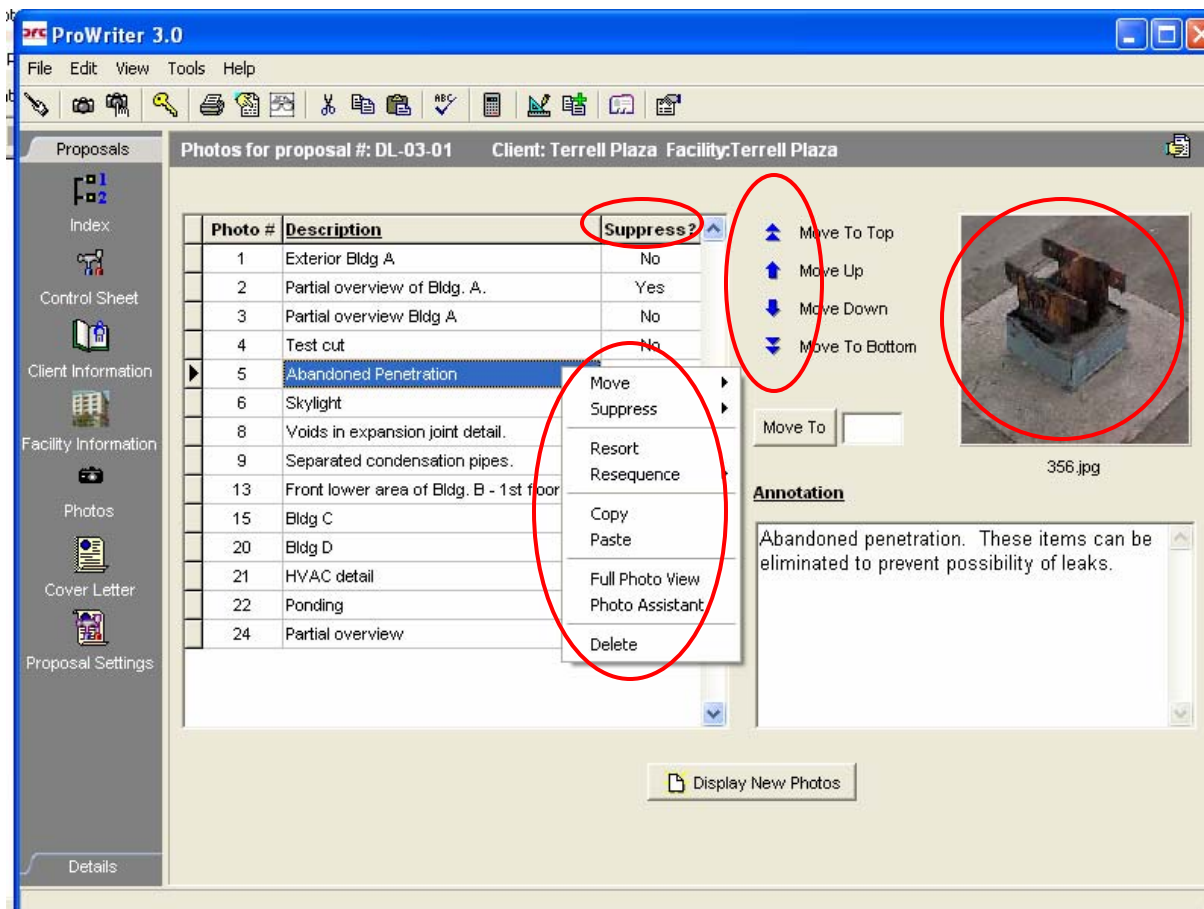
### ProWriter® 3.0 Facility Information

The screenshot shows the ProWriter 3.0 software interface. The main window is titled "ProWriter 3.0" and has a menu bar with "File", "Edit", "View", "Tools", and "Help". Below the menu bar is a toolbar with various icons. The main area is divided into a left sidebar and a main content area. The sidebar contains a "Proposals" section with icons for "Index", "Control Sheet", "Client Information", "Facility Information", "Photos", "Cover Letter", and "Proposal Settings". The main content area is titled "Facility information for proposal #: DL-03-01 Client: Terrell Plaza Facility: Terrell Plaza". It contains several input fields for facility information: "Name" (Terrell Plaza), "Brief name" (Terrell), "Street address" (1201 Austin Highway Suite 139), "City" (San Antonio), "State/Prov" (TX), "Country" (US), and "Zip/Postal" (78209). There is also a "Type of building" dropdown (Shopping Plaza) and a "Neighborhood" dropdown (Commercial). A "Notes" section is at the bottom. On the right, there is a "Primary contact" section with fields for "Name" (Judy Holstein), "Position" (Manager), "Phone" (210-822-8662), "Fax" (210-820-3449), and "E-Mail". Below this is an "Additional contact information" section with a field for "Judy Holstein". A "Client to Facility" dialog box is open, showing a "Copy Information" section with checkboxes for "Name", "Photo", "Address", "Contact", and "Notes". The "Copy From Client" button in the main form is circled in red, and an arrow points to the dialog box. The "Save to Address Book" button is also circled in red.

- The Facility information page is used to store the name, address and contact information of the facility for which the proposal is being created.
- Save the address to the address book for use in future proposals
- If any of the client information is the same it can be copied using the Copy from Client, to select the information you wish to copy.

## ProWriter® 3.0 Screen Design

### ProWriter® 3.0 - Photos Page



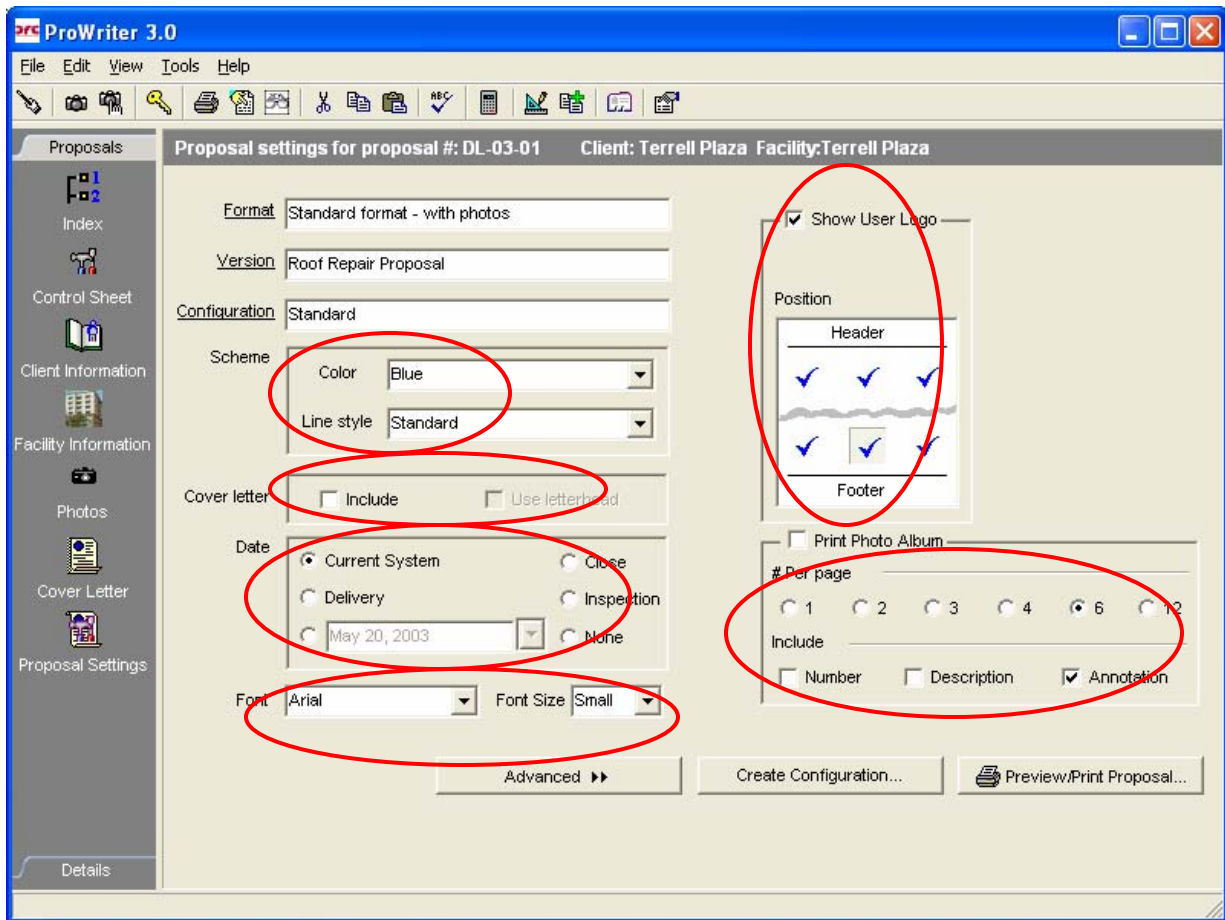
- The photos page is used to store photos for the proposal. Photos are brought into ProWriter® 3.0 in 3 easy steps.
  - Copy and paste into the New ProWriter photos folder on your hard drive from your digital camera or scanner
  - Drag and drop them from the new photos folder to the photos page of the proposal
  - Drag and drop them to the individual detail pages of the proposal

