Estimating: how-to guide

IntraSync
November 21, 2026

Estimating is where a precast plant prices its work, quotes it to the customer and hands what it wins to production. Estimators build and price estimates, issue quote revisions and record each customer's decision; a won estimate becomes a sales order that is released to the plant.

> *Written for: Estimator, Estimating manager, Sales manager, Estimating administrator.*

> *In the pictures, a numbered red box marks where to click or type. Where a picture has more than one box, the numbers give the order.*

In this guide

- 1. Find your way around the Estimating hub
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- 12. Fill in the quotation contract details
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- 23. Read the pipeline
- 24. Set up rate masters
- 25. Keep the structure price book
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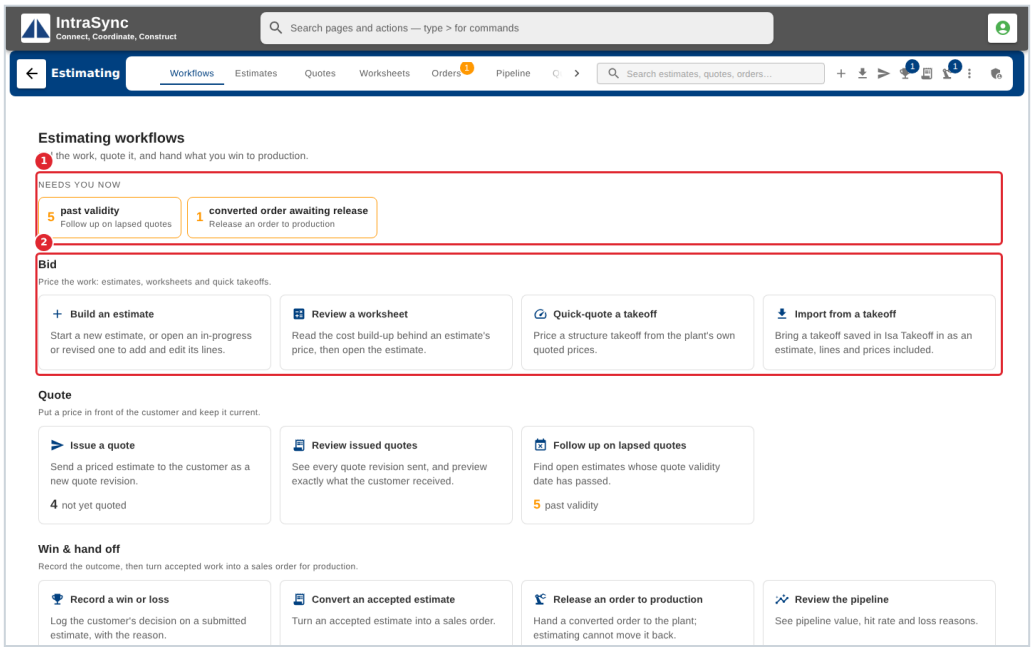
– 27. Set up agency specifications
– 28. Change the estimating settings
– 29. Check the quote sources and the sales-order connection

1. Find your way around the Estimating hub

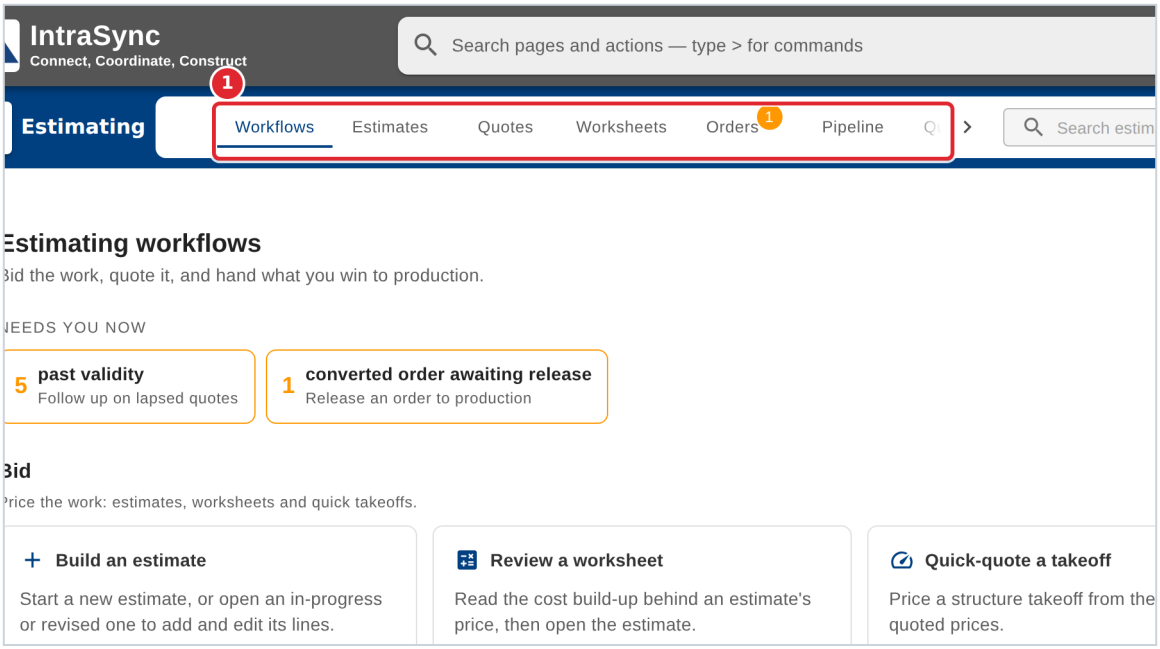
Know where each part of the estimating work lives before you start, and see at a glance what is waiting on you.

Before you start:

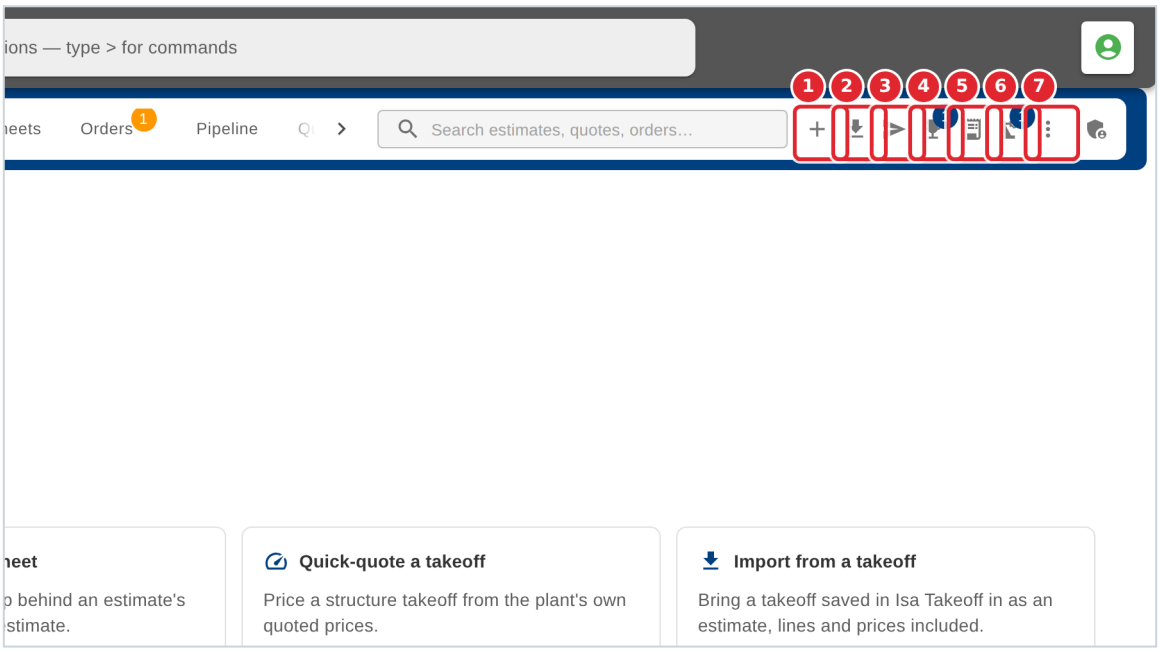
– You need access to Estimating.



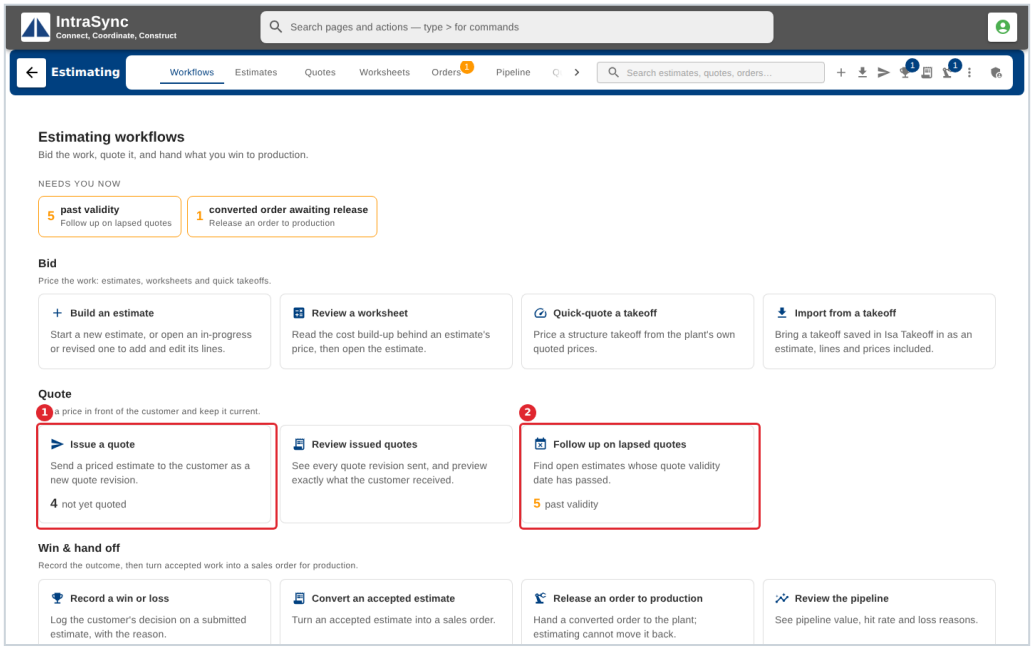
Step 1. Open Estimating. The hub opens on the Workflows tab, which sets out the department's work in three stages: Bid, Quote, and Win & hand off. Anything waiting on you is listed first, under Needs you now.



Step 2. Use the tabs to move between Workflows, Estimates, Quotes, Worksheets, Orders, Pipeline, Quick Quote and Drawings. When the strip is too narrow for every tab, the arrow at its end reaches the rest. The number on the Orders tab counts converted orders still waiting for release.



Step 3. The buttons beside the search box start the main tasks: New estimate (1), Import from a takeoff (2), Issue quote (3), Record win / loss (4), Convert to sales order (5) and Release to production (6). More (7) holds Refresh. A number on a button counts the estimates waiting for that step.



Step 4. Each card on the Workflows tab starts one task. Select a card to go straight to that work; the figure at its foot counts the estimates waiting on it.

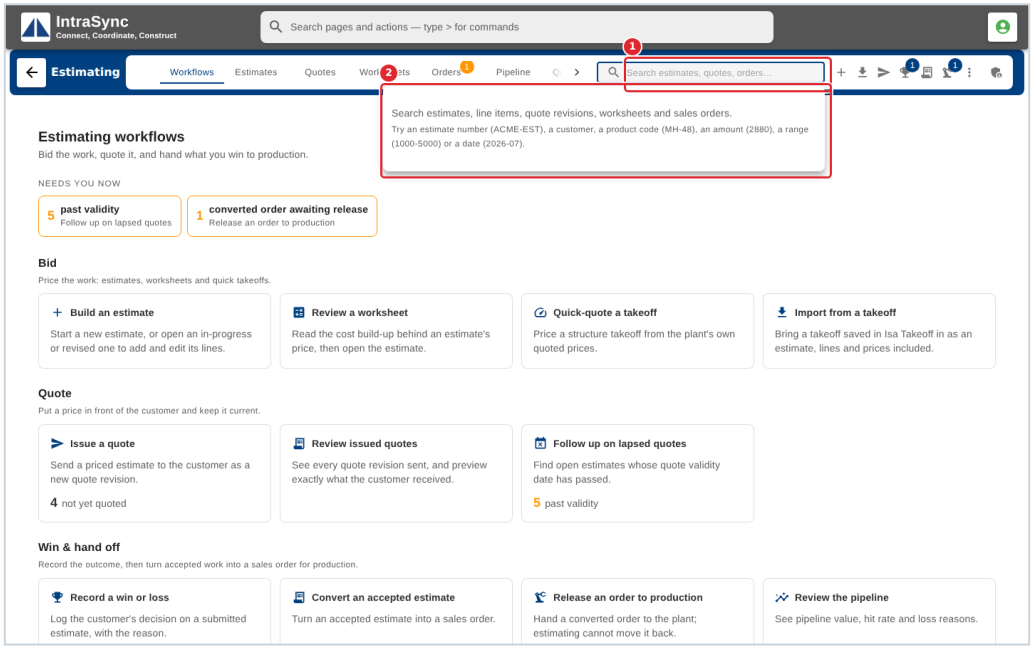
Tips:

– The hub always opens on the Workflows tab. Select More > Refresh to reload everything the hub shows.

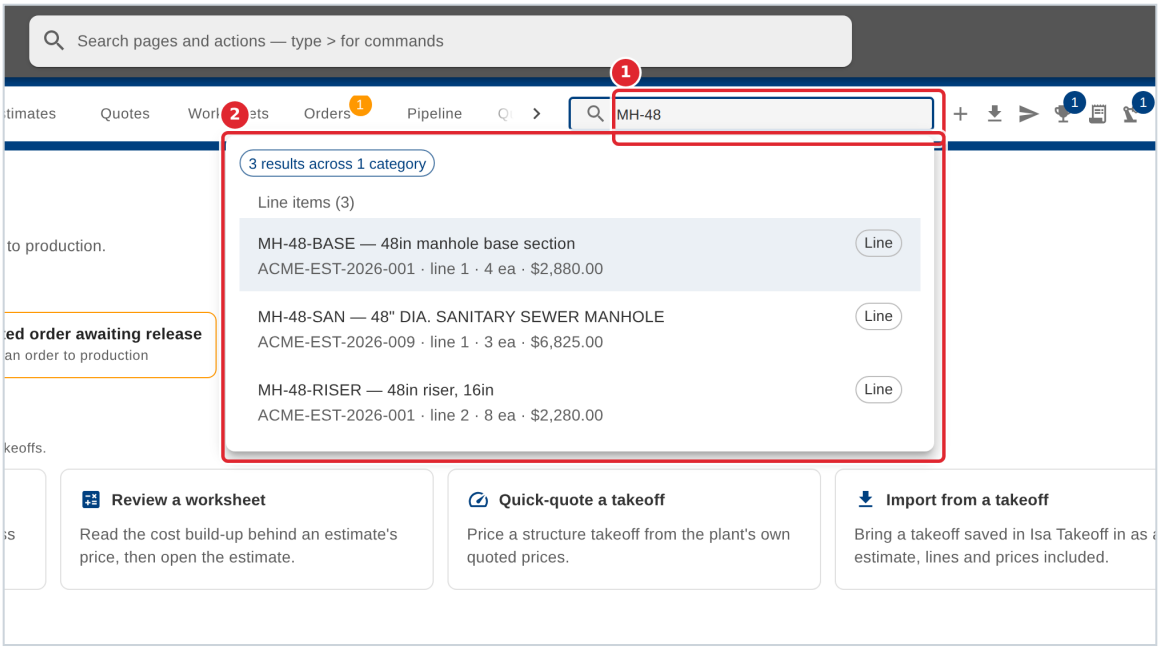
This is shown in the Estimating video at 0:03.

2. Search across estimates, quotes and orders

Jump straight to an estimate, a line, a quote revision, a worksheet or a sales order without paging through lists.



Step 1. Select the search box in the hub header. Its help lists what you can search for.



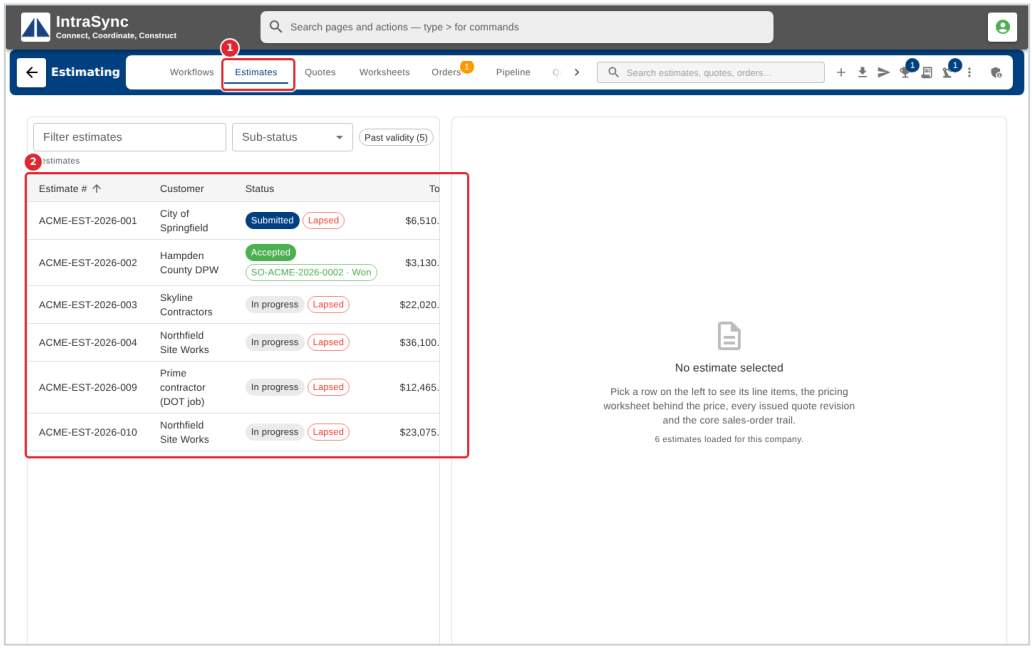
Step 2. Type a product code, an estimate number, a customer, an amount, a range of amounts or a date. Results are grouped by kind: estimates, line items, quote revisions, worksheets and sales orders.

