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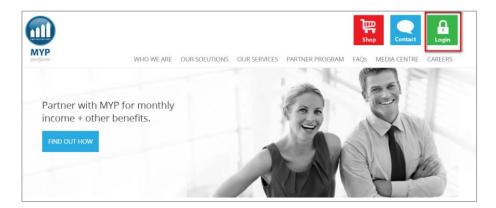


The Client Proposal module provides an efficient way to generate individual scenarios and client proposals based upon the accurate program unit costs calculated by the Unit Costing module.

1. create a client proposal

Create a new client scenario and proposal by completing the following:

- Log in to MYP at <u>www.mypcorp.com</u>
- Select 'Login' and then insert your assigned user name and password





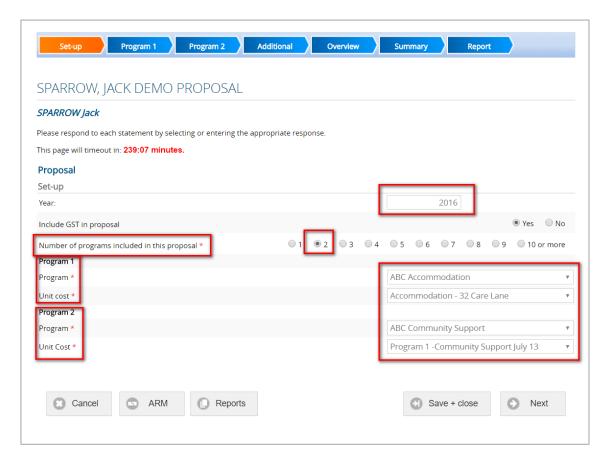
1.1. IDENTIFY THE CLIENT

- Select 'Create proposal'
- Search for, and select, the relevant client
- If there is no client select the 'No client' icon
- Create a name for the proposal and select 'Next'

1.2. IDENTIFY PROGRAMS + UNIT COSTS

- Enter the year
- Select the number of programs that the client will require, this will open up the corresponding number of windows for program and unit cost selection
- Select the relevant programs and unit costs from the drop-down menus
- Select 'Next'





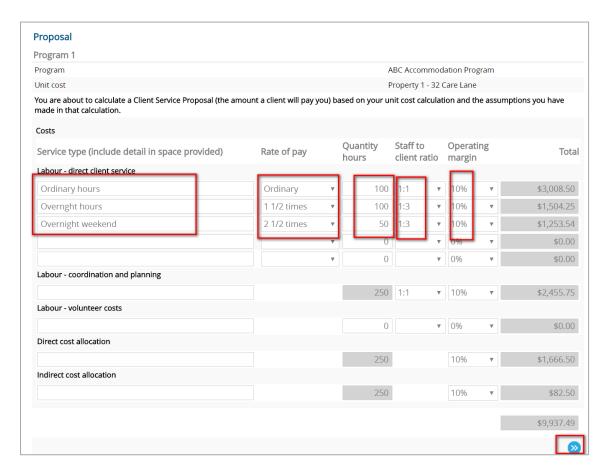
The following pages in the module provide the organisation with significant proposal flexibility. The program unit costs are those previously calculated using the Unit Costing module (refer the Unit Costing myHelp) and are based on a standard hour of time. The client proposal provides module the ability to adjust the proposal/scenario in a number ways as outlined below.

1.3. CALCULATE CLIENT SPECIFIC REQUIREMENTS BY PROGRAM

1.3.1 Direct labour

- For each program, enter a description re direct labour for each item
- Select the rate of pay for each item
- Enter the number of hours for each item
- Select the staff to client ratio for each item
- If relevant, select an operating margin for each item
- Select 'Calculate'





1.3.2 Program coordinators + volunteers

- Enter a description re coordinator's labour (and volunteers if required)
- Select the staff to client ratio for each item
- If relevant, select an operating margin for each item

NB: The number of Coordinator hours is automatically totalled based on the direct labour totals above with the amounts calculated from the Unit Costing module.