Note ProWriter® 3.0 also includes 3 photos albums which can be shared with all proposals. Use these albums to store photos of typical defects or roof top details.

- Organizing your photos is simple using the move options indicated by the arrows on the page
- Suppress flag allows you to select which photos to print in an album
- Expanded right-click menu makes photo handling easy

## ProWriter® 3.0 Screen Design

### ProWriter® 3.0 - Proposal Settings page



ProWriter® 3.0 contains many predefined reports which can be customized using the proposal settings page.

Visual selection of report options allows you to overwrite system defaults for specific proposals

- Change the color scheme and line style
- Include/exclude a cover letter
- Use letterhead
- Select different date options for the proposal
- Select font and font size for the printed proposal
- Use and position of a Company logo on details pages
- Include/exclude a photo album with the printed proposal with/without photo numbers, descriptions, or annotations.

## ProWriter® 3.0 Screen Design

### ProWriter® 3.0 – Proposal Details Folder

The screenshot displays the ProWriter 3.0 software interface. The window title is "ProWriter 3.0". The menu bar includes "File", "Edit", "View", "Tools", and "Help". The toolbar contains various icons for file operations. The main window is titled "Details for proposal #: DL-03-01 Client: Terrell Plaza Facility: Terrell Plaza". The left sidebar is highlighted with a red oval and contains the following navigation options: "Details", "Index", "Summary", "Roof System", "Roof Top Details", "Membrane Defects", "Moisture Survey", and "Recommendations". The main area displays a table with the following data:

Section	Name	Roof system type	Age	Sq. ft.	Replacement value
A	Building A	Conventional Mod Bit - Hot Applied	13	37,316	\$559,740
B	Building B	BUR (2nd floor level) Modified Bitum	13	65,525	\$982,875
C	Building C	BUR	13	49,330	\$739,950
D	Building D	BUR / Modified Bitumen	13	30,200	\$453,000

At the bottom of the main area, there is a "Totals" section with three input fields for "Roof sections", "Square footage", and "Replacement value".

- The Details folder is where the information about each roof section of the facility is stored.
- There are 7 pages of information within this folder shown on the left of the screen.
- The Index page is used to list the roof sections along with some information about each section. The information in the shaded columns displays as information is entered elsewhere in the database.
- Select a roof section on this page, then click on the other pages in the folder to view the information about the selected roof section

## ProWriter® 3.0 Screen Design

### ProWriter® 3.0 – Summary Page

ProWriter 3.0

File Edit View Tools Help

Summary information for roof section: A Client: Terrell Plaza Facility: Terrell Plaza

Designation: A

Roof name: Building A

Roof size: 37,316 sq. ft.

Est. replacement cost: \$15.00 per sq. ft.

Est. total replacement cost: \$559,740 (calculated)

Existing system type: Conventional Mod Bit - Hot Applied

Year installed: 1990

Height: 25 ft. Slope: 1/8" in 12

Leak sensitivity under roof: Normal

Roof condition rating: Poor

Currently leaking? Yes (selected), No, Unknown

Drainage: Adequate (selected), Inadequate

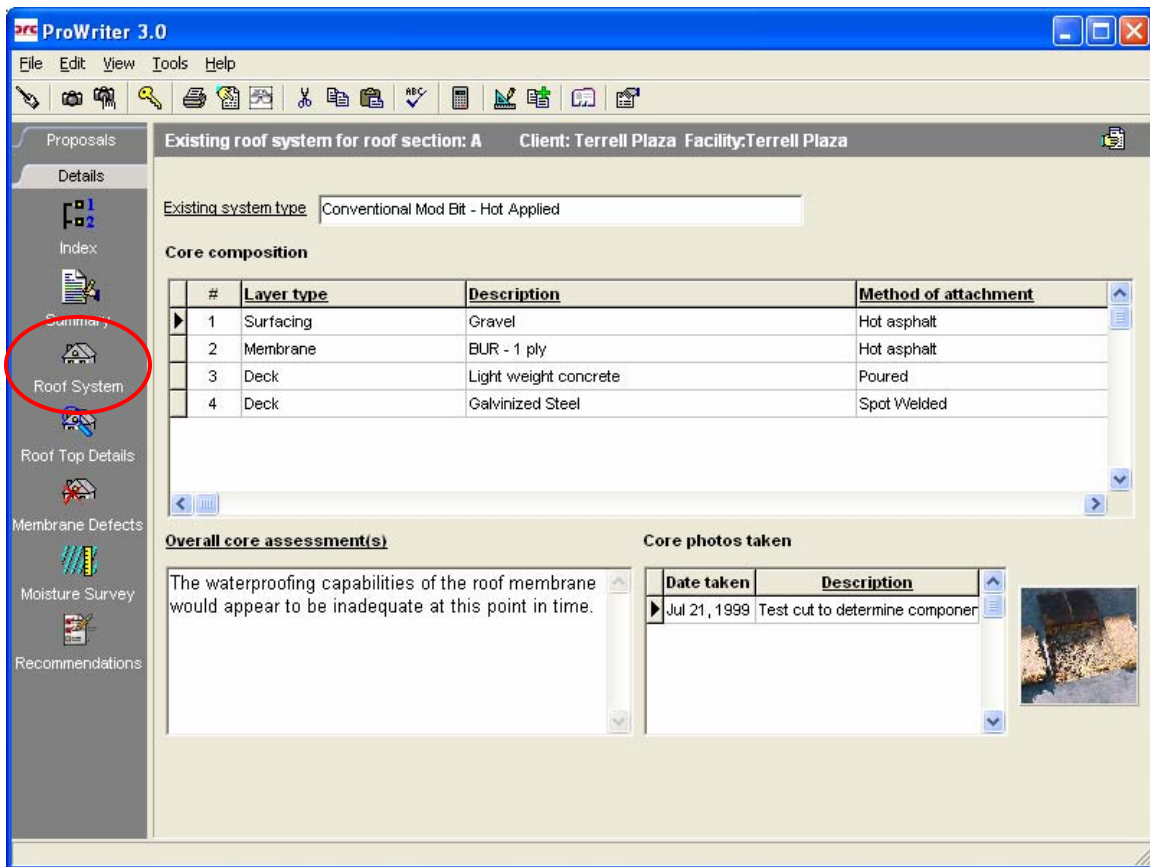
History of leaking? Yes (selected), No, Unknown

Drainage and leak details: Leak detected after heavy rains. Has also leaked in the past.