Tips:

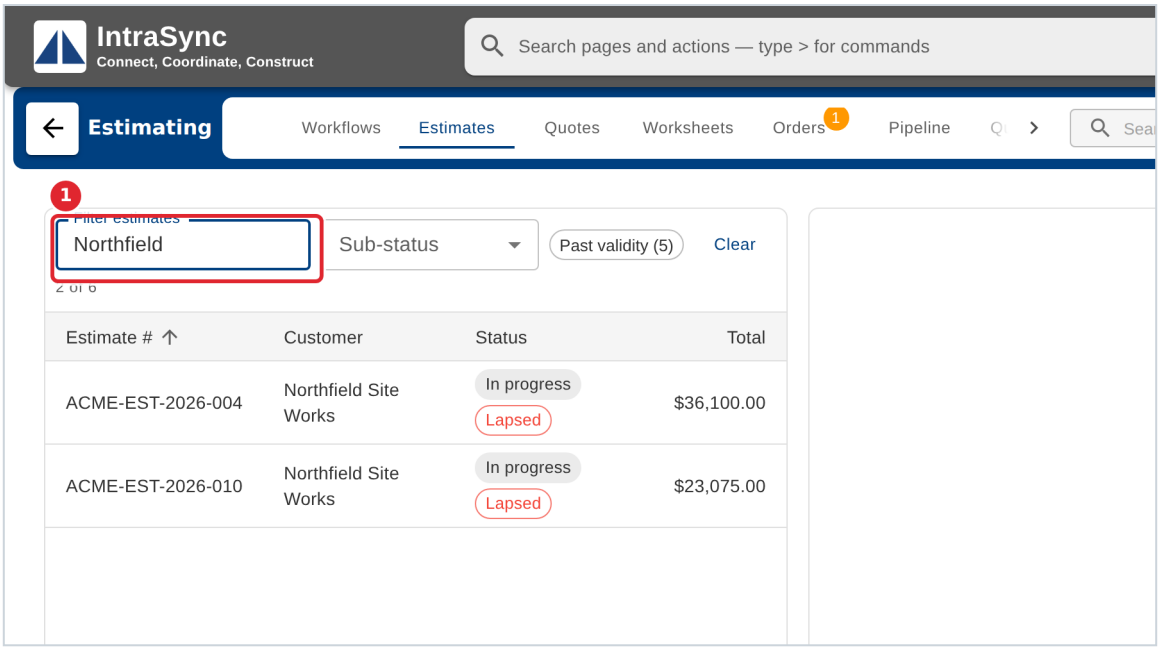
- Search looks only through what the hub has already loaded for your company.
- A plain number is matched as an amount; a range is two amounts with a dash between them; a date is a year and month, or a full date.
- Use the arrow keys to move through the results, Enter to open one and Escape to close the search.
- Selecting an estimate or a line opens the estimate; a quote revision opens the Quotes tab; a worksheet opens the Worksheets tab; a sales order opens the Orders tab.

3. Find an estimate in the list

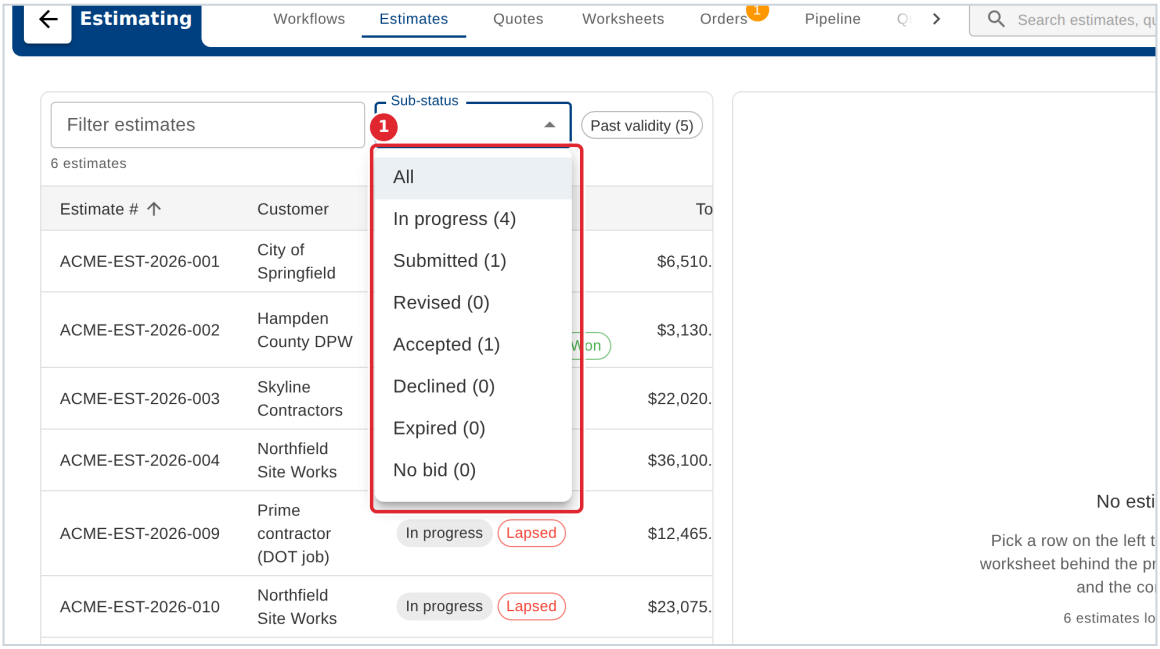
Narrow the estimate list to the work you are looking for.



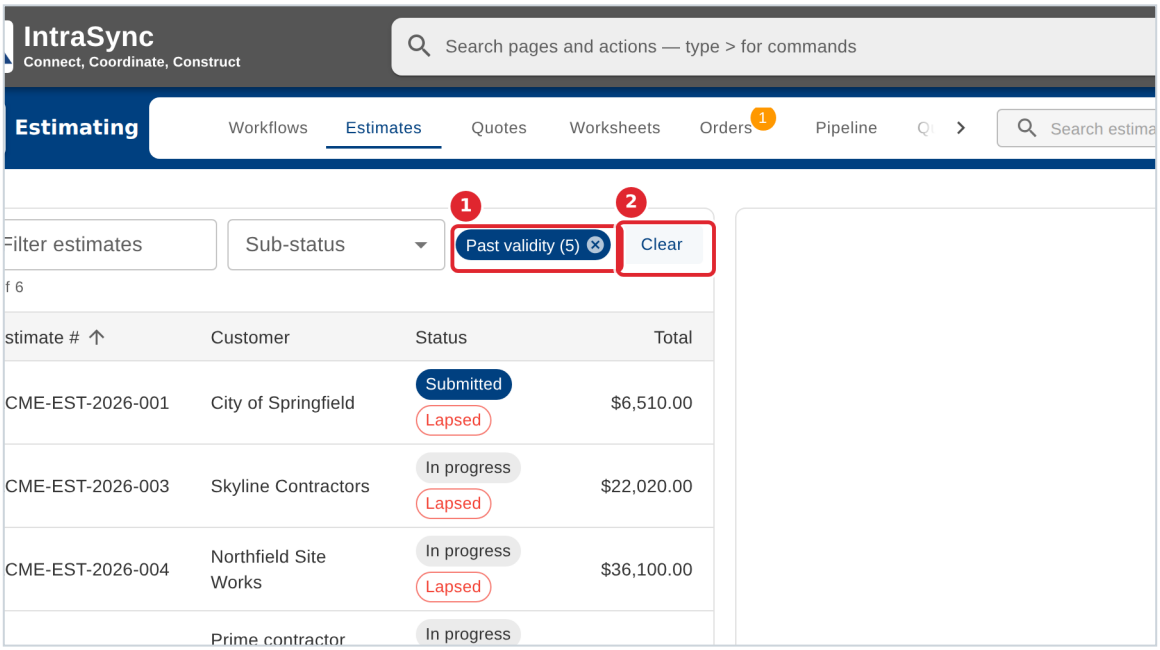
Step 1. Select the Estimates tab. The list shows every estimate with its customer, status and total, and the pane on the right shows the estimate you select.



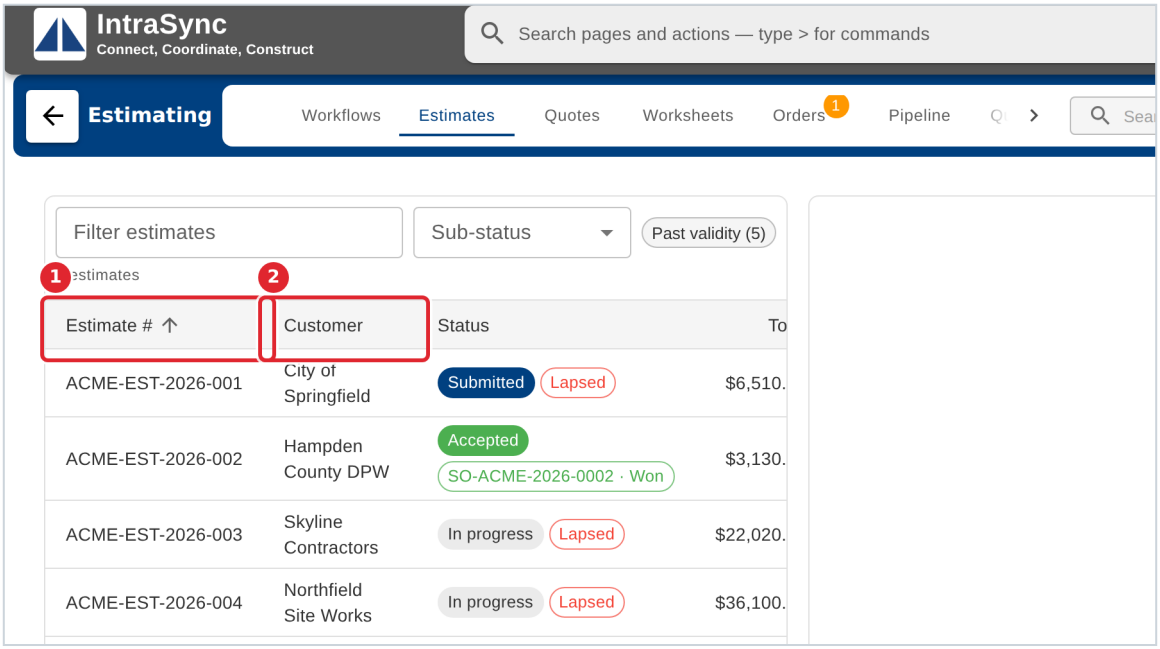
Step 2. Type in Filter estimates to narrow the list by estimate number, customer, job or source reference. The count under the box says how many estimates match.



Step 3. Open Sub-status to show only the estimates at one status. Each choice shows how many estimates are at it.



Step 4. Select Past validity to show only the open estimates whose quote validity date has passed. Select Clear to see every estimate again.



Step 5. Select a column heading to sort the list by it. Select it again to reverse the order.

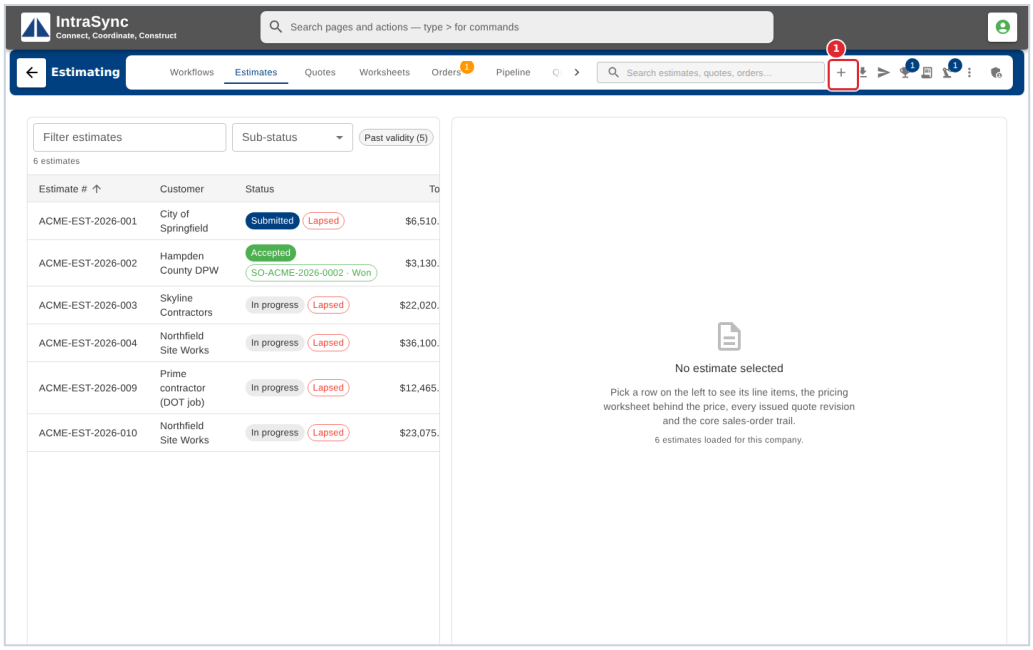
Tips:

- Each row shows the estimate's status, and, where they apply, its sales order, a Partly ordered note and how long its quote is still valid.
- When the list says no estimate matches the filter, select Clear.

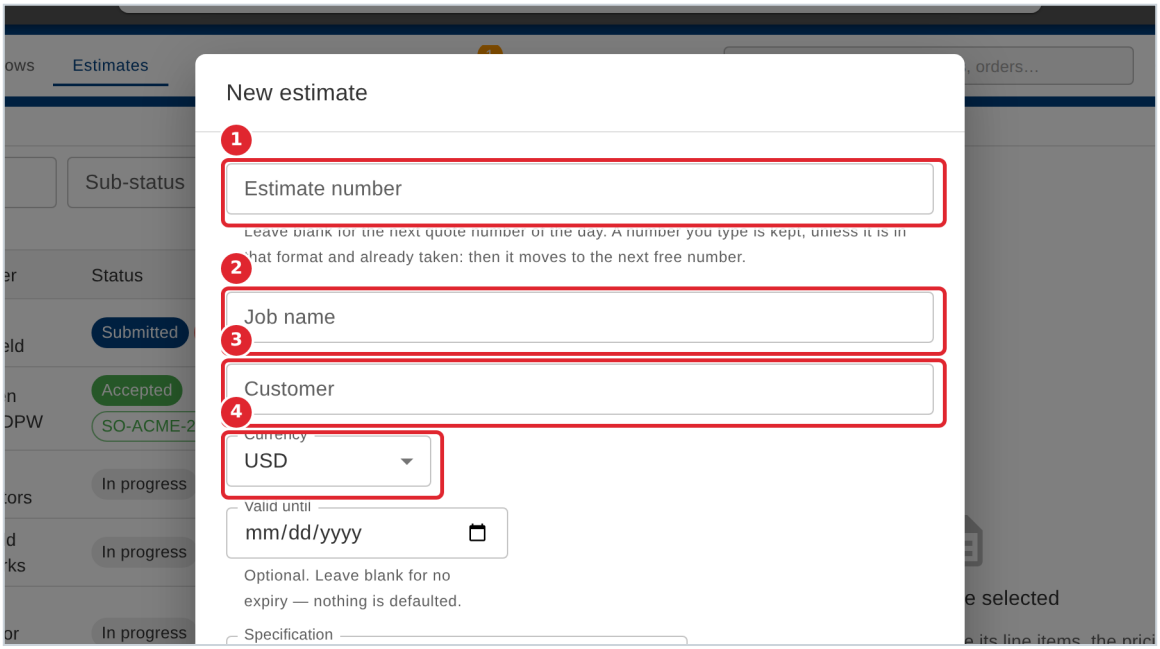
This is shown in the Estimating video at 0:08.

4. Create a new estimate

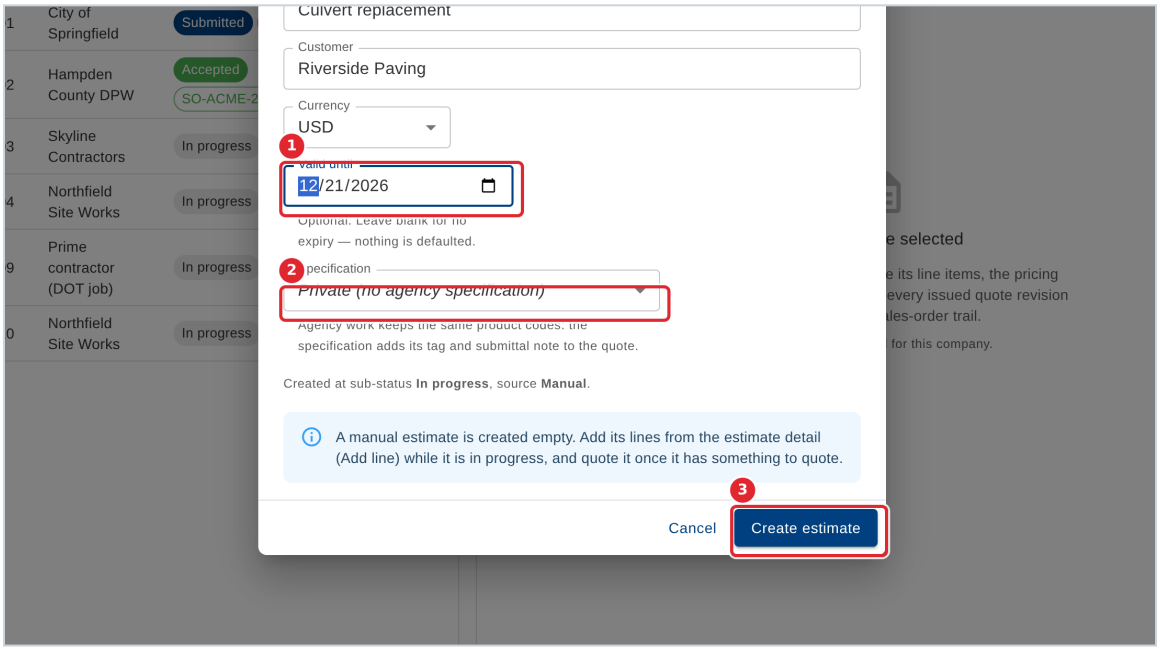
Start an estimate by hand for work that did not come from a takeoff or a drawing.