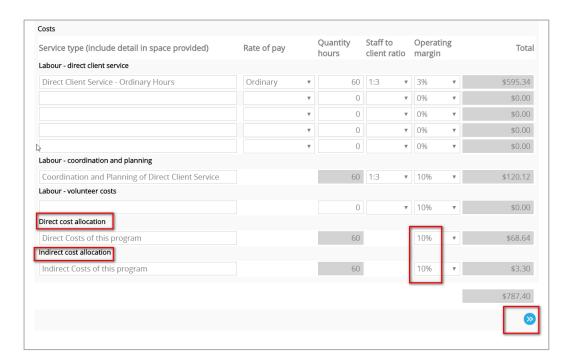


1.3.3 Direct + indirect costs

- If required, enter a description re direct and indirect costs
- If relevant, select an operating margin for each item
- Select 'Calculate' to display the total amounts for this program in the proposal.

NB: The number of Direct and Indirect hours are automatically totalled based on the direct labour totals above with the amounts calculated from the Unit Costing module.



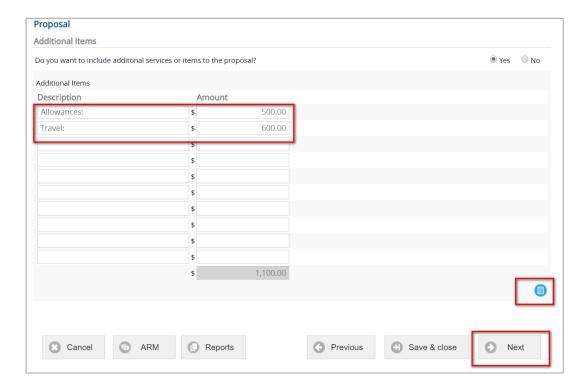


• Select 'Next' to move to the next program and repeat the above as many times as required.

1.4. ADDITIONAL ITEMS

After all programs have been entered, additional items can be added if required.

- Enter descriptions and amounts
- Select 'Calculate' and 'Next'



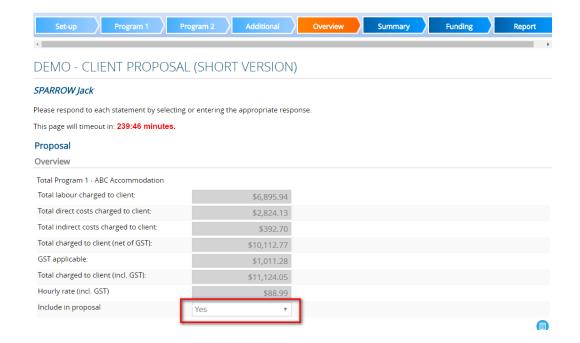


1.5. REVIEW PROPOSAL OVERVIEW

• Review program sub-totals and select 'Yes' to include relevant programs in the proposal

NB: If the overall total of the proposal is greater than the amount the client has been assessed for, selecting 'No' for any of the programs will exclude them from the proposal and therefore reduce the proposal amount. Alternatively, each individual program could be selected and the amount of hours reduced to lower the proposal amount (refer section 1.3 above).

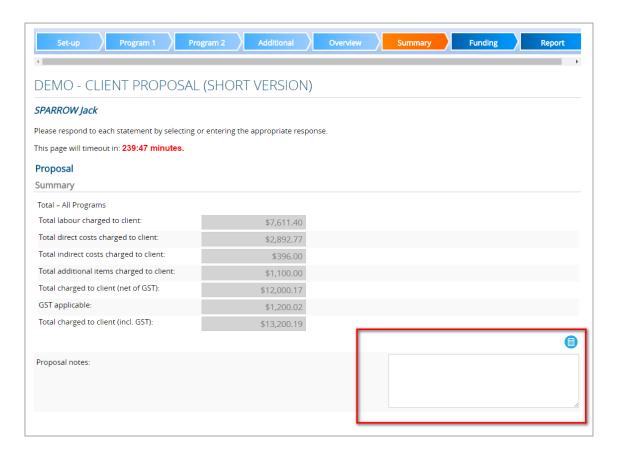
Select 'Next'