- General information about the roof section is entered on the summary page.
- This information includes roof size, age, composition and condition
- A memo field exists to allow additional information about the condition of the roof to be entered
- A photo of the roof section can be added

## ProWriter® 3.0 Screen Design

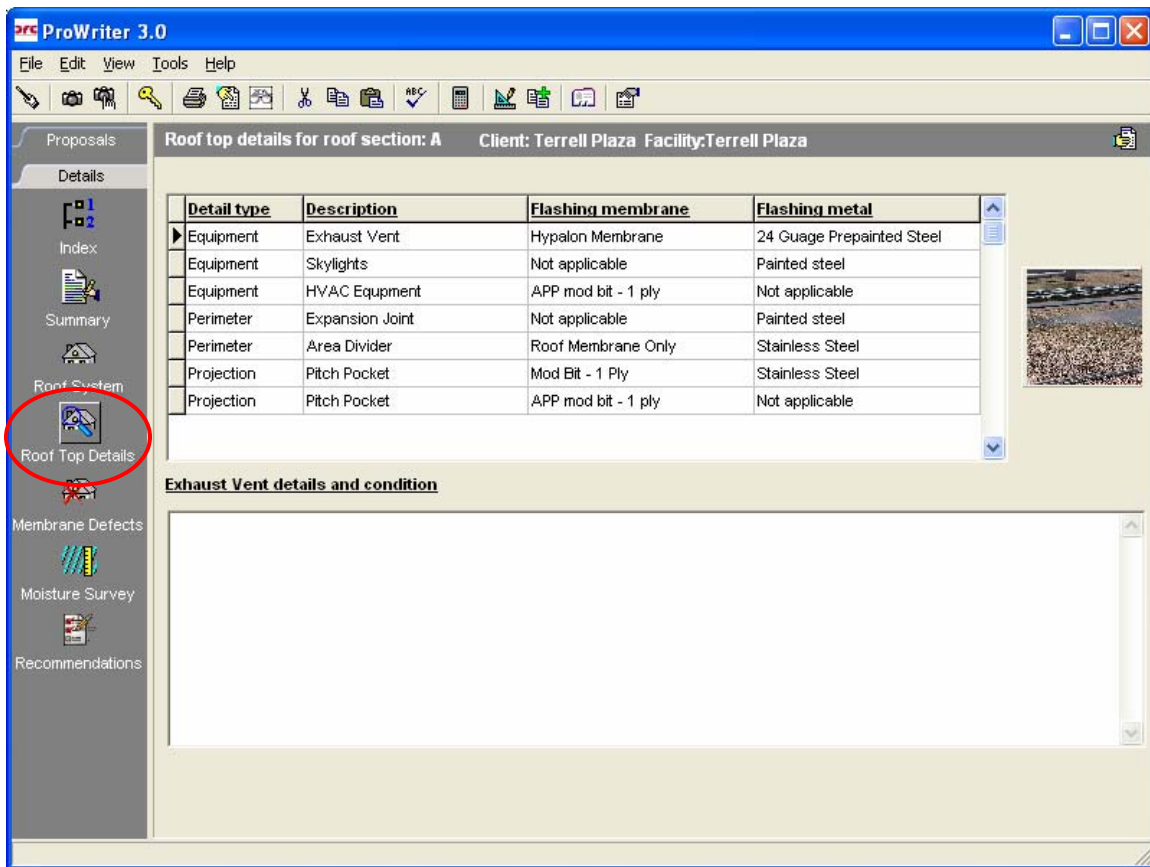
### ProWriter® 3.0 – Roof System Page



- This page is used to list the composition of the existing roof section
- SmartLists of standard layer types exist to assist in data entry
- Notes about the Inspector's overall assessment of the roof can be included

## ProWriter® 3.0 Screen Design

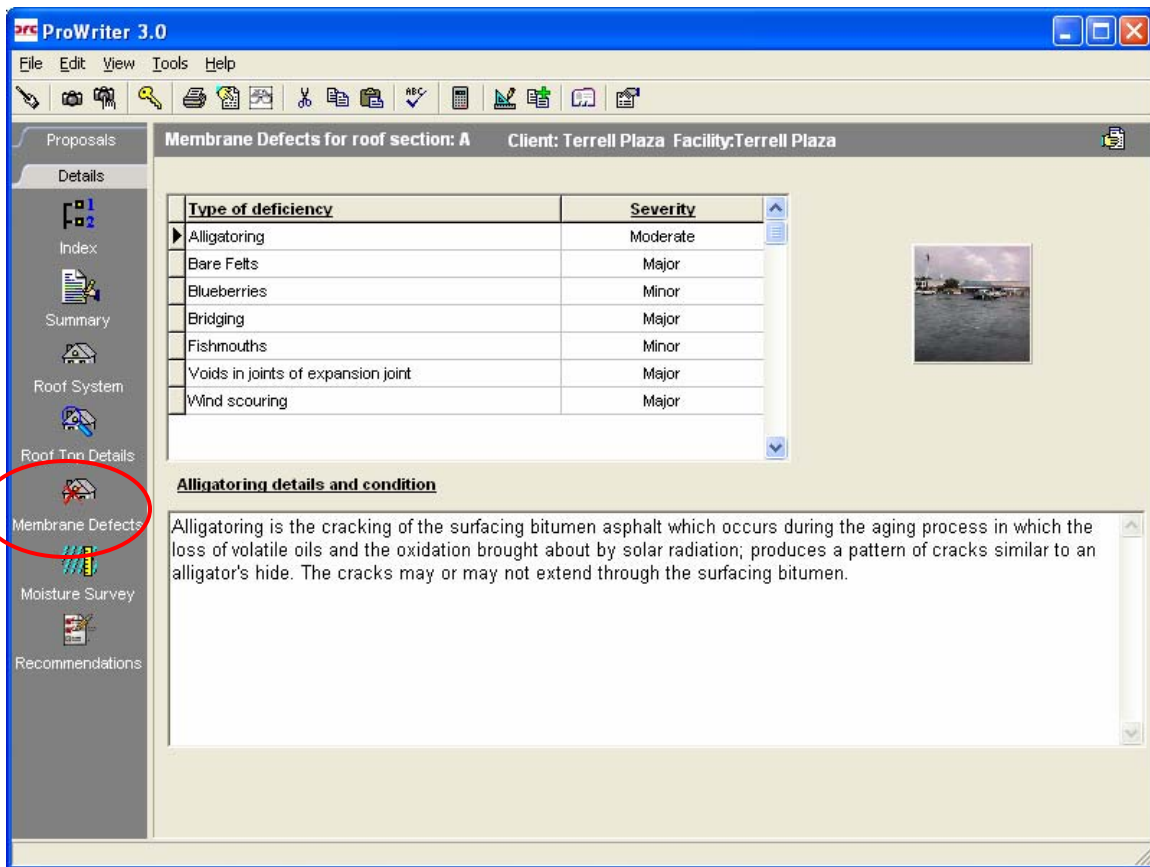
### ProWriter® 3.0 – Roof-top Details



- Roof top details can be listed on this page using the predefined SmartLists
- Additional information about the condition of each detail can be entered
- Photos of each of the details can be added to this page
- As each row is selected the condition details and photo for the selected detail display