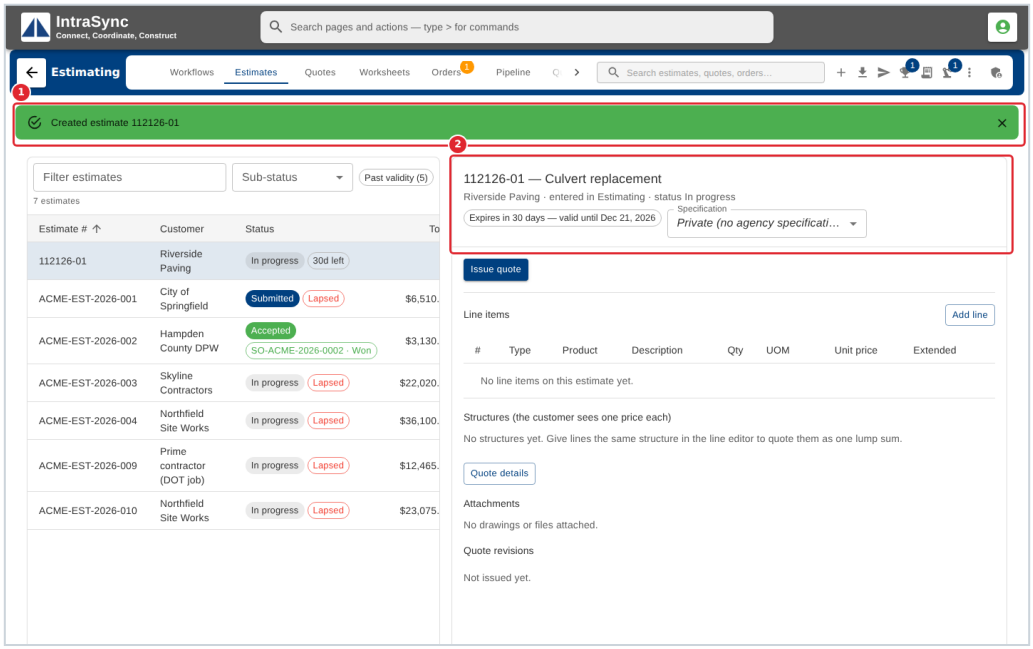
Step 1. Select New estimate in the hub header, or the Build an estimate card on the Workflows tab.



Step 2. Leave Estimate number blank to take the next quote number of the day, or type your own. Then fill in the job name and the customer, and choose the currency.



Step 3. Set Valid until if the quote should expire, and choose a specification if the job is built to one. Leave either blank for no expiry or private work. Then select Create estimate.



Step 4. A message confirms the new estimate. Select it in the list: it starts at In progress, with no lines yet, and its validity shows beside the title.

Tips:

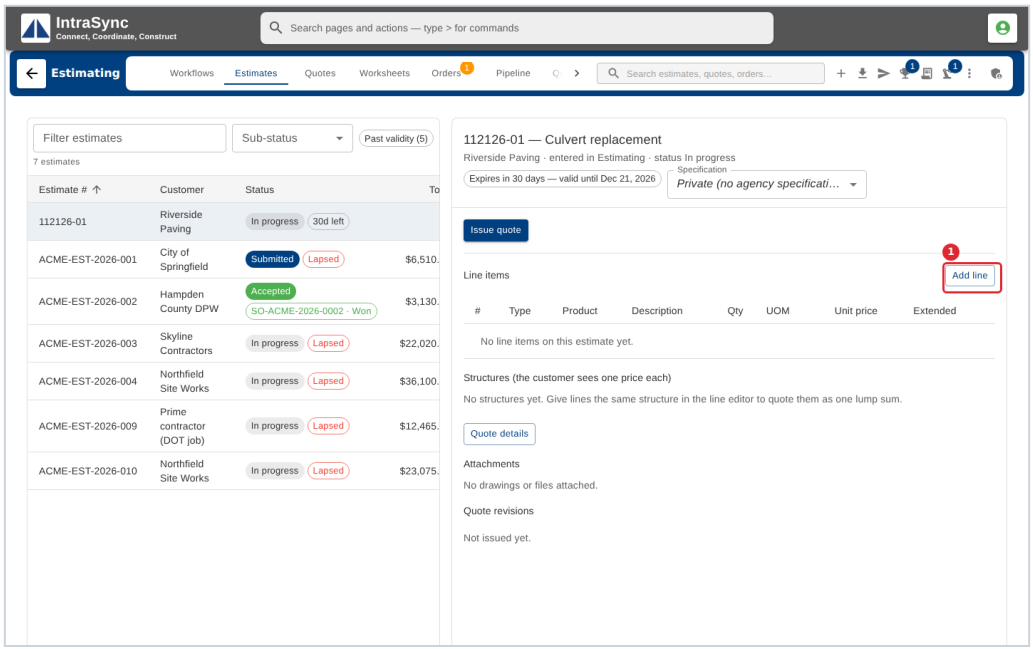
- An estimate number you type is kept, unless it is in the day's quote-number format and already taken: then it moves to the next free number.
- Valid until is never filled in for you. Leave it blank for a quote with no expiry.
- A new estimate starts at In progress with no lines. Add its lines before you issue a quote.

5. Add, change and remove an estimate's lines

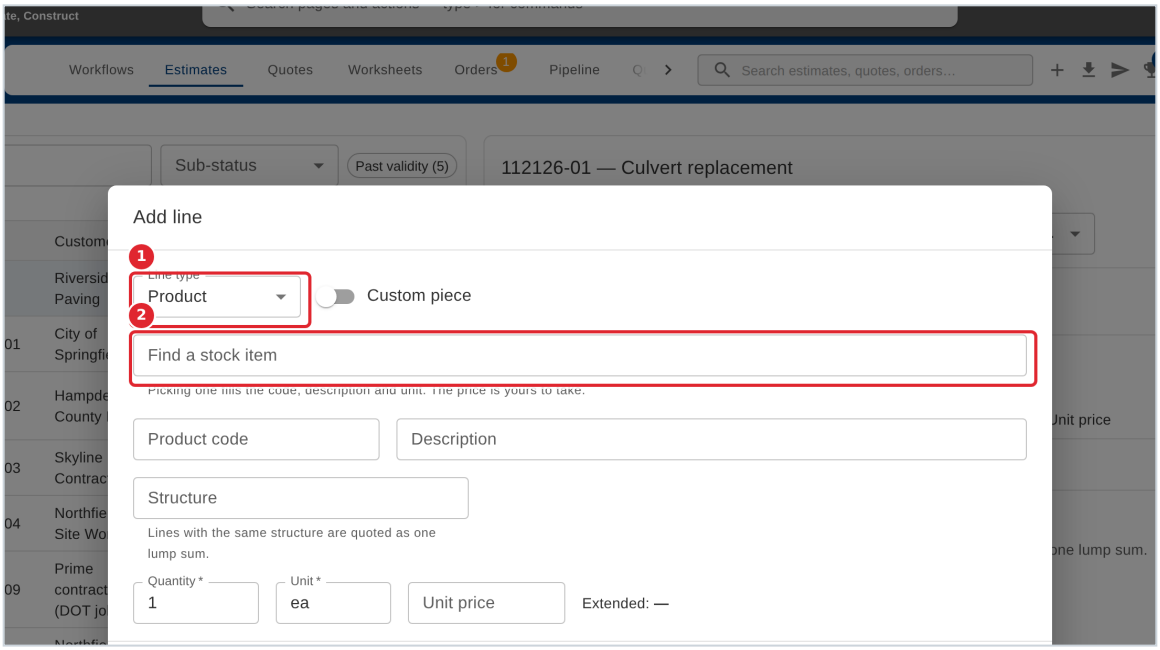
Build up what the estimate quotes: stock items, custom pieces, labor, freight and adders.

Before you start:

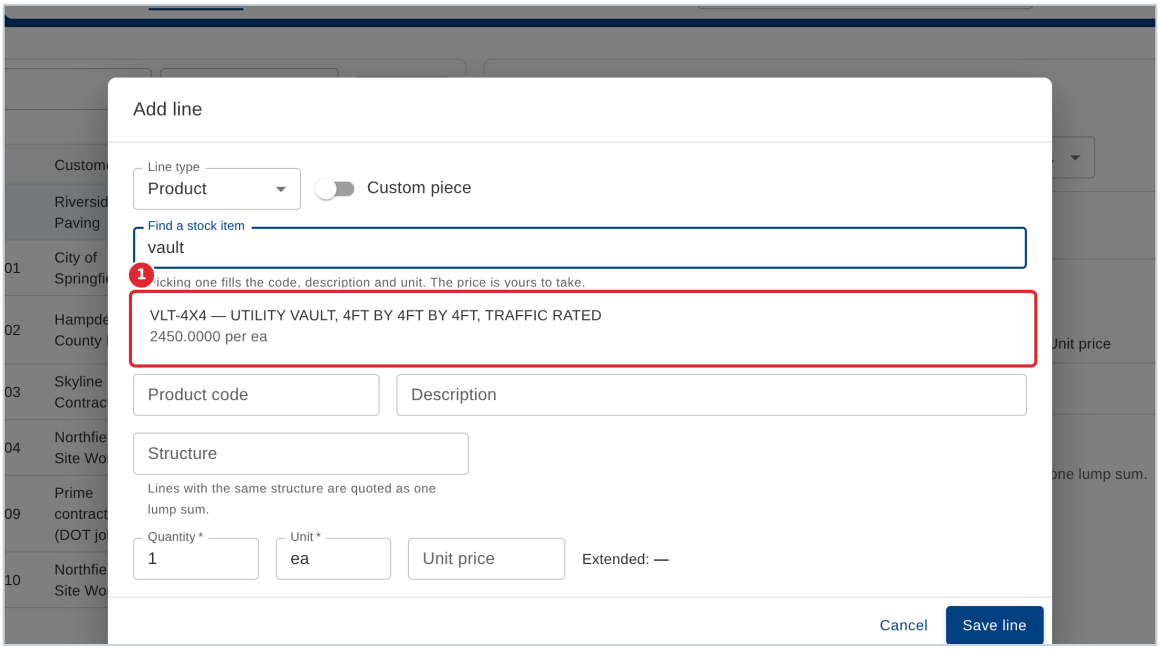
- Lines can be changed only while the estimate is In progress or Revised and has not been converted to an order. A submitted quote is frozen.
- Custom pieces need the company setting Estimators can add custom pieces (Estimating admin > Estimating settings).



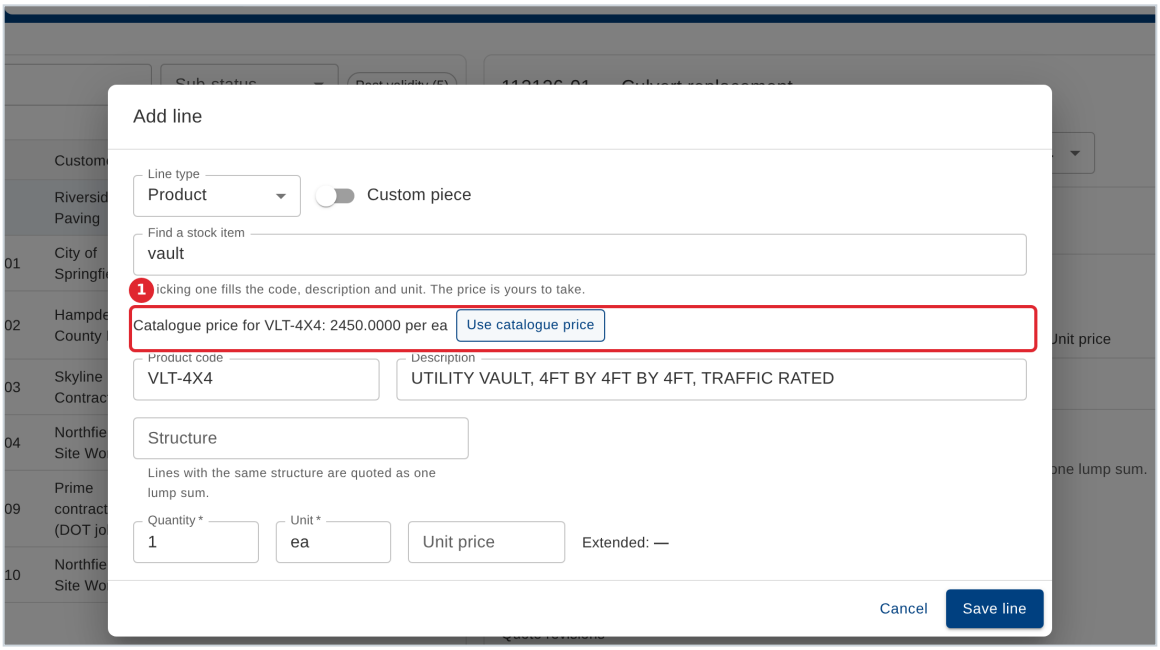
Step 1. On an estimate that is In progress or Revised, select Add line.



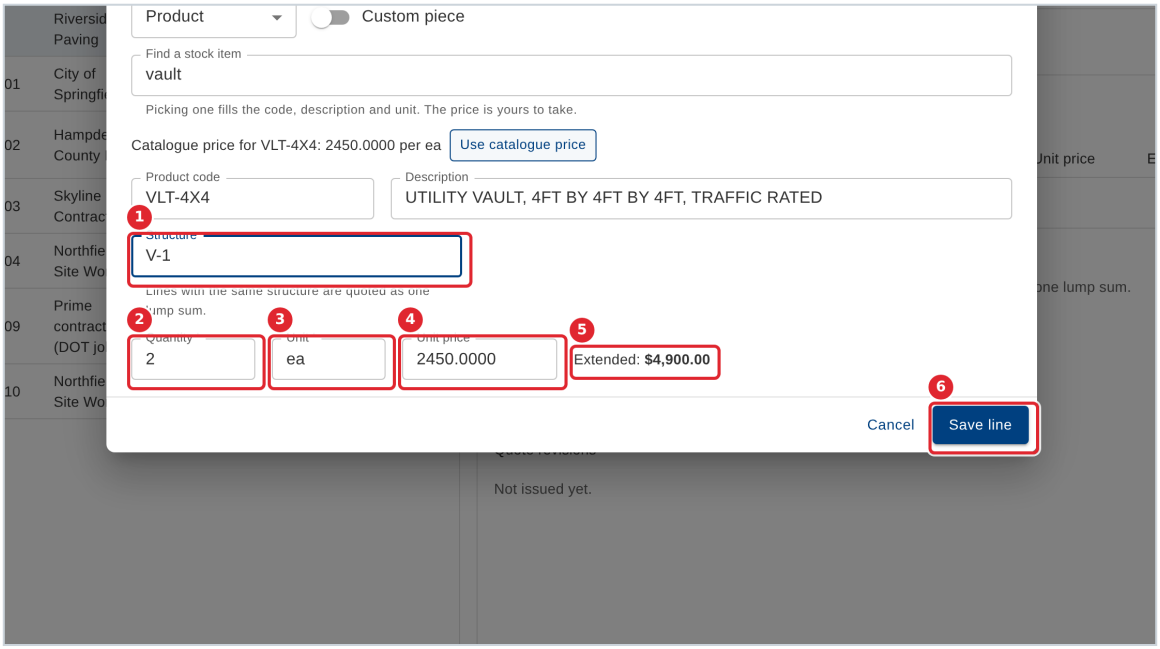
Step 2. Choose the line type: Product, Labor, Freight or Adder. To take a stock item from the item master, type its name, code or description in Find a stock item.



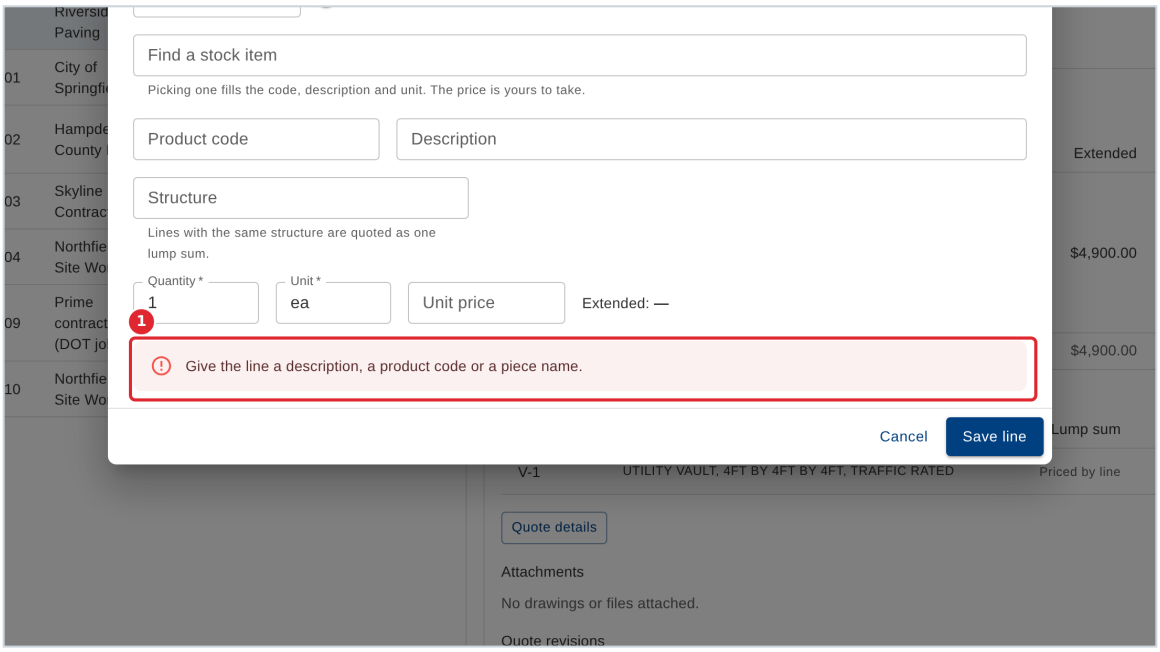
Step 3. Pick the item from the list. Its code, description and unit are filled in for you, and its catalogue price shows beside it when it has one.