1.6. REVIEW SUMMARY

- Review summary
- Enter any additional notes to be included in the reports
- Select 'Next'

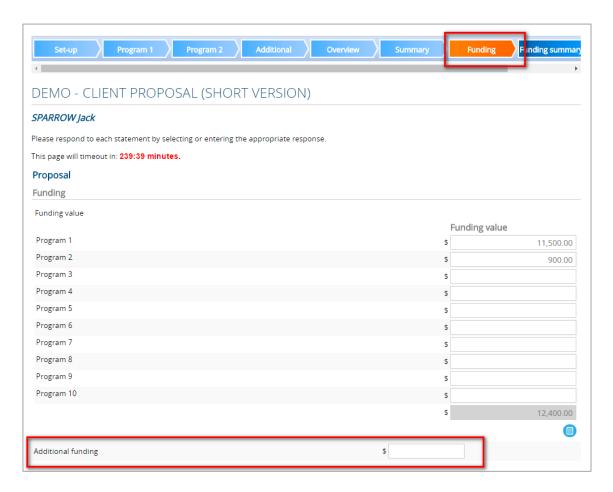




1.7. REVIEW FUNDING

- Review funding
- Additional funding fields allows the user to track funding that is non-program specific
- Select 'Calculate'
- Select 'Next'

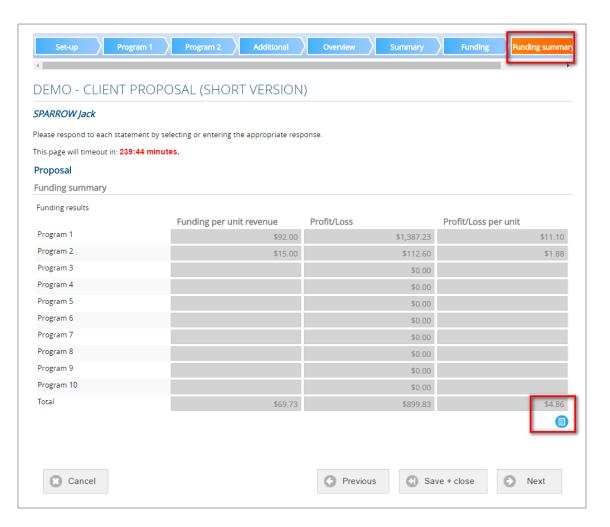




1.8. FUNDING SUMMARY

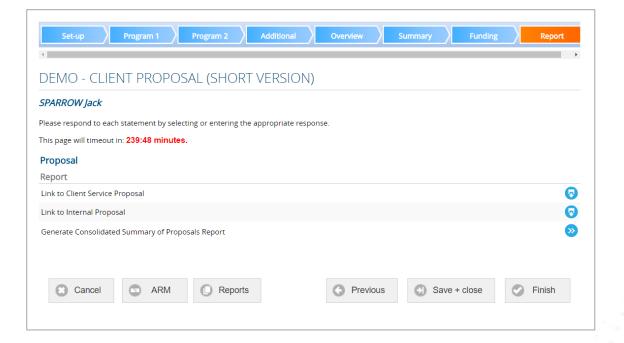
- Review funding summary
- If additional funding fields have been added, select 'Calculate'
- Select 'Next'





1.9. GENERATE REPORTS

Select report





- From this screen, the following reports can be generated:
 - o Client Service Proposal
 - o Internal Proposal
 - o Consolidated Summary of Proposals

NB: This is a consolidated summary of all proposals that can be filtered by program or year.

Select 'Finish'

2. MYP training + support centre

For training and support options, please refer to MYP Administration, Relationships + Management (ARM) myHelp.