## ProWriter® 3.0 Screen Design

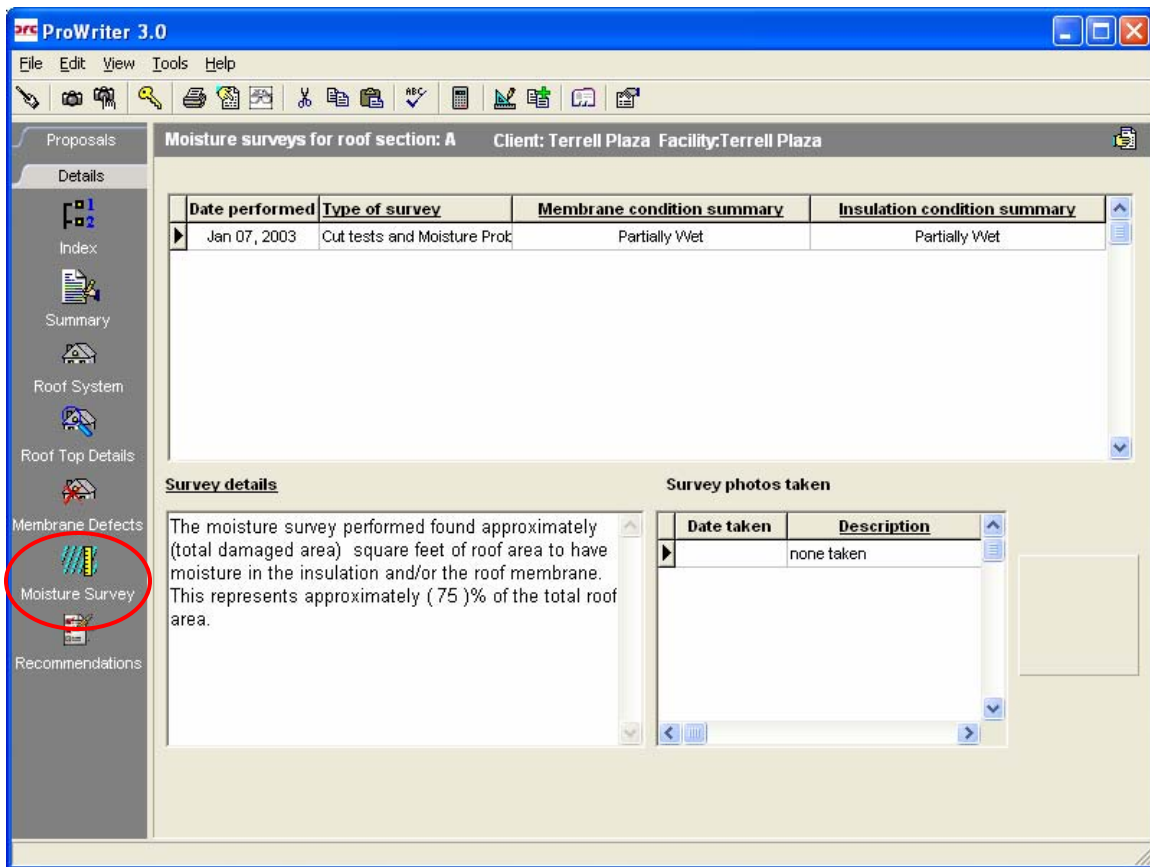
### ProWriter® 3.0 – Membrane Defects Page



- Each of the defects found during a roof inspection is listed here
- Photos of the defects can be added and included in printed proposals providing visual confirmation of your findings
- Additional information can be included for each defect
- When a defect is selected the relevant photo and information displays

## ProWriter® 3.0 Screen Design

### ProWriter® 3.0 – Moisture Survey Page



- Details of any moisture surveys that have been carried out on the roof section are entered here.
- Additional details can be entered along with thermogram or photo
- This page can be excluded from the proposal if not required.

## ProWriter® 3.0 Screen Design

### ProWriter® 3.0 – Recommendations Page

ProWriter 3.0

File Edit View Tools Help

Proposals

Expenditure recommendations for roof section: A Client: Terrell Plaza Facility: Terrell Plaza