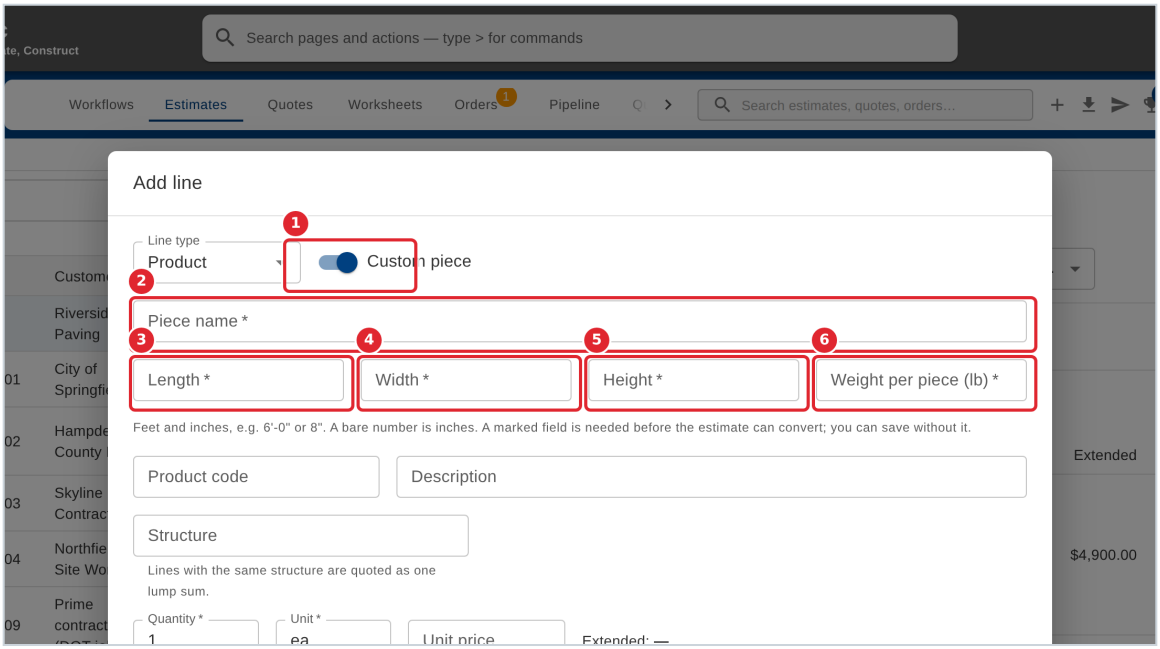
Step 4. The catalogue price is shown, but not filled in: the price is yours to set. Select Use catalogue price to take it.



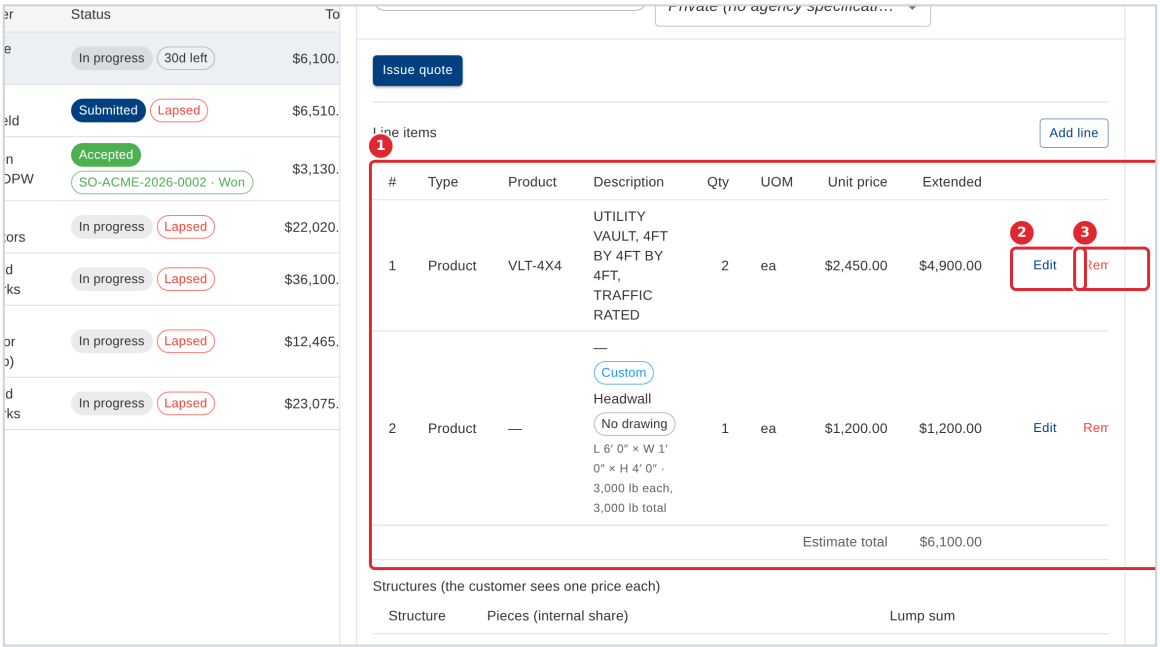
Step 5. Enter the quantity and unit, and check the unit price. When the company quotes structures as one lump sum, give lines that belong together the same Structure. The extended amount updates as you type. Select Save line.



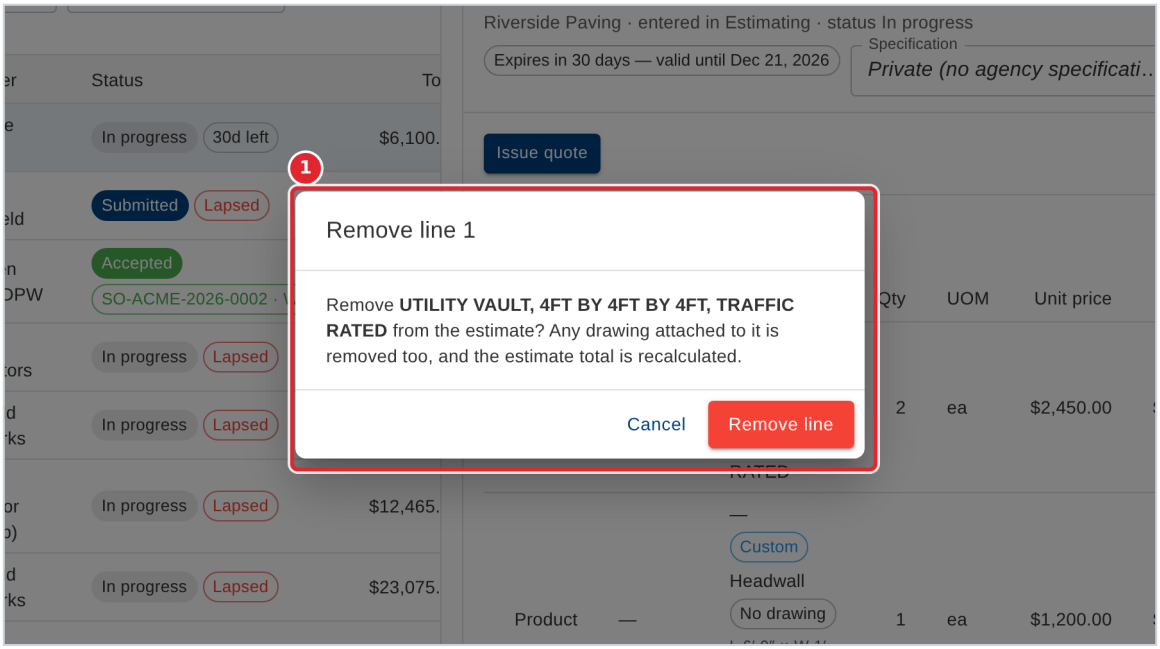
Step 6. The line is not saved until it has a description, a product code or a piece name. The editor lists what is missing above the buttons.



Step 7. For work with no stock item, turn on Custom piece and give the piece name, its size and its weight. Sizes take feet and inches such as 6'-0", or a bare number of inches.



Step 8. The lines and the estimate total appear on the estimate. A custom piece shows its size and weight under the description. Select Edit to change a line, or Remove to take it off.



Step 9. Removing a line asks you to confirm. Any drawing attached to the line goes with it, and the total is worked out again. Select Remove line to confirm, or Cancel to keep it.

Tips:

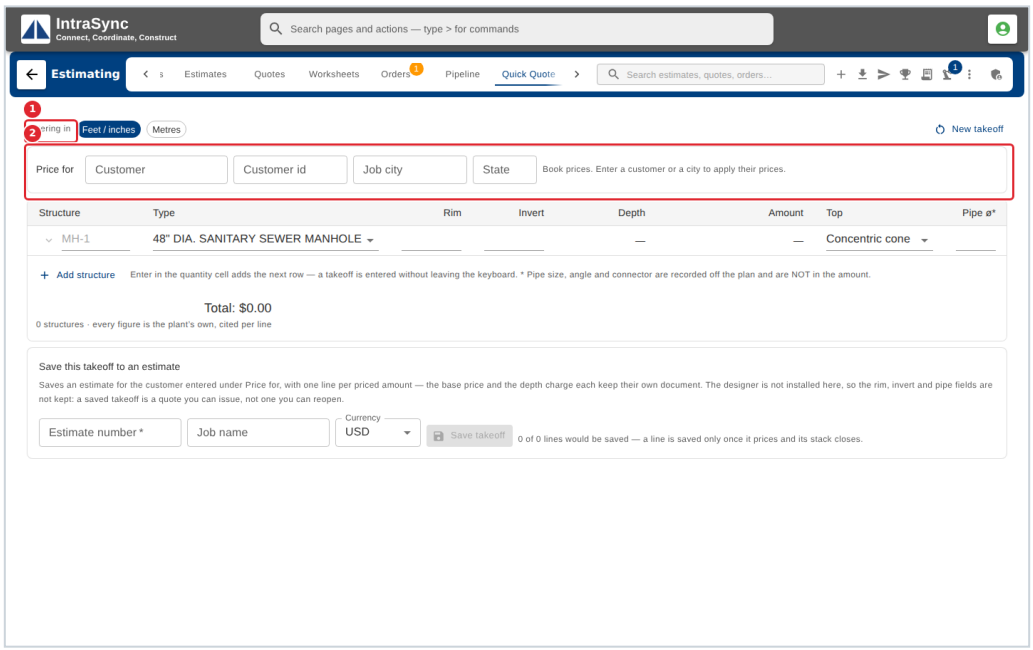
- Quantity must be a number greater than zero, and the unit is required.
- A line needs a description, a product code or a piece name.
- A size must be feet and inches such as 6'-0", or a number of inches, and greater than zero. A weight must be a number of pounds.
- Custom-piece fields your company marks as required can be left blank while you work. The line then lists what is missing, and the estimate cannot convert until it is filled in.
- Lines that share a Structure are quoted to the customer as one lump sum.

6. Price a structure takeoff with Quick Quote

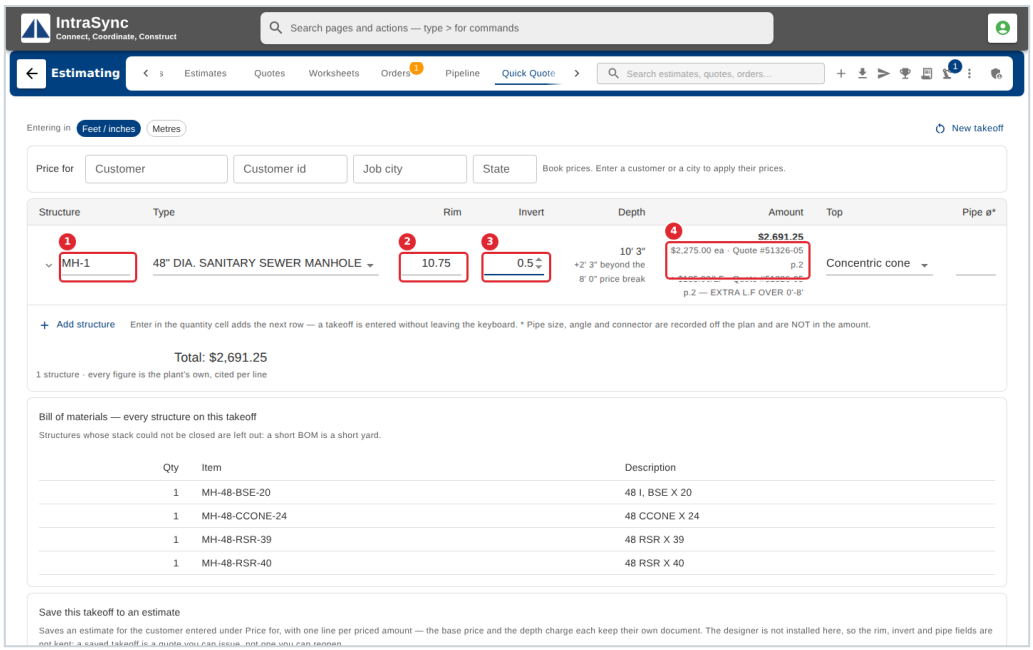
Turn a structure takeoff (a mark, a rim and an invert) into a priced line, its component stack and a bill of materials, from the plant's own price documents.

Before you start:

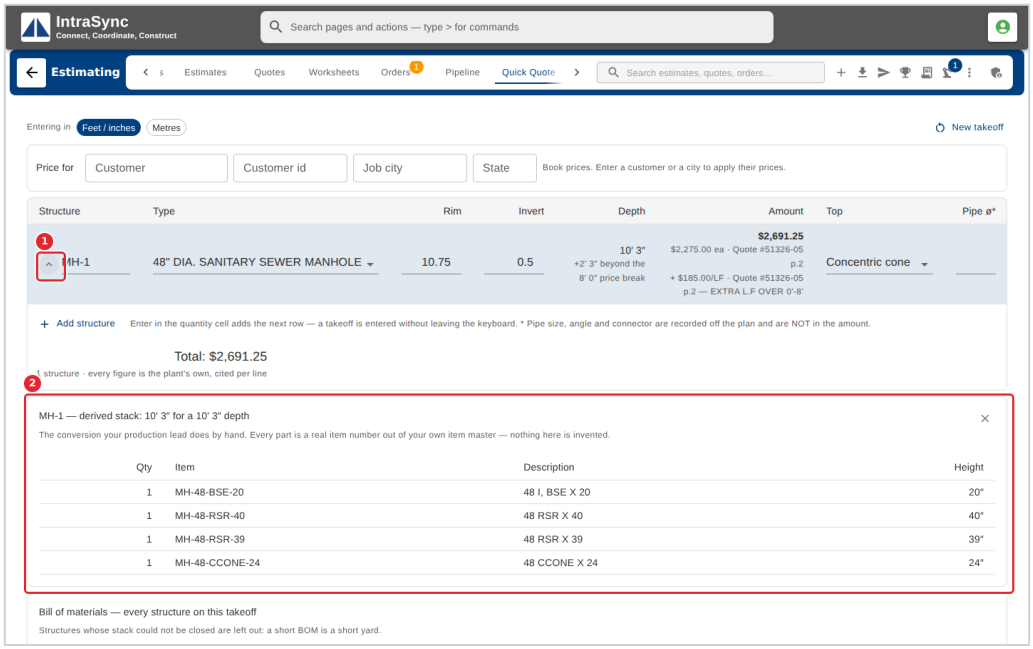
– The structure price book must hold a price for each structure type you quote (Estimating admin > Structure price book).



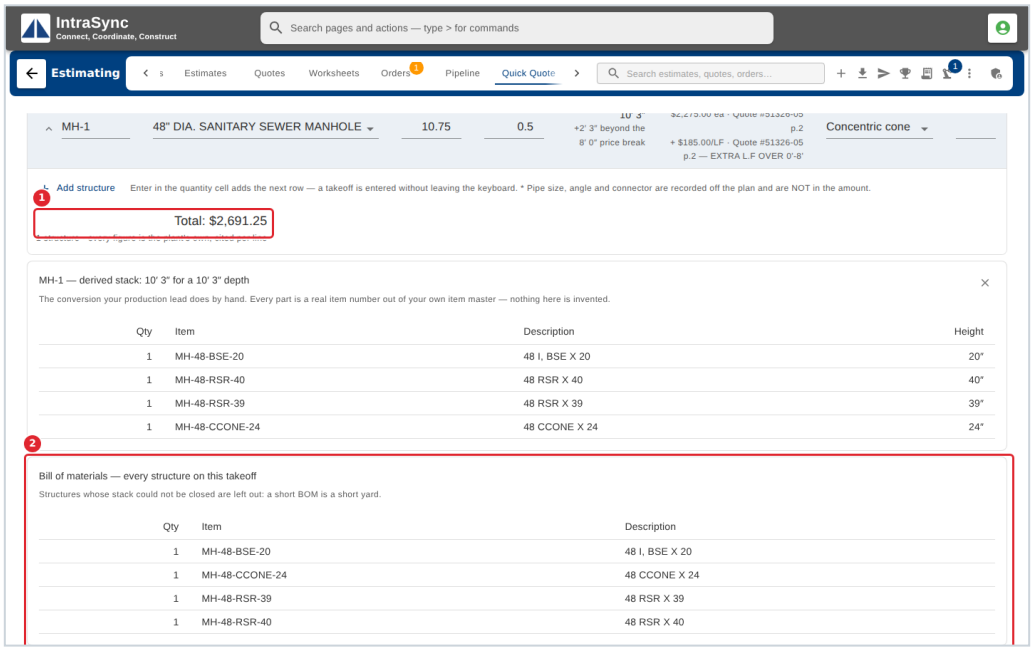
Step 1. Select the Quick Quote tab. Choose whether you enter Feet / inches or Metres, and enter the customer or the job city under Price for to apply their own prices.



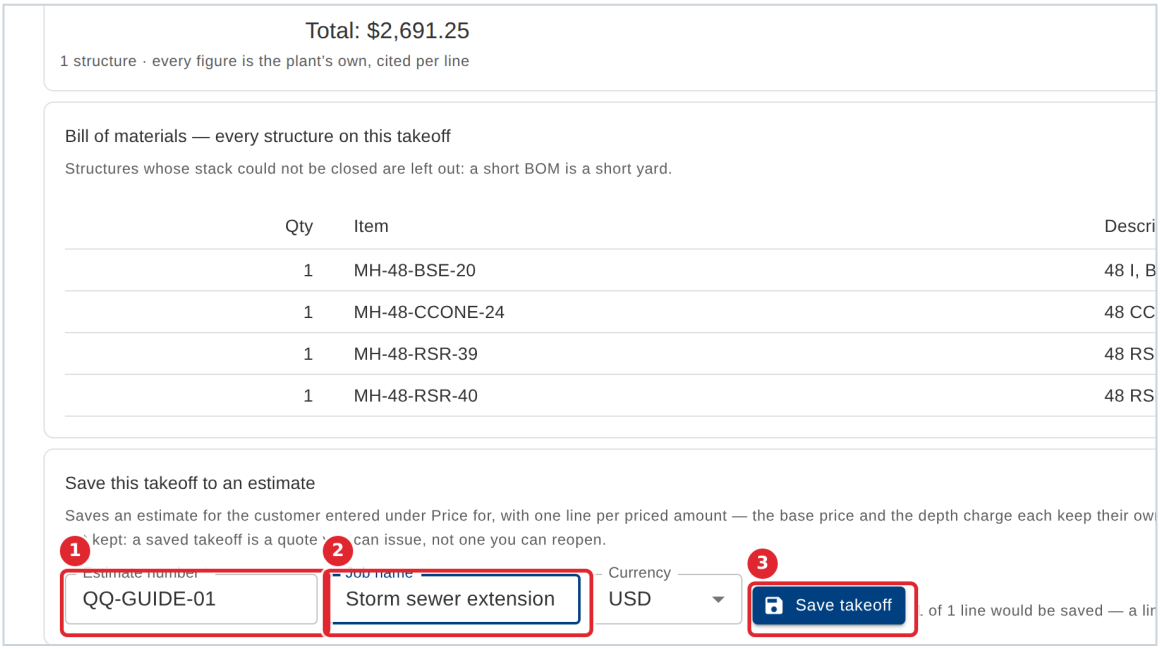
Step 2. Type the structure's mark, its type, and its rim and invert elevations. The depth and the amount are worked out for you, and the amount names the price document it comes from.



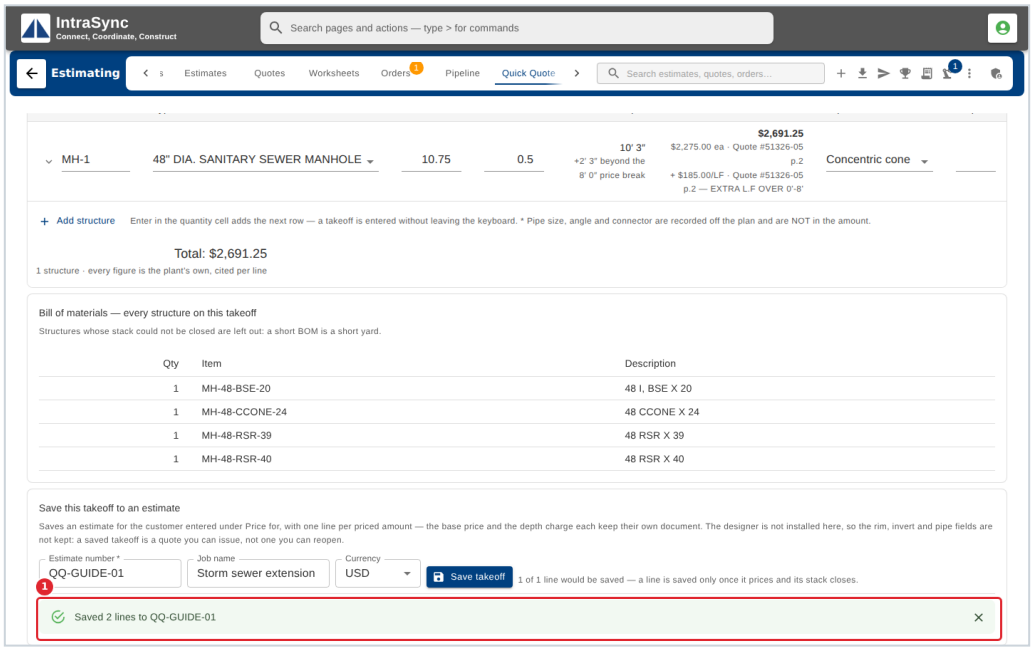
Step 3. Select the arrow at the start of a row to see its derived stack: the base, risers and top chosen from your item master to make up that depth.



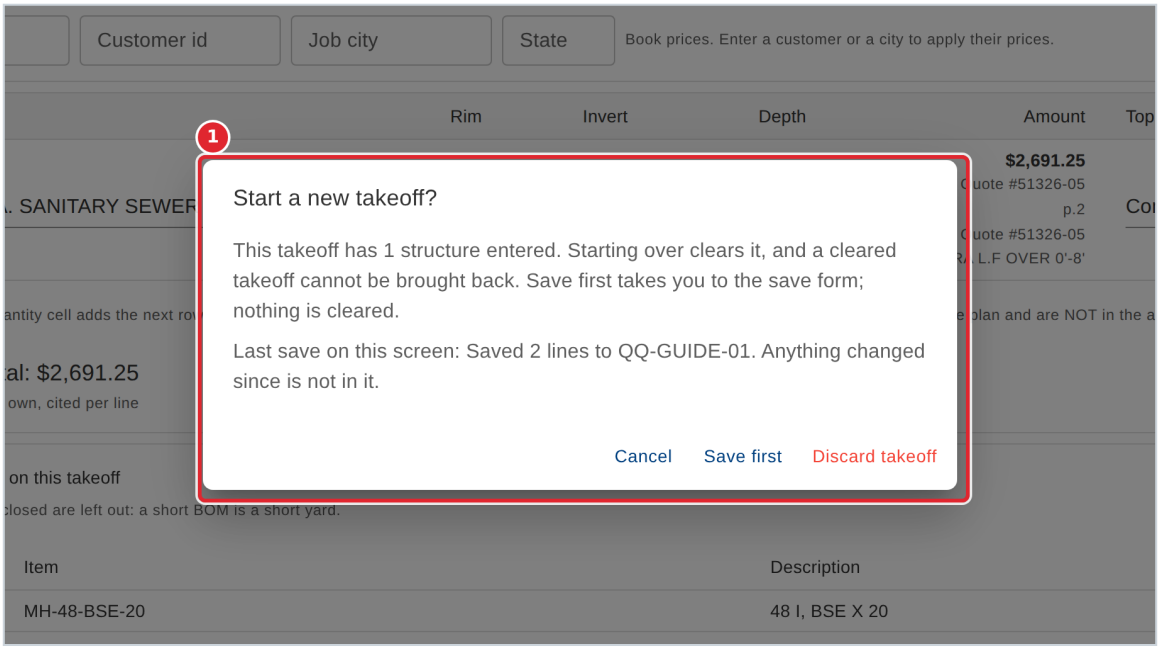
Step 4. Bill of materials adds up the pieces for every structure on the takeoff, and Total gives the takeoff's price. Select Add structure for the next row, or press Enter in the quantity cell.



Step 5. To keep the takeoff, fill in Save this takeoff to an estimate: the estimate number, the job name and the currency, then select Save takeoff. Only lines that price and whose stack closes are saved.



Step 6. A message says how many lines were saved and to which estimate. Find it on the Estimates tab.



Step 7. Select New takeoff to start over. If structures are entered, choose Save first to keep them, or Discard takeoff to clear them; a cleared takeoff cannot be brought back.

Tips:

- Each row explains a problem in words under the grid: a structure type not chosen, a rim at or below the invert, a depth too shallow, or a stack that cannot close the depth exactly.
- Pipe size, angle and connector are recorded off the plan and are not included in the amount.
- Only lines that price and whose stack closes are saved to the estimate.
- New takeoff asks first when structures are entered. Choose Save first to keep them.

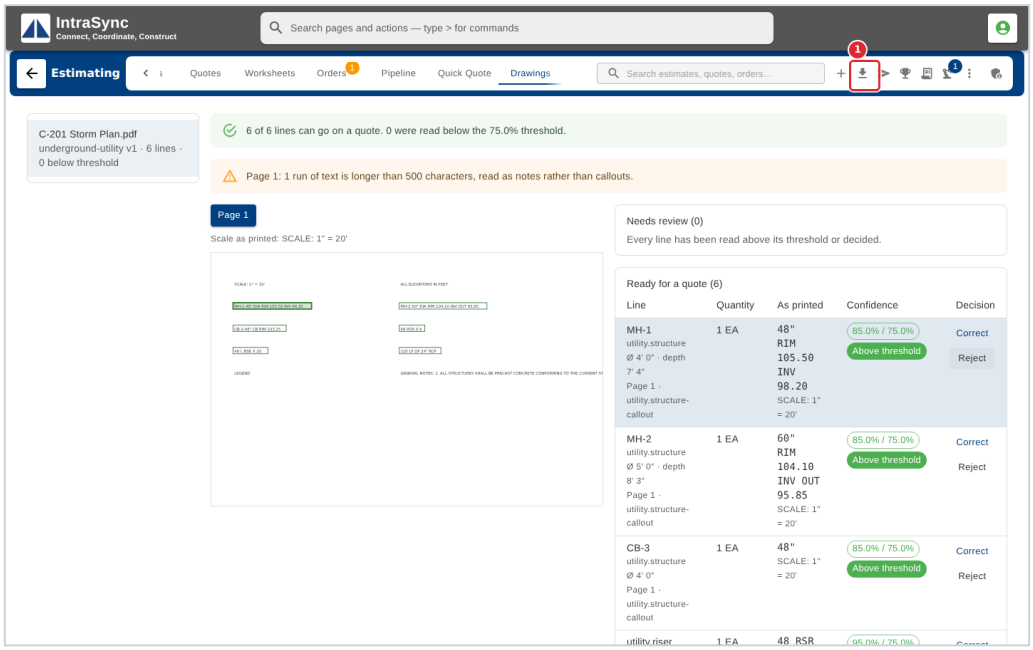
This is shown in the Estimating video at 1:55.

7. Import a saved takeoff as an estimate

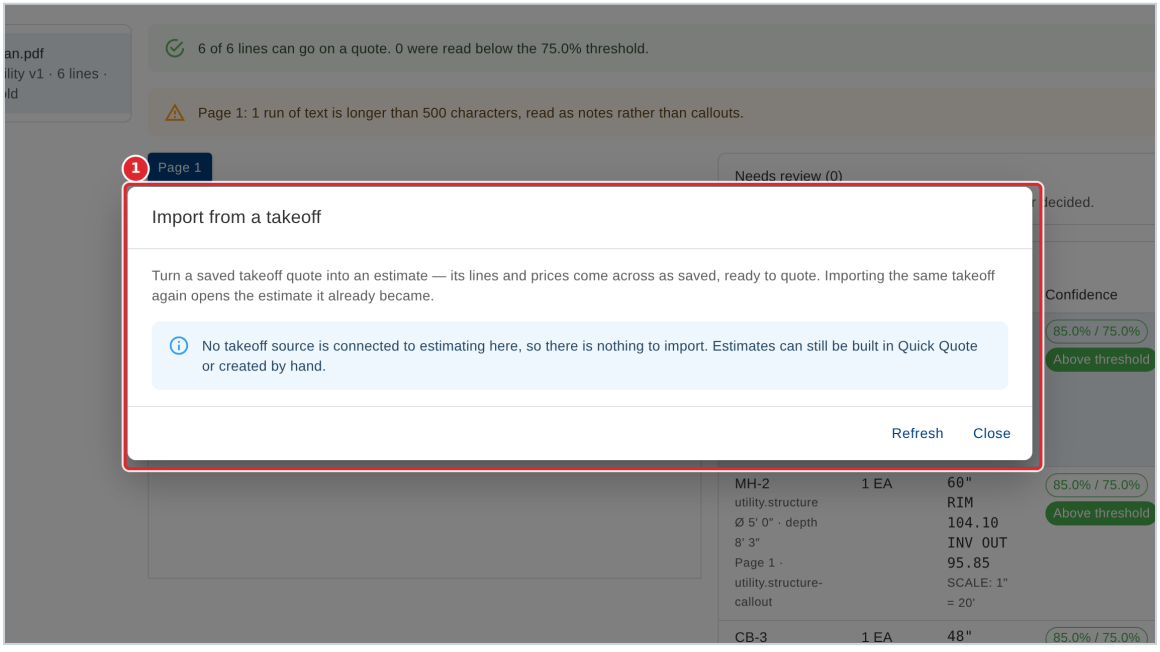
Bring a takeoff saved in another tool in as an estimate, with its lines and prices, ready to quote.

Before you start:

– A takeoff source must be connected to Estimating in your installation.



Step 1. Select Import from a takeoff in the hub header, or the card on the Workflows tab.



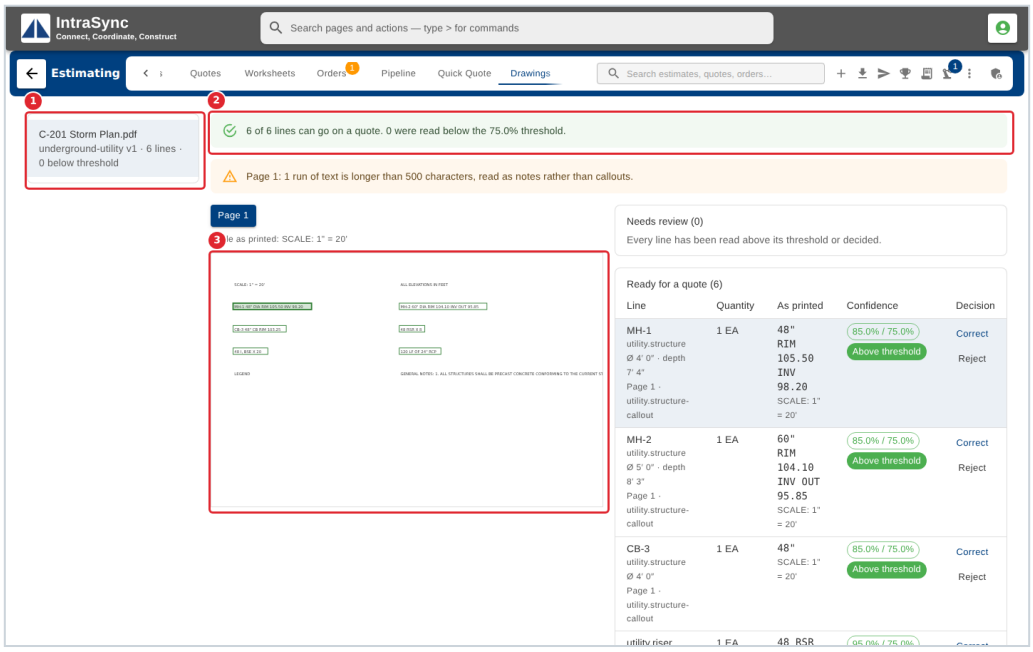
Step 2. Saved takeoffs are listed by source, with their customer, structures and total. Select Import to turn one into an estimate with its lines and prices; a takeoff already imported offers Open instead. When no takeoff source is connected, the dialog says so.

Tips:

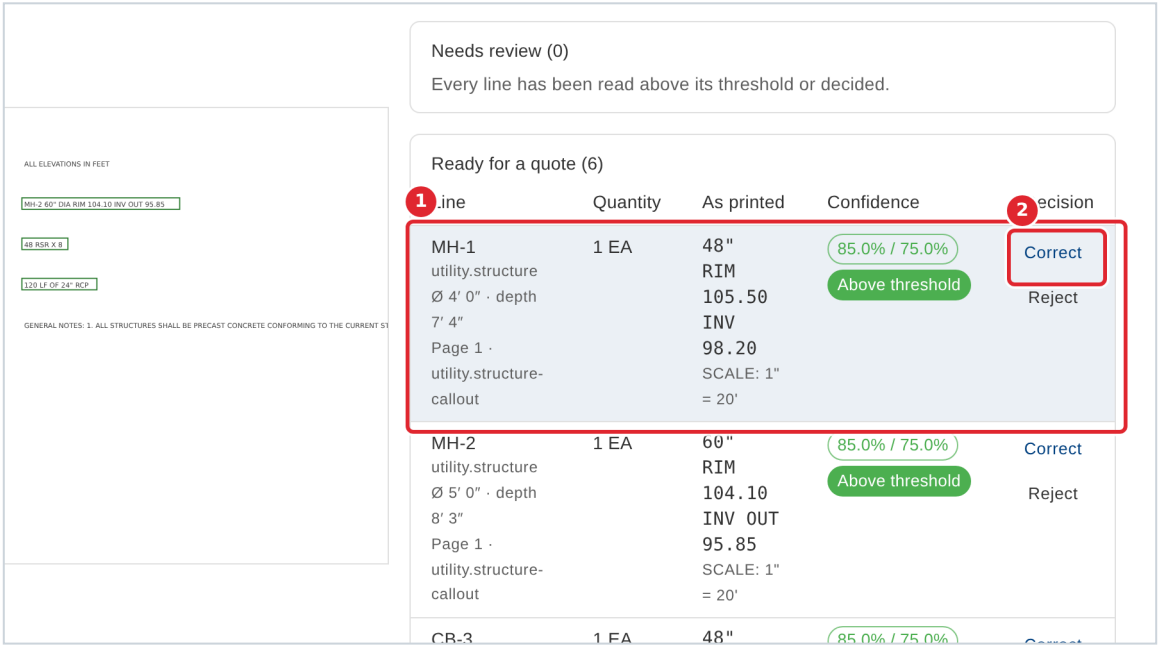
– Importing the same takeoff again opens the estimate it already became; it never makes a second one.