Quote year	Type of activity	Urgency?	\$ Amount
2002	Repair	High	\$10,563.00


Details of activity

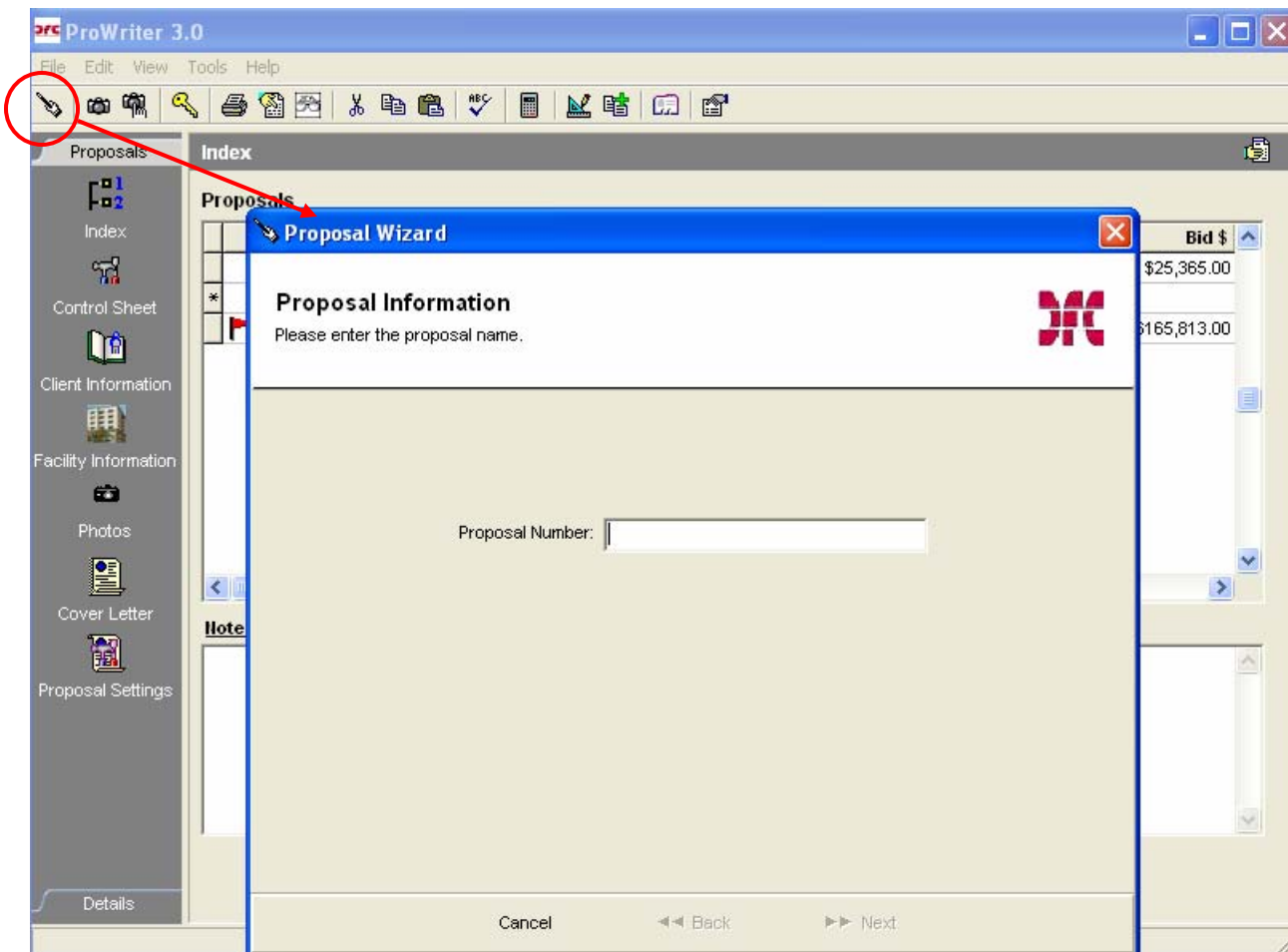
### Complete recover proposal

- Mechanically fasten 1.3" ISO insulation ( R-8.3) using five fasteners per sheet.
- Mop one layer of 1/2" ( R-1.3 ) coated tentest over the ISO insulation using Type 2 asphalt.
- Supply and install fibercant at all perimeters and roof top equipment.
- Onto the coated tentest mop in 4 plies of # 15 perforated asphalt roofing felt using type 2 asphalt at a rate of 25

- Recommendations for roof work is entered on this page
- A schedule of maintenance work can be added for budget purposes
- Comprehensive details of each recommended activity can be added


## Wizards

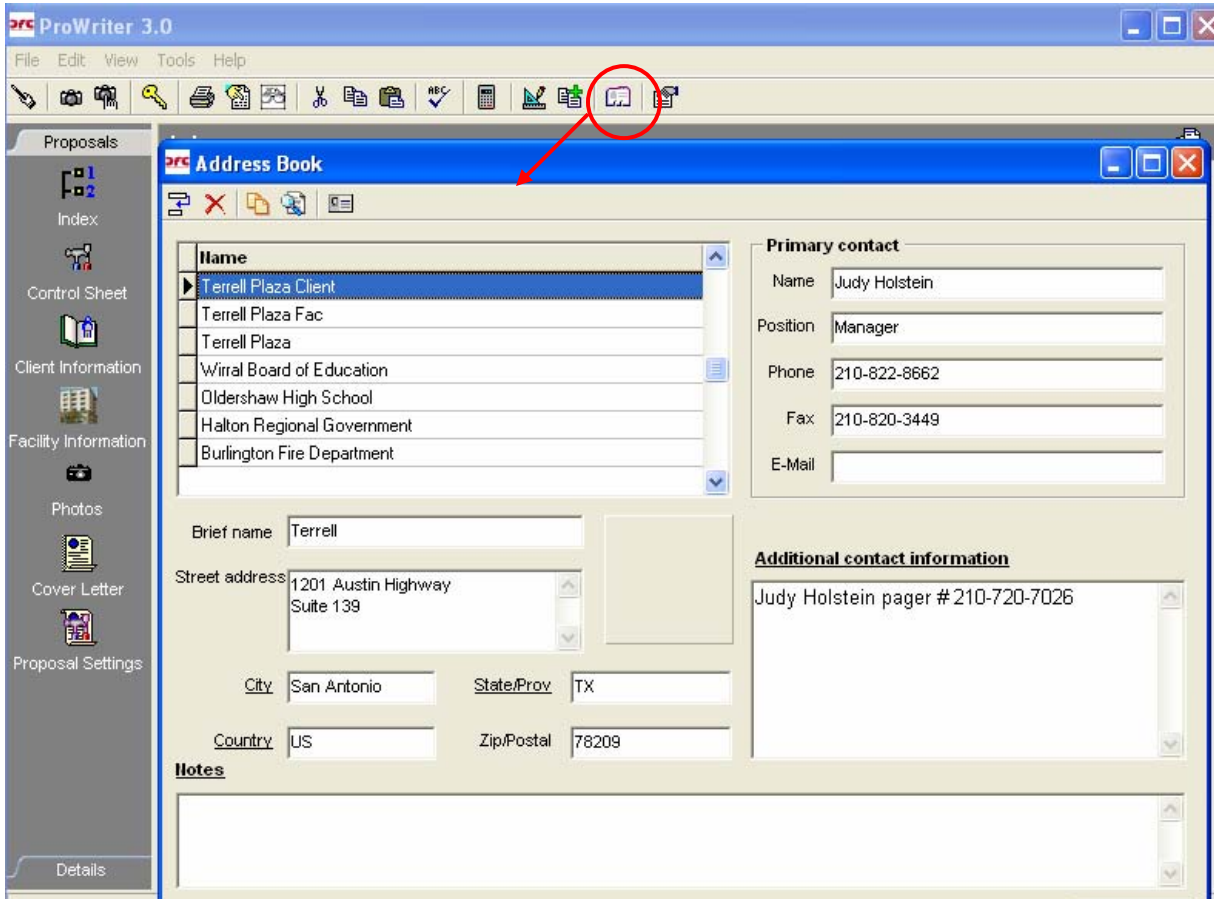
Click the wizard icon  to start the process of creating a new proposal



Proposal wizards guide you through the process of creating a new proposal.

## Address Book


Click the address icon  from the toolbar to add client/facility information to the address book

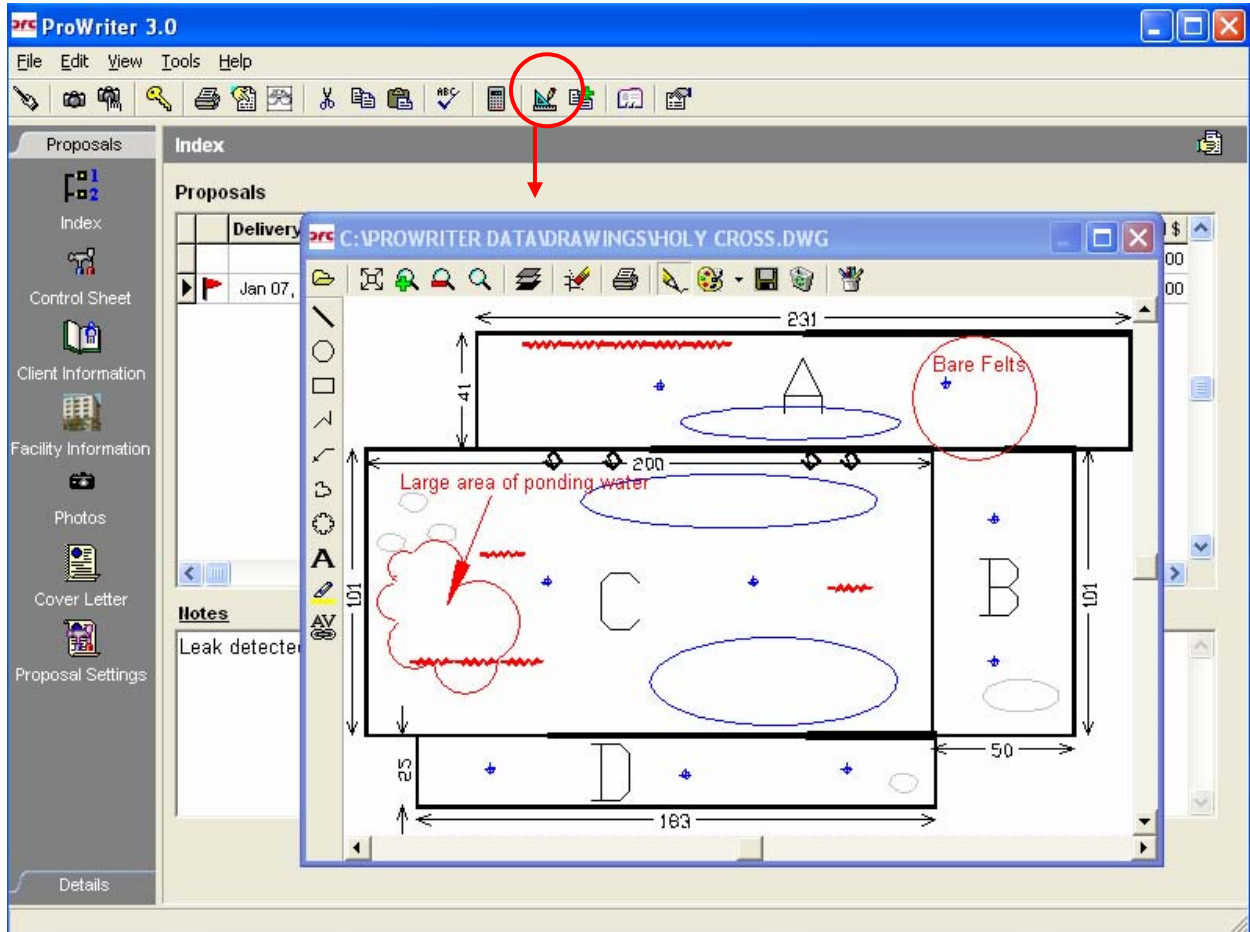


Add and save new clients to the address book. Once saved to the address book use the Client /Facility SmartLists to quickly select the client and/or facility information for new proposals. Create an Outlook contact directly from ProWriter® 3.0

## ProWriter® 3.0 Features

### CAD Drawing


Click the CAD viewer icon  on the ProWriter® 3.0 toolbar to attach CAD drawing to your proposal

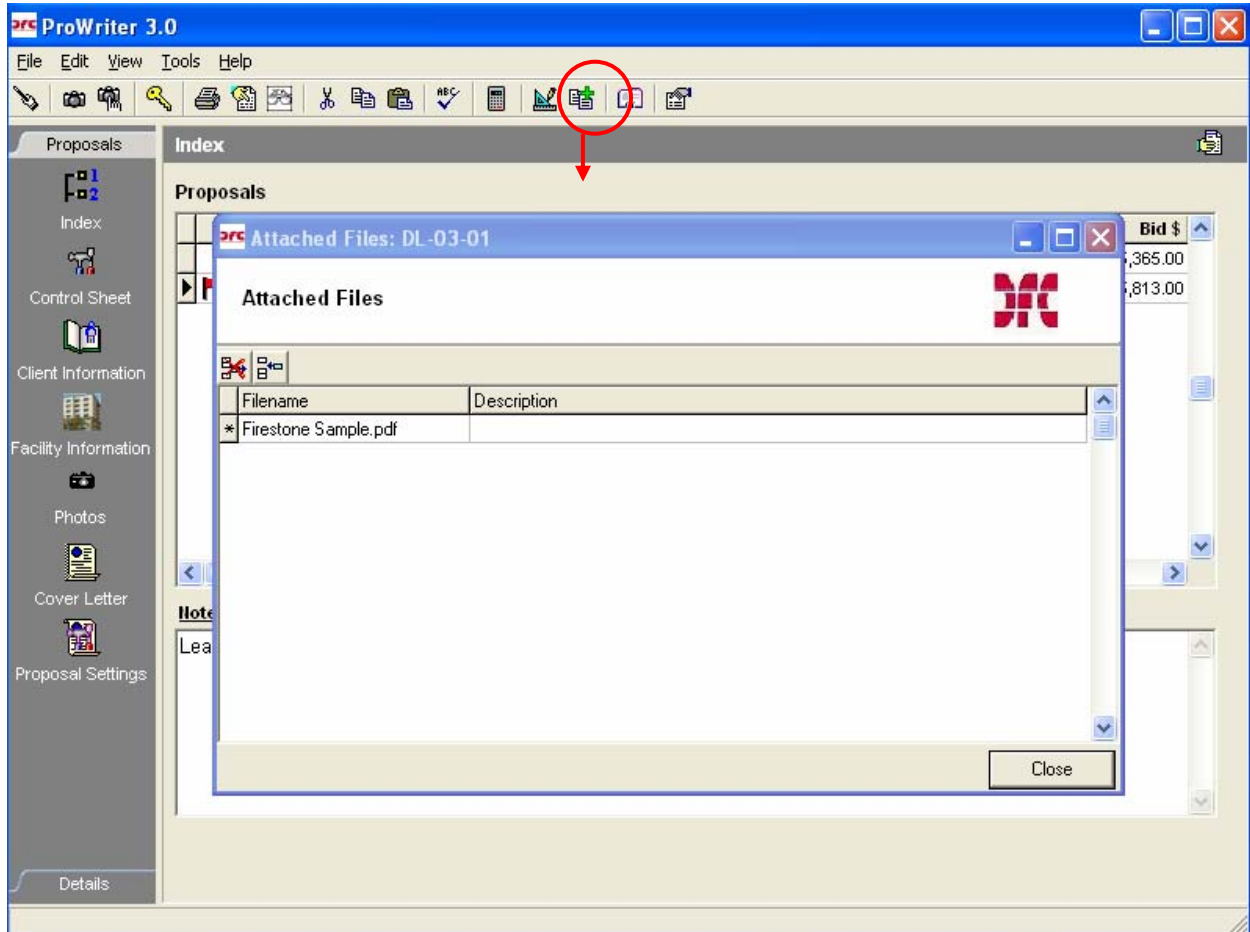


When a drawing is attached, ProWriter® 3.0 creates a copy and stores it within the application. This copy can be marked up to highlight problem areas and can be included in printed proposals.