8. Check the quantities read from a drawing

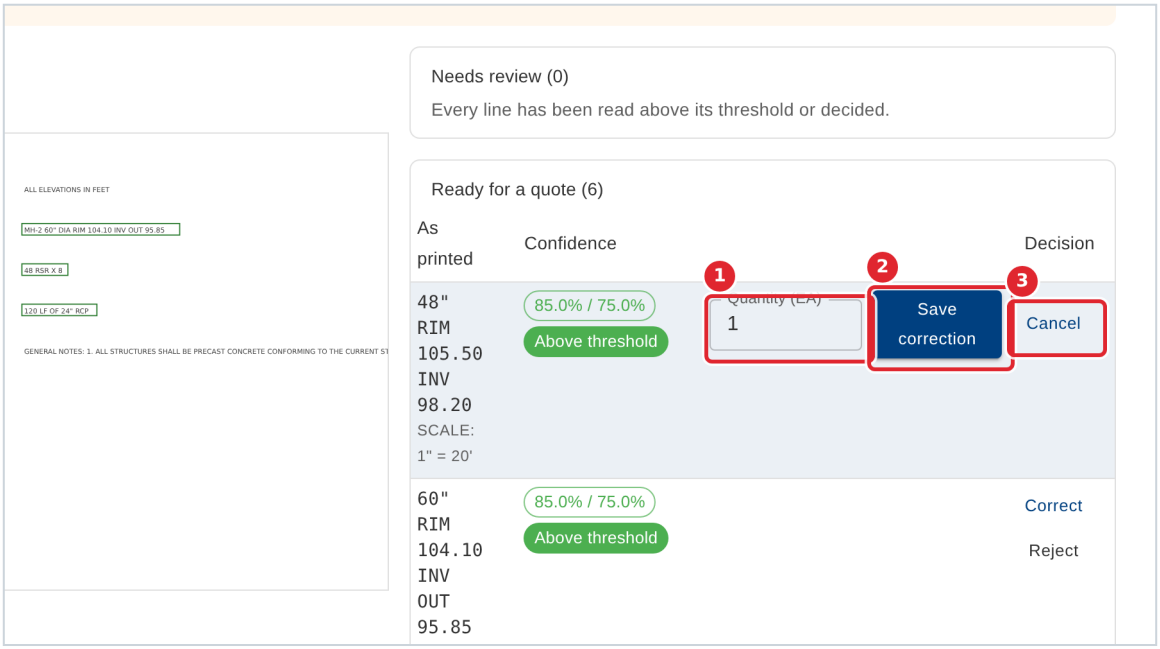
Decide which quantities read from a scraped drawing may go on a quote.



Step 1. Select the Drawings tab. Choose a scraped drawing on the left (1). The summary says how many lines can go on a quote (2), and the page shows where each line was read (3).



Step 2. Lines are sorted into Needs review, Ready for a quote and Rejected. For each line, check the quantity against what was printed, then select Accept, Correct or Reject.



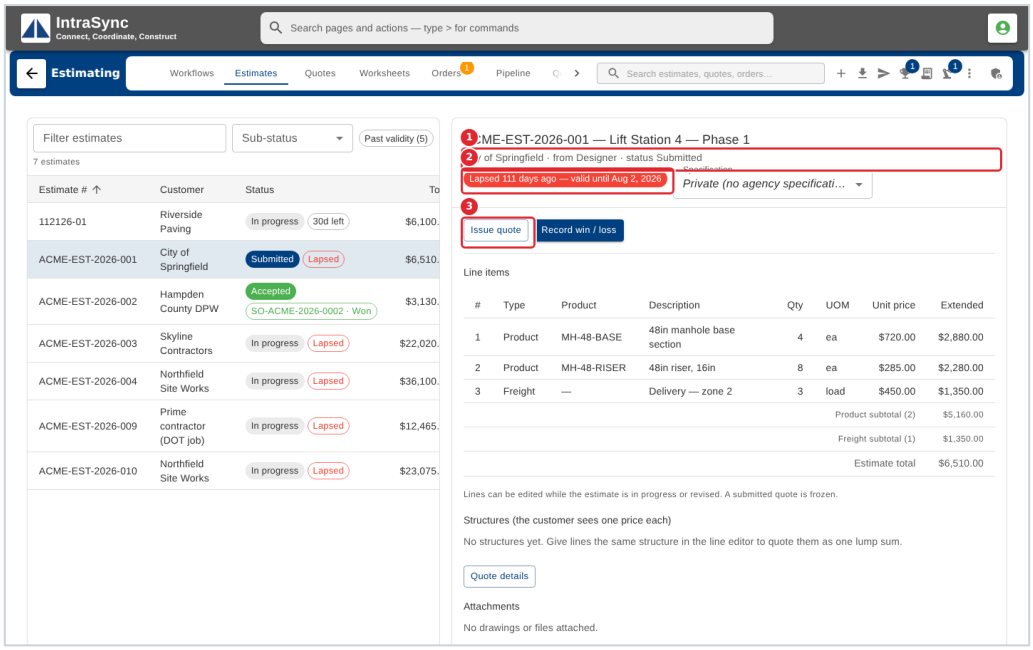
Step 3. Correct opens a quantity field on the line. Type the right quantity and select Save correction, or Cancel.

Tips:

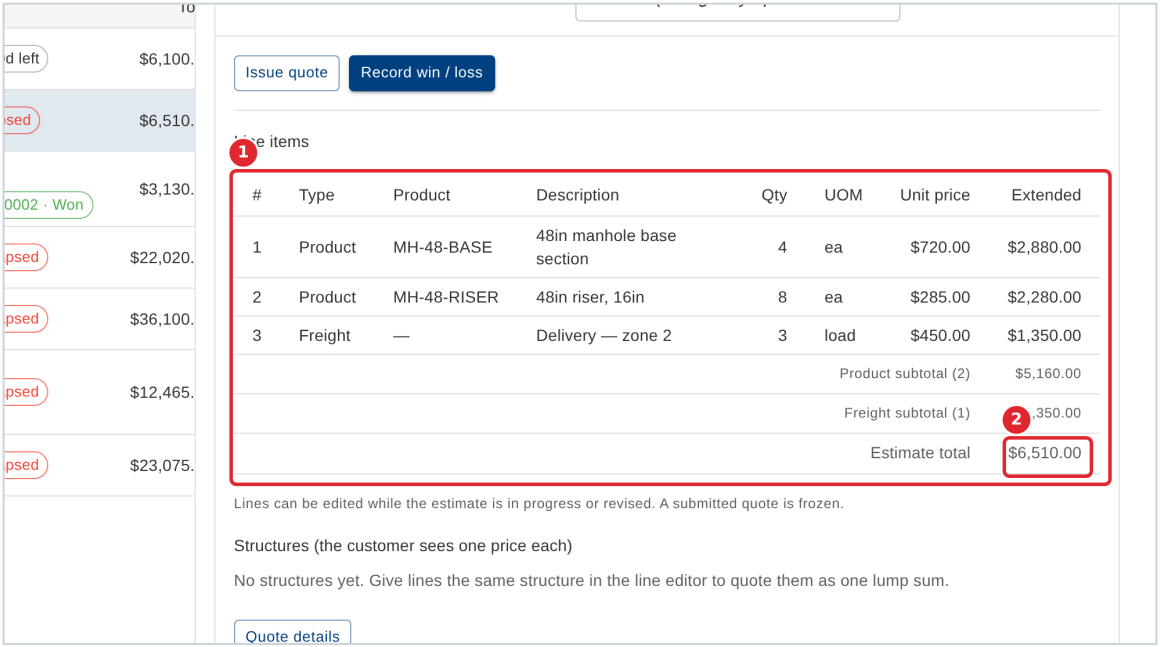
- Each line shows its confidence against the threshold. Lines read below the threshold wait under Needs review until someone decides them.
- If someone else decided a line after you did, their decision stands, and the screen says so.

9. Read an estimate

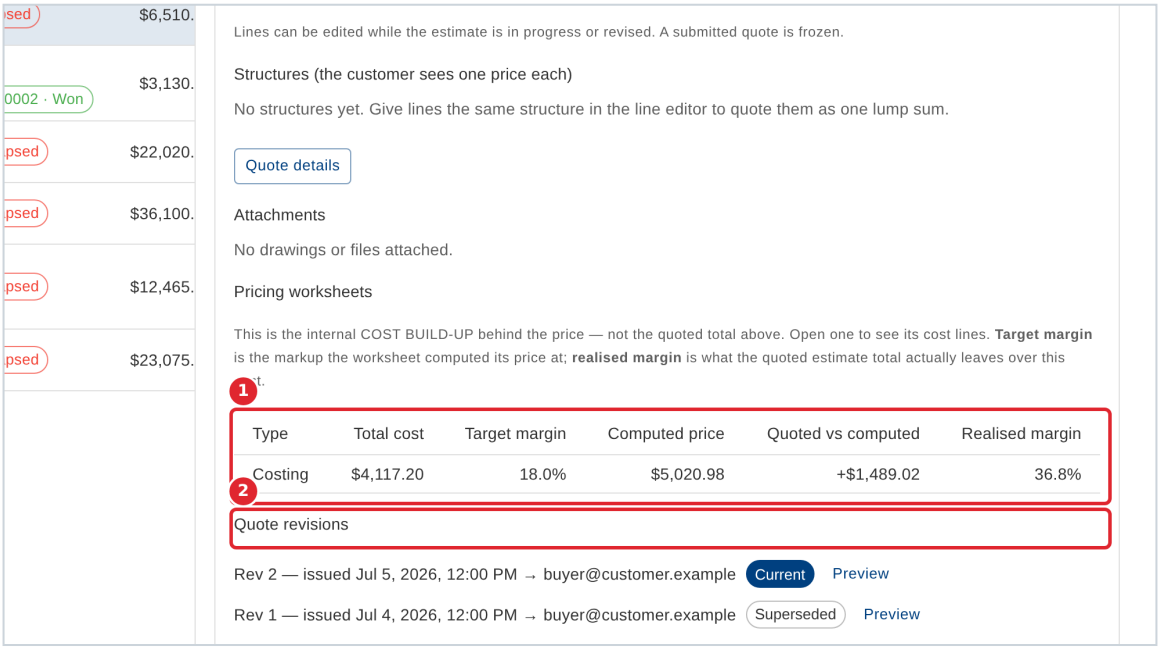
See everything about one estimate in one place: its lines and total, the cost behind the price, every quote issued, the customer's decision and its sales order.



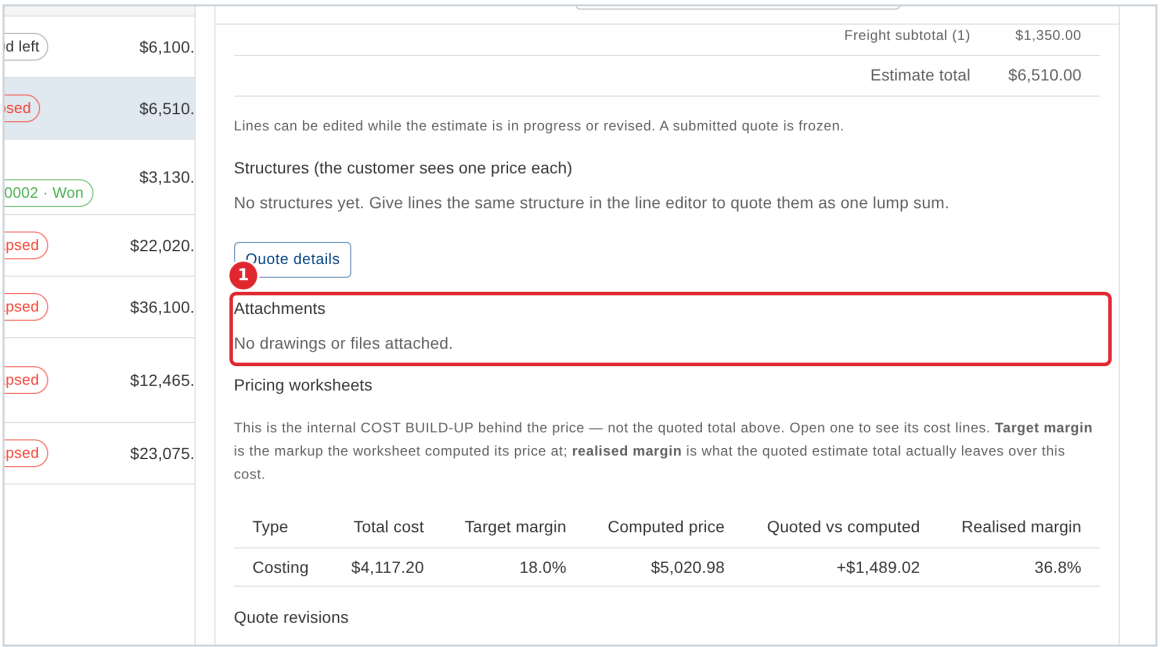
Step 1. Select an estimate in the list. The top of the pane names it, the customer, where it came from and its status (1), and how long its quote is valid (2). The buttons below offer the next step for that status (3).



Step 2. Line items list what is quoted, with a subtotal for each line type and the estimate total at the foot.



Step 3. Further down, Pricing worksheets shows the cost build-up behind the price and the margin it leaves, and Quote revisions lists every quote issued, each with Preview.



Step 4. Attachments lists the drawings and files kept with the estimate. Use Kind and Belongs to on each file to say what it is and which line it belongs to.

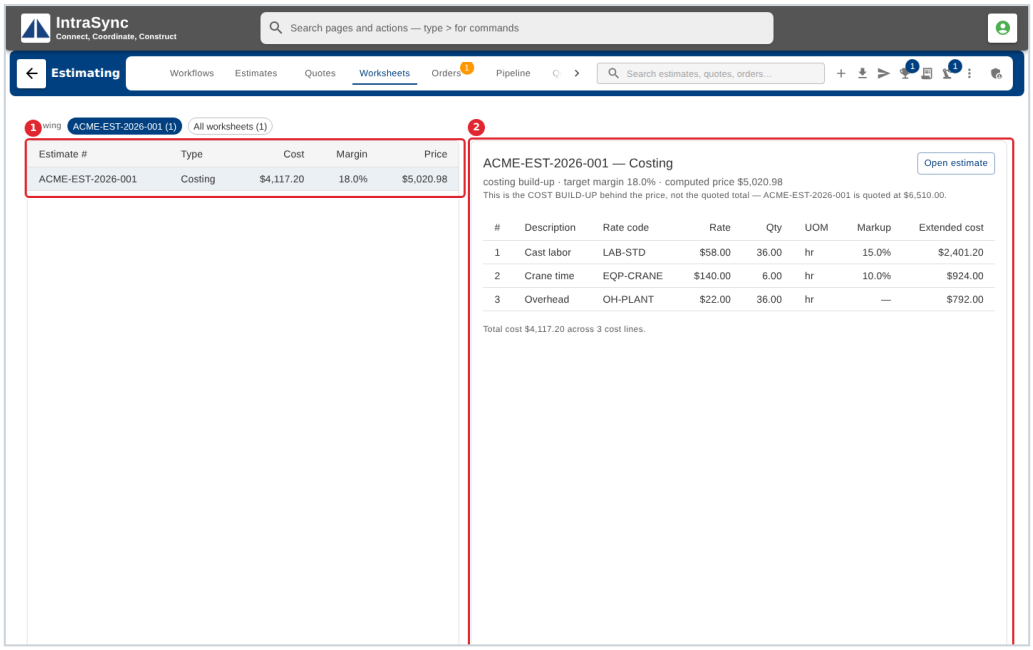
Tips:

- The validity chip turns red once the quote has lapsed.
- When the stored total does not equal the sum of the lines, the estimate says so under the lines.
- Once an estimate is converted, its header names the sales order and the order's status.

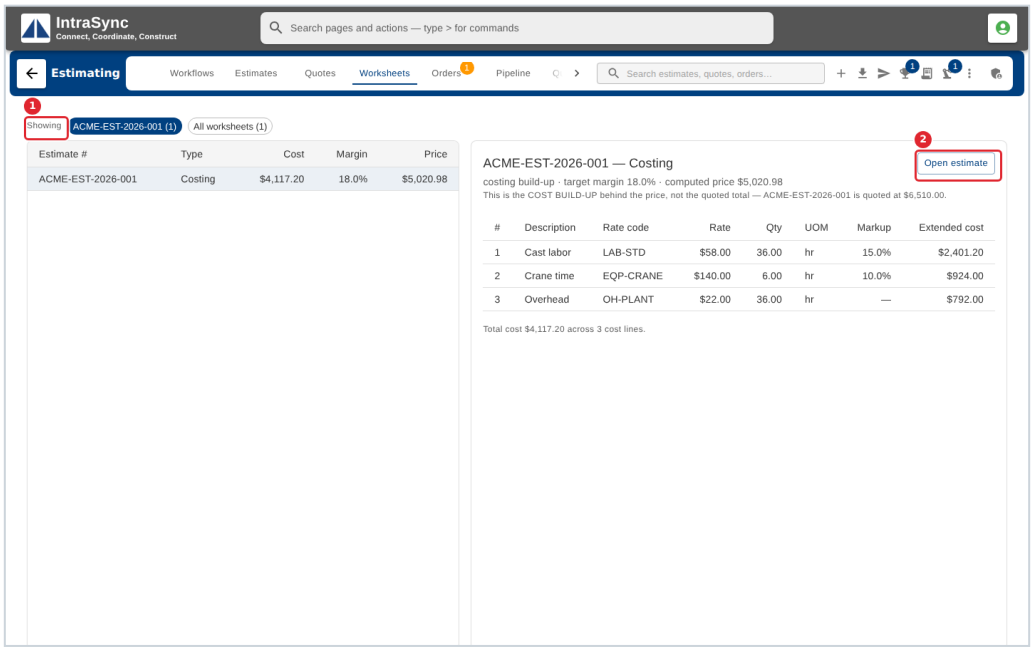
This is shown in the Estimating video at 0:17.