## ProWriter® 3.0 Features

### *Attach External Files*

Click the Attach files icon  to copy and store a file within ProWriter® 3.0

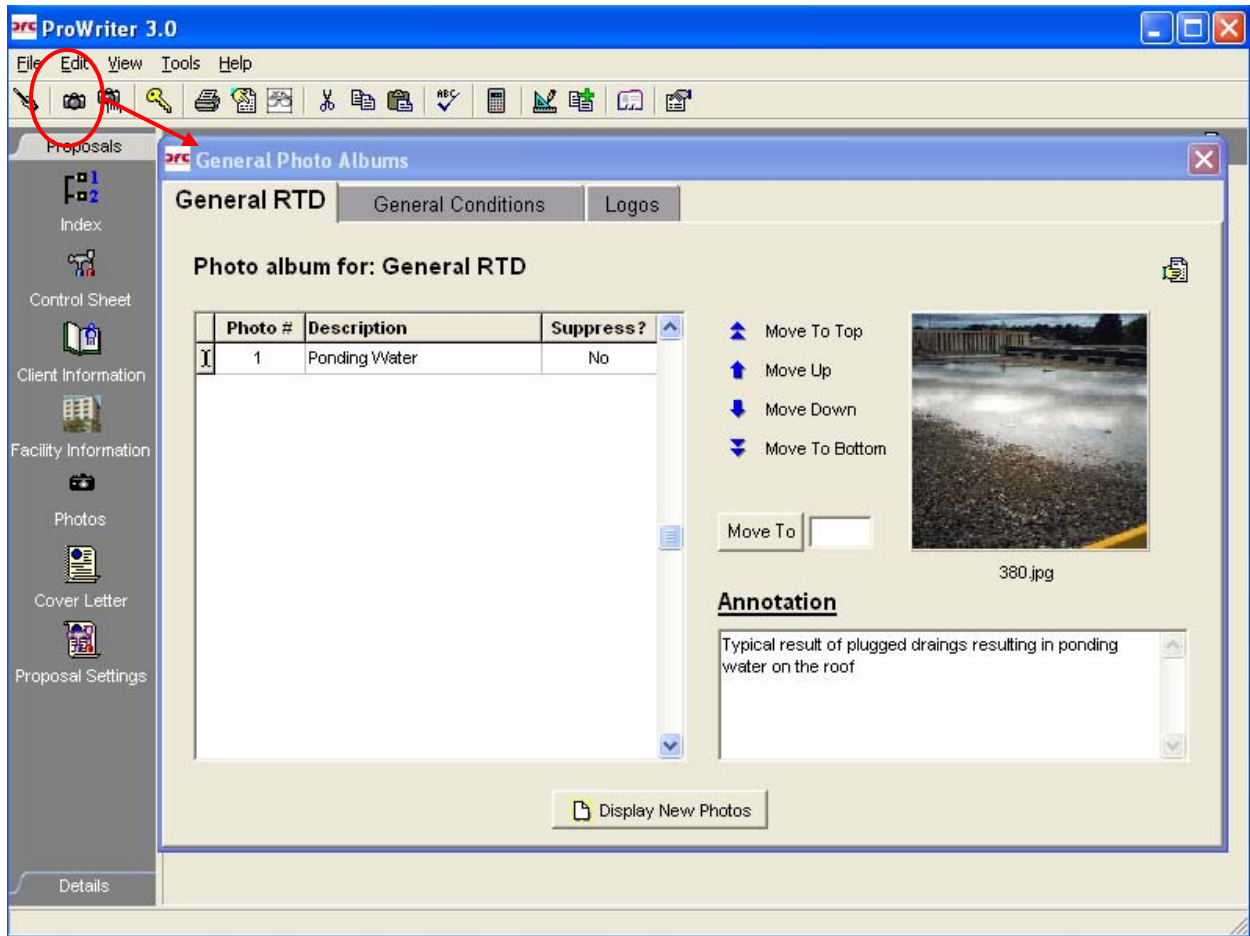


Double click on the file name to start the application and view and print the file

Files such as warranties, specifications etc. can be attached and stored within ProWriter® 3.0 keeping all of your information in one place.

## General Photo Albums

Click on the General Photo Album icon to view and attach photos to the 3 general albums



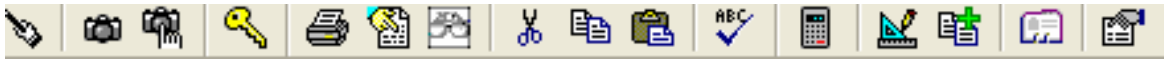
The shared albums have been divided into 3 types

- General roof top details
- General conditions
- Logos.

Store photos of typical defects and conditions for use with any proposal. Includes the photo handling capabilities available on the photos page of a proposal

### *Expanded Toolbar*

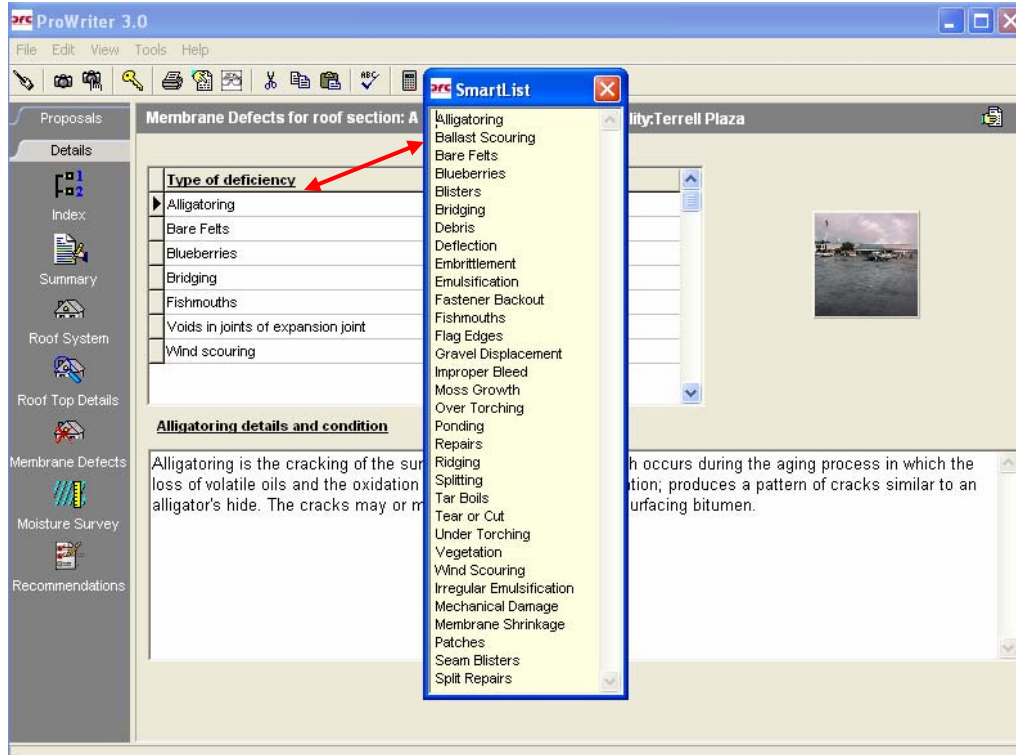
The ProWriter® 3.0 toolbar provides quick access to many features and functions. Tool tips appear when you point to an icon providing a simple way of locating the tool or option you need.



1. Wizard – guides you through the proposal process
2. General Photo Albums – the shared photo albums to be used with any proposal
3. Photo Assistant – used to distribute photos onto the pages of ProWriter® 3.0
4. KeyPlan – used to navigate through the different roof sections as well as a visual location of each roof section
5. Print a proposal – prints the currently selected proposal
6. Report Library – Displays the predefined reports
7. Inspection Form – Edit and print the inspection form for roof inspections
8. Cut, Copy, Paste – from one field to another
9. Spell check – use this icon to check the spelling of memo fields and edit boxes
10. Recalculate – occasionally the totals are incorrect due to an unforeseen problem; this tool corrects any incorrect totals
11. CAD Viewer – attach and view CAD drawings
12. Attach Files – attach and view other files, keeping all of the information in one place
13. Address Book – Enter client and facility names and addresses for use in future proposals
14. Preferences – customize the application to meet your business needs