10. Review the cost build-up behind a price

Check what the price was built from: each cost line, its rate and markup, the target margin and the margin the quoted total really leaves.



Step 1. Select a worksheet row on the estimate. The Worksheets tab opens on it: each cost line with its rate, quantity and markup, and the total cost.



Step 2. Use the chips at the top to see only this estimate's worksheets or all of them. Select Open estimate to go back to the estimate.

Tips:

– A worksheet is the internal cost build-up, not the quoted total. Worksheets are read here; they are not edited on this tab.

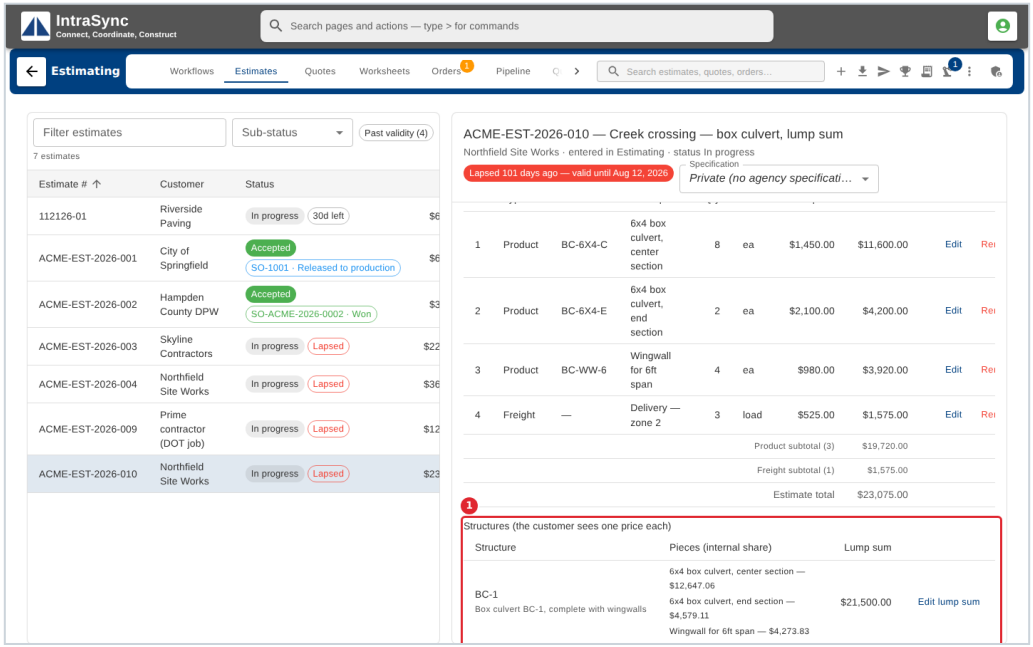
This is shown in the Estimating video at 0:21.

11. Quote a structure as one lump sum

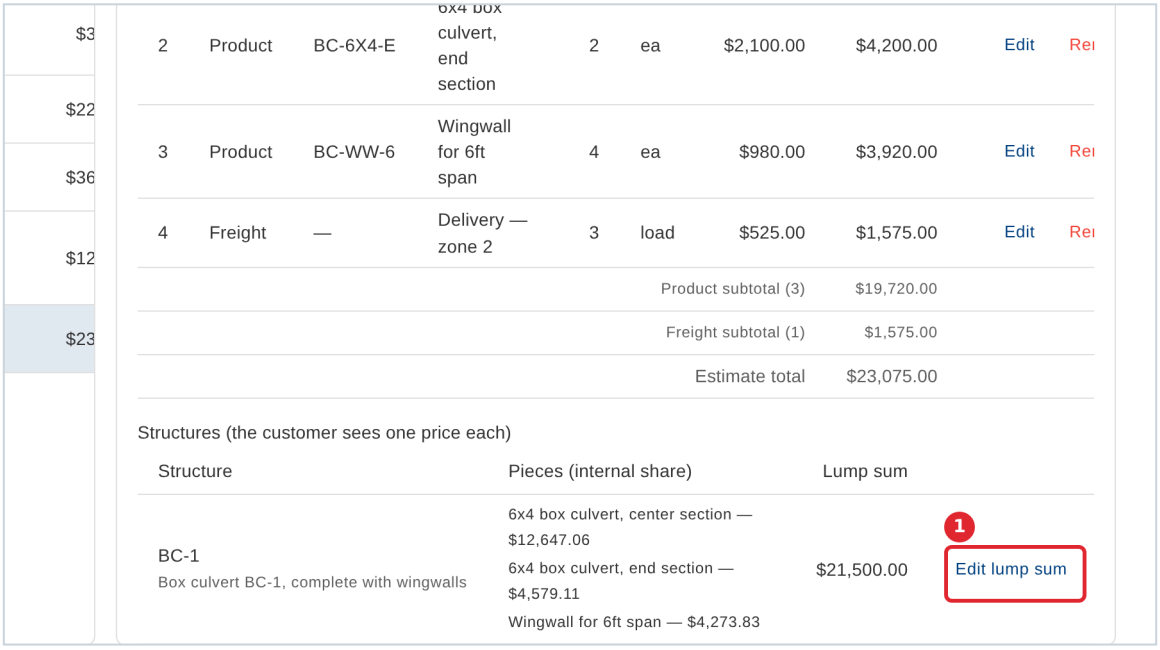
Show the customer one price for a structure made of several pieces, while each piece keeps an internal share for the sales order.

Before you start:

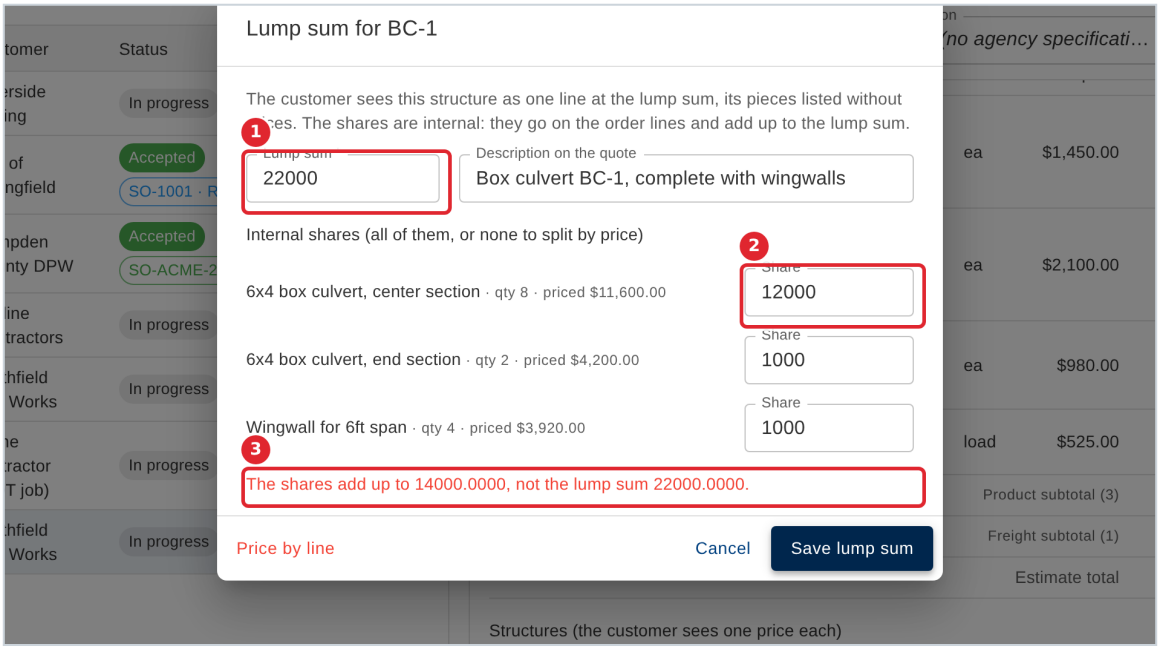
– Your company must quote at structure level. Give lines the same Structure in the line editor to group them.



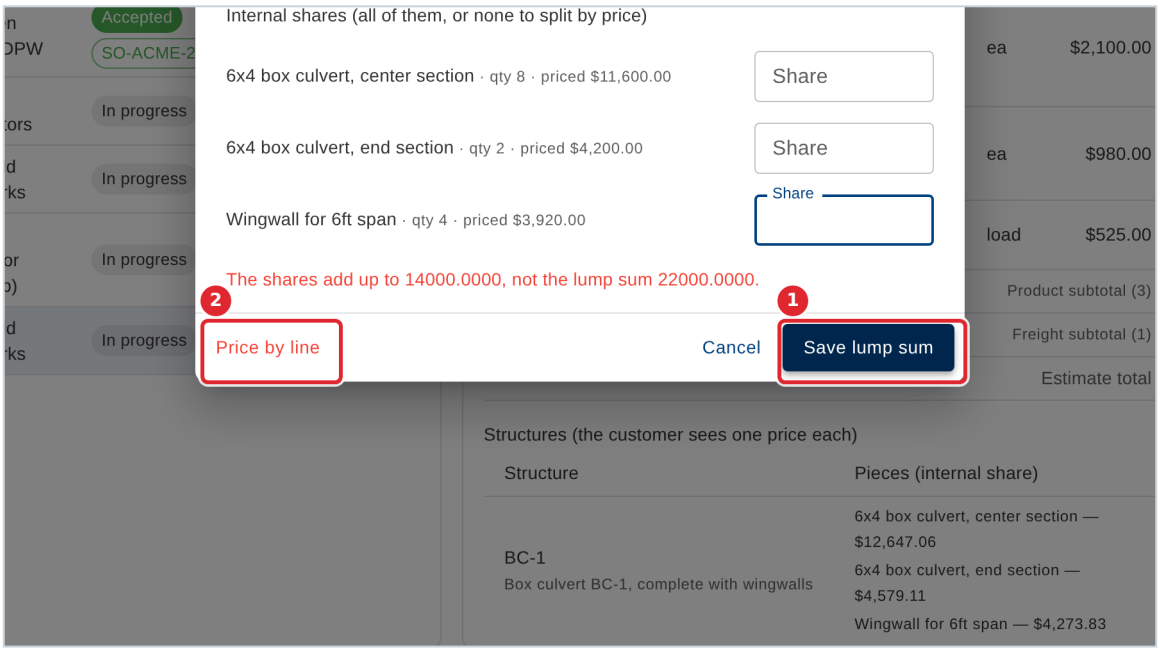
Step 1. Lines given the same Structure are grouped under Structures. The customer sees each structure as one price; the pieces and their internal shares stay on your side.



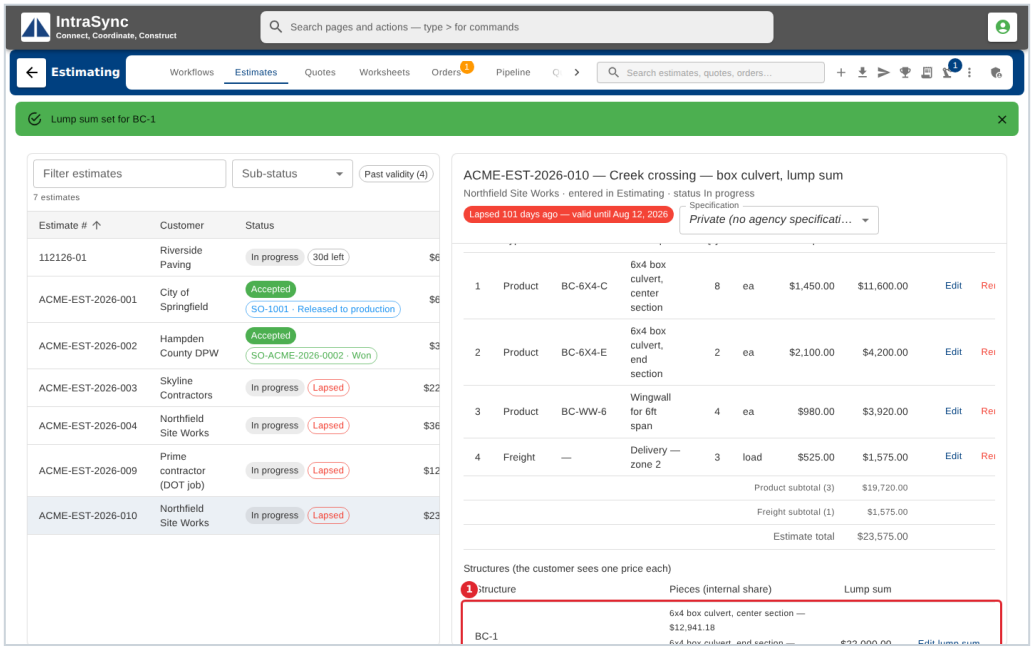
Step 2. Select Set lump sum, or Edit lump sum when one is already set.



Step 3. Enter the Lump sum and the description the quote shows. Type a share for every piece, or leave every share blank to split the lump sum by the pieces' prices. Shares that do not add up to the lump sum are refused, and the dialog says by how much.



Step 4. Select Save lump sum. Price by line removes the lump sum and goes back to pricing each piece.



Step 5. The structure's row shows the new lump sum and each piece's share, and the estimate total is worked out again.

Tips:

- The lump sum must be an amount in whole cents.
- Type a share for every piece, or leave every share blank to split the lump sum by the pieces' prices.
- Shares that do not add up to the lump sum are refused, never rescaled.
- When your company keeps each piece's price to the cent, the structure's row also says when a lump sum cannot be split into whole cents for each piece, and names the nearest lump sums that can. The quote cannot be issued until the lump sum or a quantity changes.
- A line whose Structure differs only in capital letters or spaces is not part of that structure. The structure's row names the line and tells you how to correct it.

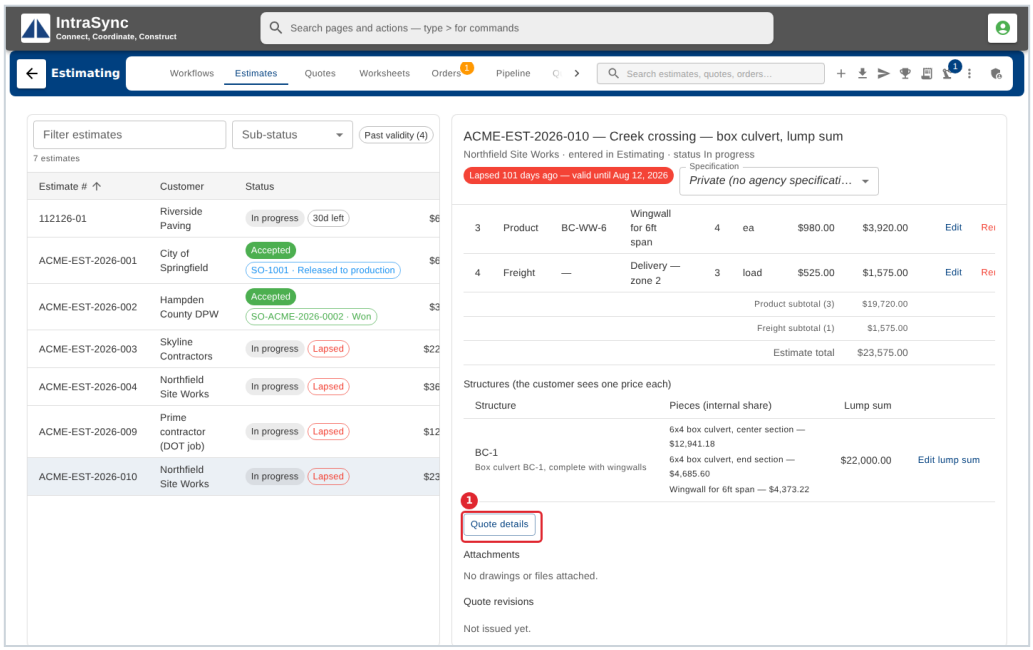
This is shown in the Estimating video at 1:20.

12. Fill in the quotation contract details

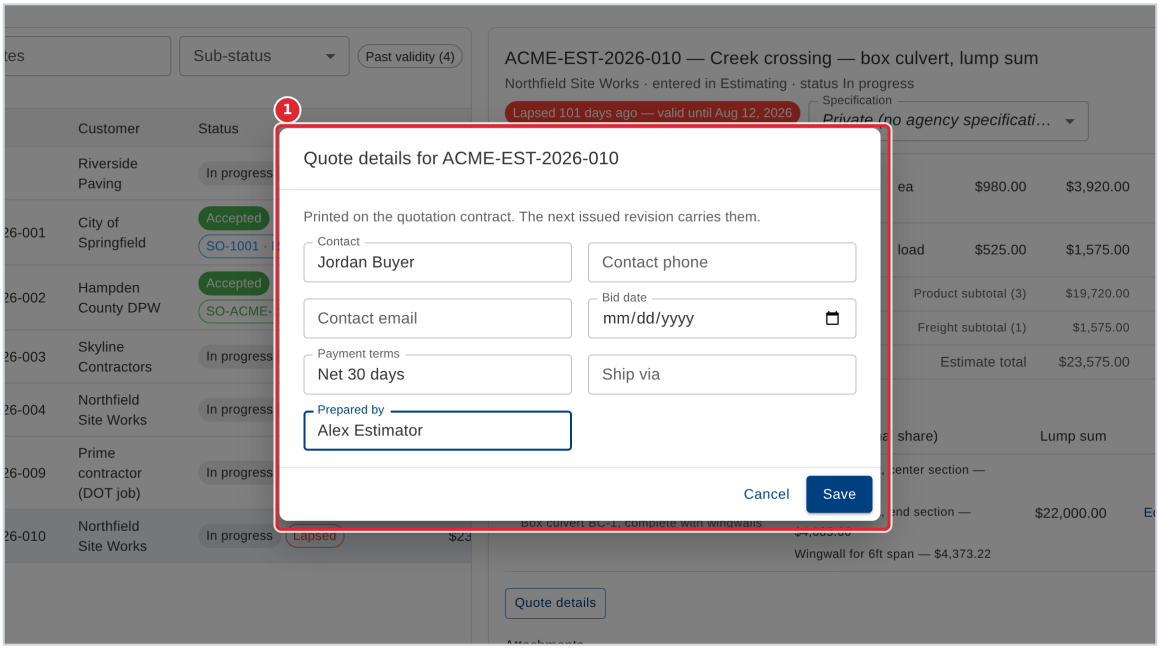
Put the customer contact, the bid date, the payment terms, the shipping method and who prepared the quote on the printed quotation contract.