## SmartLists

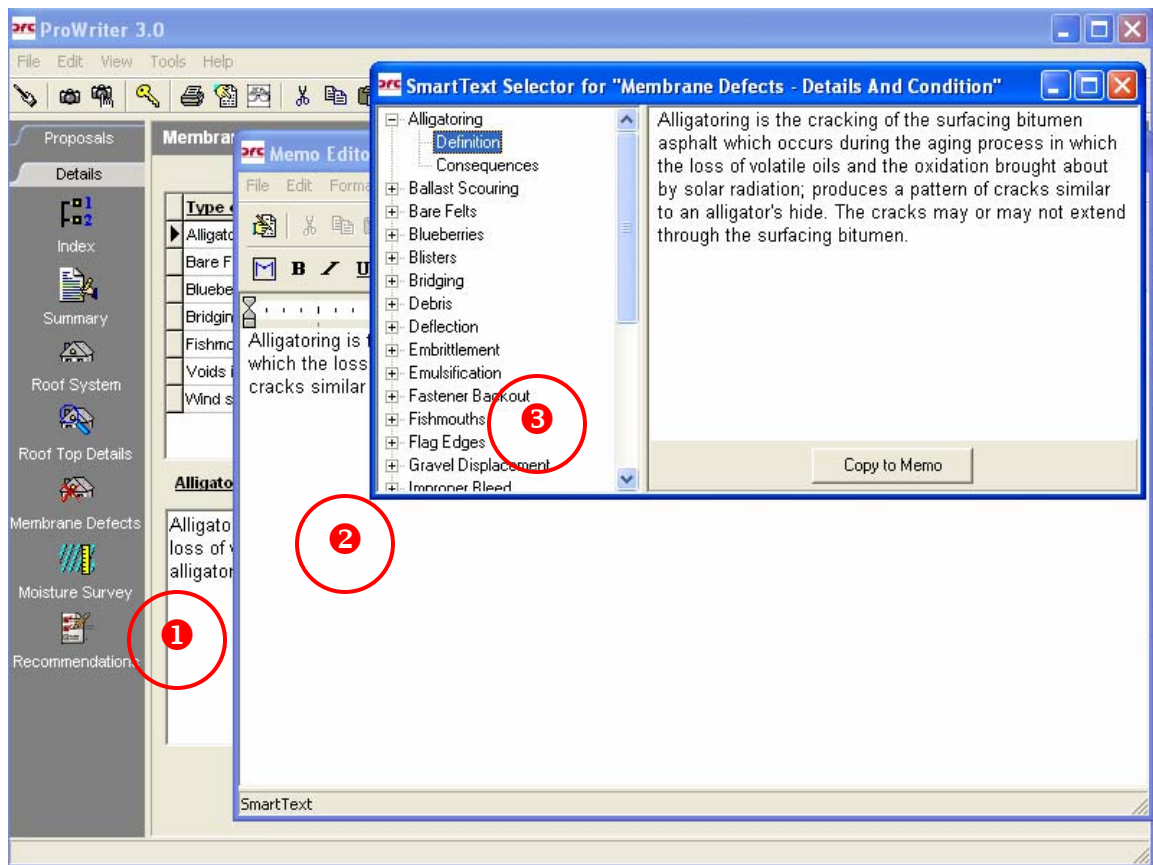
SmartLists are predefined lists of standard entries that are included with the application to assist in speeding up data entry. Any column or row headings that are underlined indicate a hyperlink to a SmartList from which an entry can be selected. These lists are easy to modify and customize for use.



- Using SmartLists makes the data entry process simpler and faster
- It's as easy as 1-2-3
  1. Double click on the row or column heading
  2. Click on the entry in the SmartList you wish to use
  3. Double Click to bring the entry into the cell
- SmartLists can be easily edited and customized to meet your needs

### SmartText

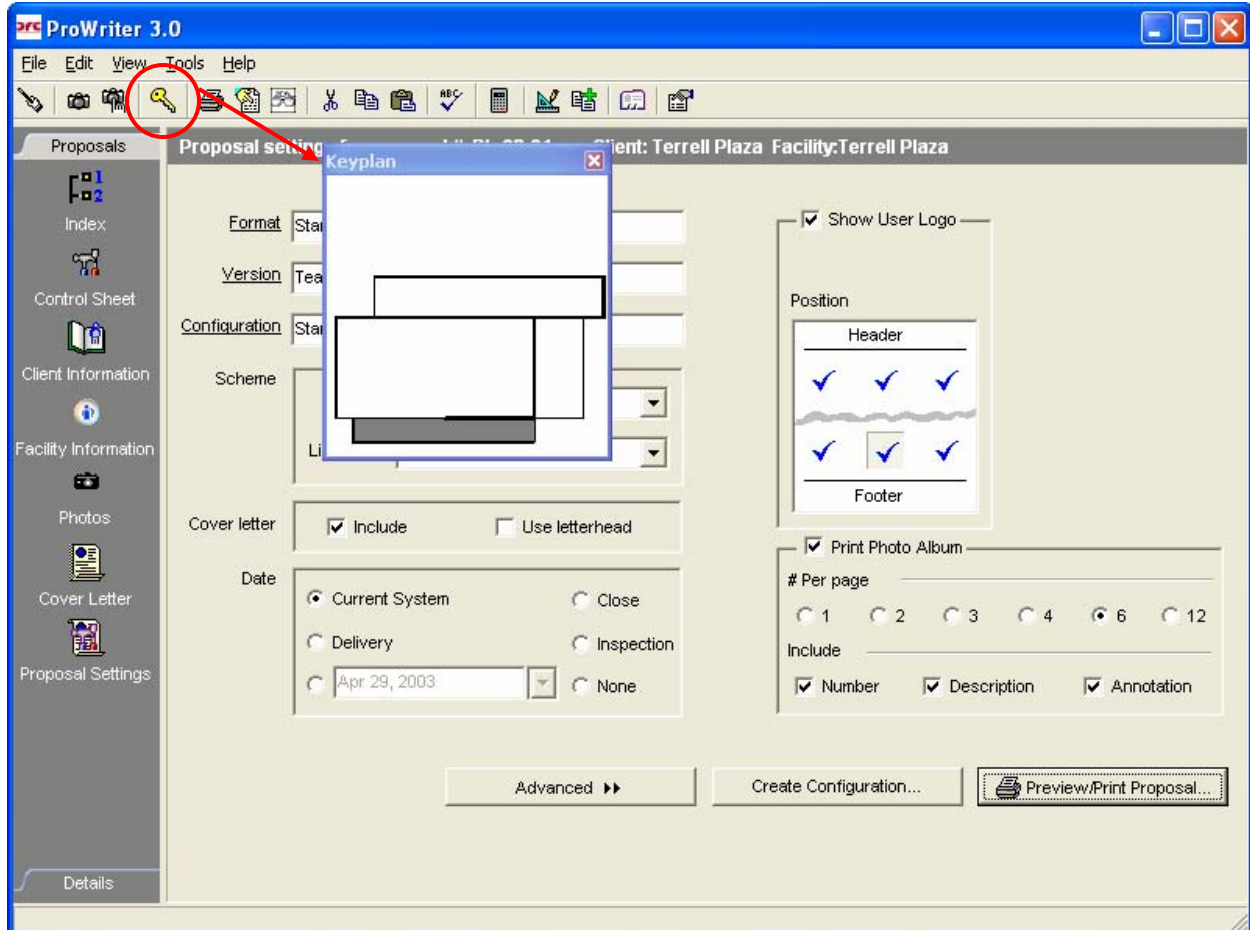
Like SmartLists, SmartText has been created to simplify and speed up the data entry process. Whereas SmartLists are lists of predefined entries, SmartText is predefined text for use in memo fields. SmartText is easy to create and can be copied from word documents and stored as SmartText within ProWriter® 3.0



- Adding SmartText to any memo field is simple.
  1. Double click inside a memo field to open the Memo editor
  2. Click on the SmartText icon on the toolbar
  3. Select the SmartText you want to use and copy it to the memo field
- SmartText can be edited quickly and easily to suit your business needs

## KeyPlans

Click on the KeyPlan icon to open the KeyPlan



- A KeyPlan is an outline of the building showing the individual roof sections.
- Once the roof sections have been designated on the KeyPlan the selected roof section is shaded giving an indication of its location on the facility
- As you click on each section of the KeyPlan the information for that roof section is displayed
- KeyPlans are included in facility reports giving your customers a visual point of reference.

Printed Proposals

Once the information for the facility has been entered it's time to print the proposal. Proposals generated using ProWriter® 3.0 are colorful, comprehensive and professional.

Some sample pages are shown below