Before you start:

– Quote details appear only when your company prints its quotes as a quotation contract.



Step 1. When your quotes print as a quotation contract, select Quote details on the estimate.



Step 2. Fill in the customer's contact, phone and email, the bid date, the payment terms, the shipping method and who prepared the quote. Every field is optional. Select Save; the next quote you issue carries them.

Tips:

– Every field is optional, and clearing a field removes it. The details print on the next revision you issue, not on revisions already issued.

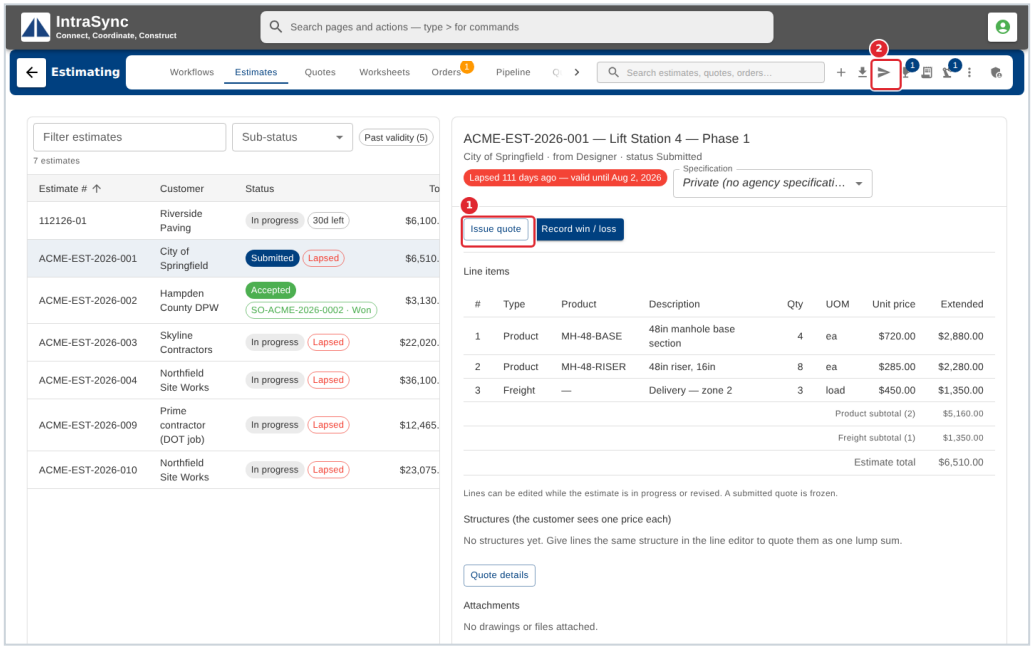
This is shown in the Estimating video at 1:35.

13. Issue a quote

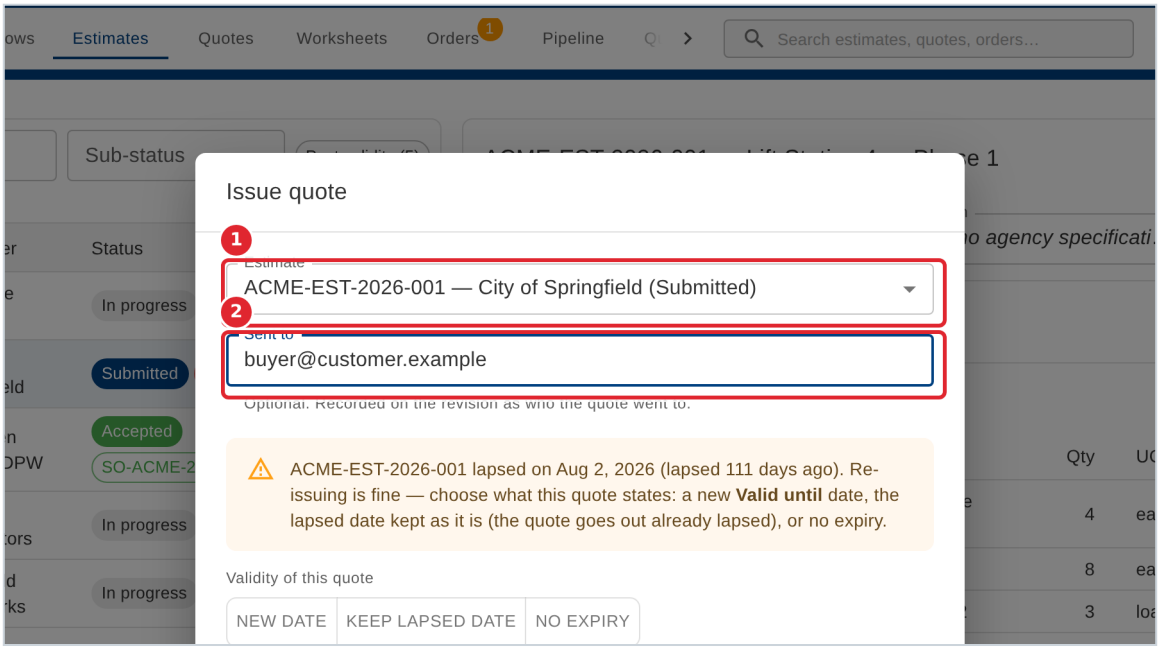
Send the customer a priced estimate as a new quote revision, and keep a permanent record of exactly what was sent.

Before you start:

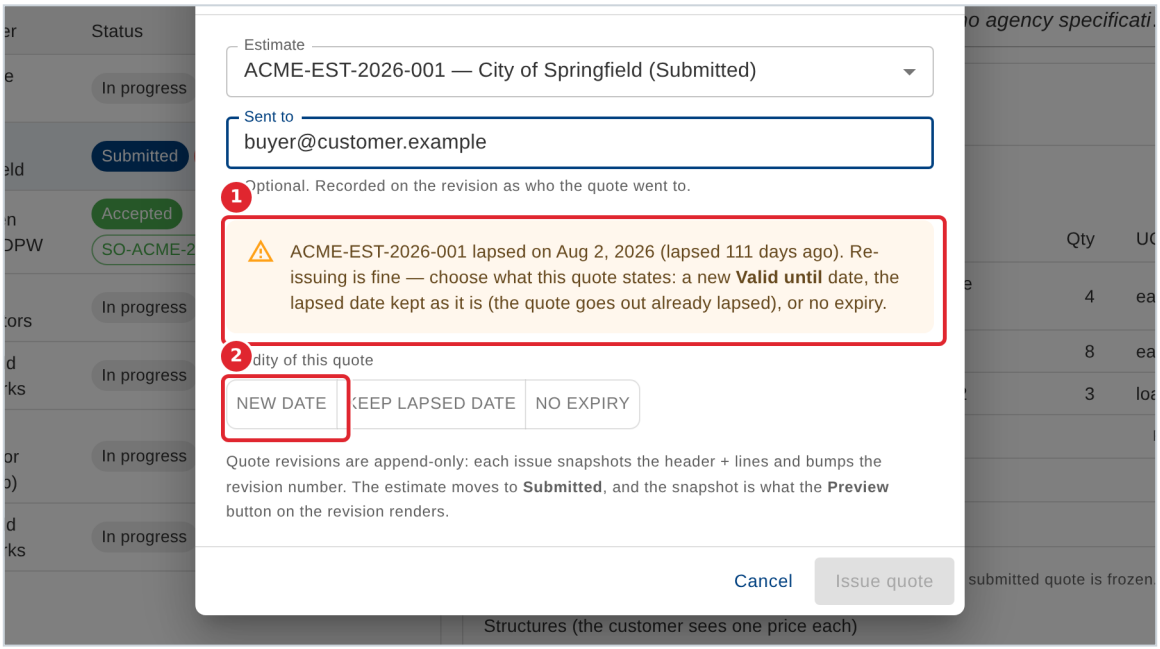
– The estimate must be In progress, Revised or Submitted.



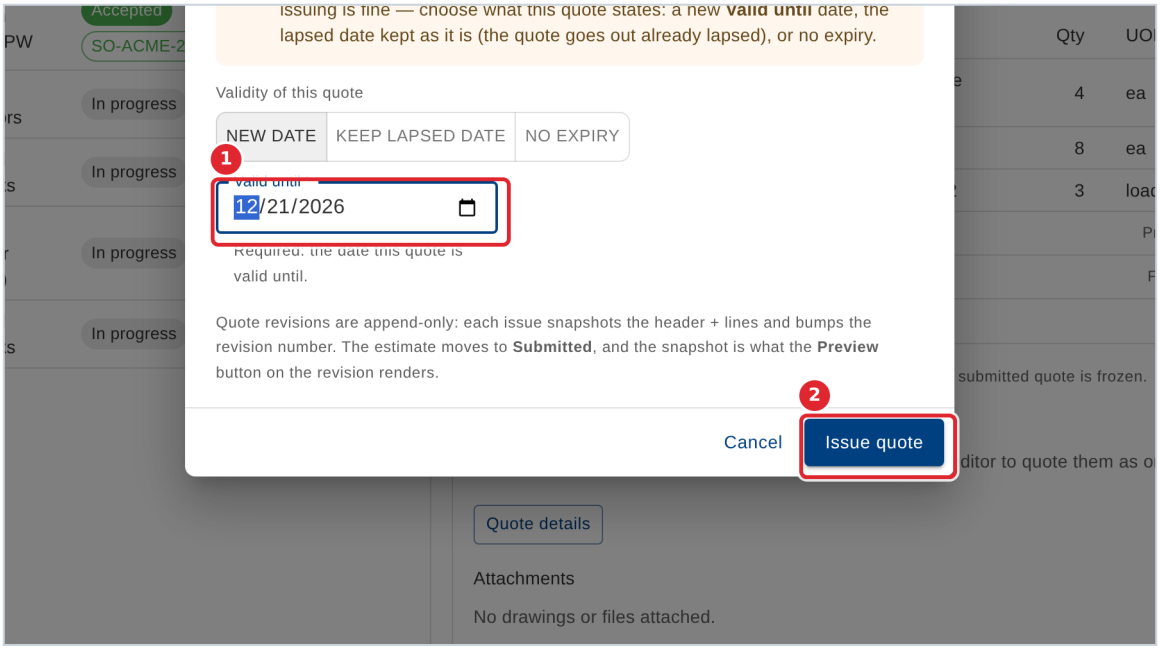
Step 1. Open the estimate and select Issue quote, on the estimate or in the hub header.



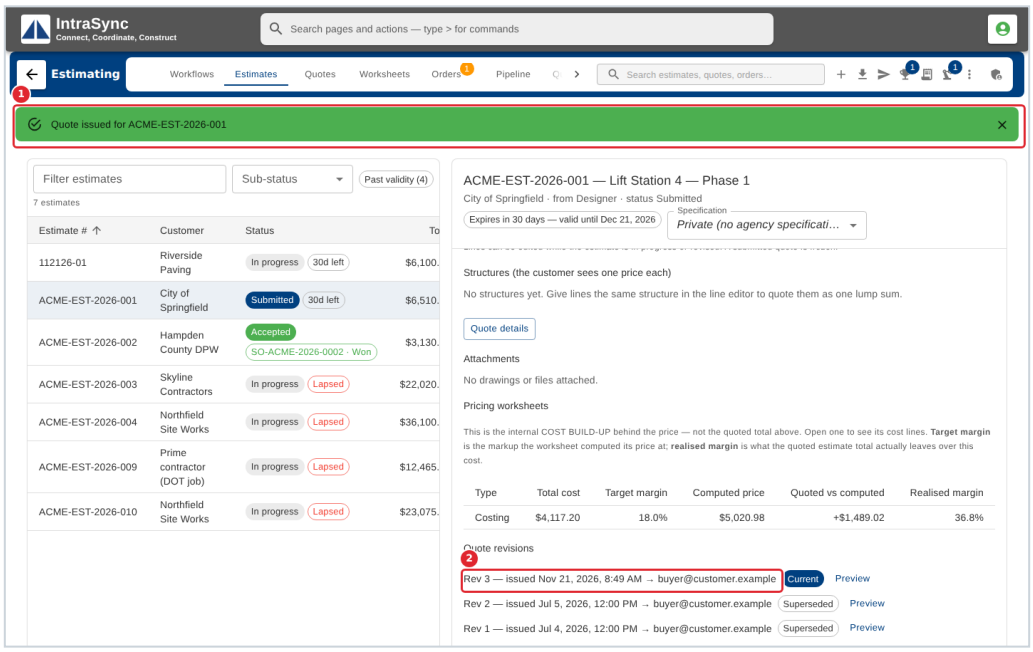
Step 2. Check the estimate, and type the email address the quote is going to in Sent to. It is recorded on the revision.



Step 3. If the estimate's validity has lapsed, choose what this quote states: a New date, the lapsed date kept as it is, or No expiry. The quote is held until you choose.



Step 4. With New date, enter the Valid until date, then select Issue quote.



Step 5. A message confirms the quote was issued. The new revision is added to Quote revisions, and the estimate moves to Submitted.

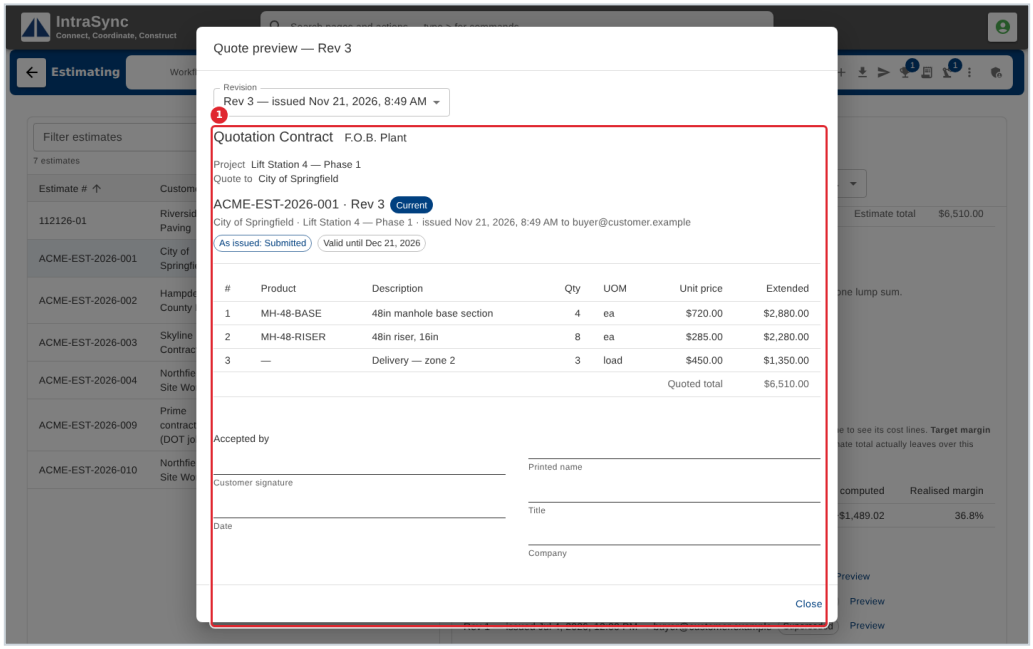
Tips:

- Sent to must look like an email address; it is recorded on the revision for good.
- A Valid until date already in the past is allowed, but the dialog warns that the quote would go out already lapsed.
- Each issue adds a revision and moves the estimate to Submitted. Earlier revisions are never changed.

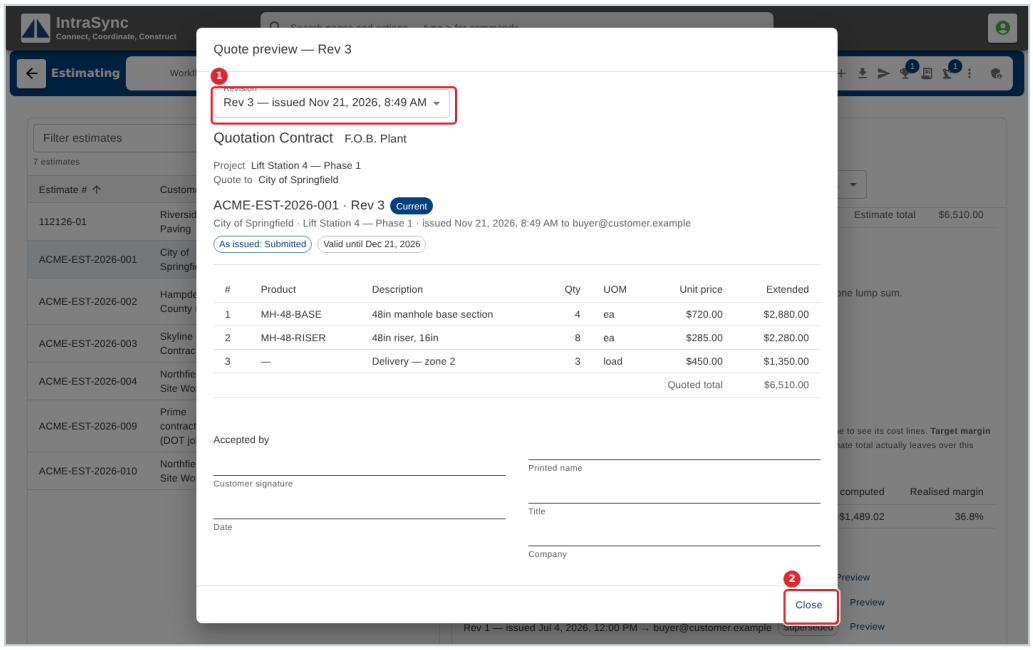
This is shown in the Estimating video at 0:27.

14. Preview a quote as the customer received it

See the quote document exactly as it was issued, for a customer question or before you re-issue.



Step 1. Select Preview beside a revision. The quote document opens as it stood when it was issued, not as the estimate stands today.



Step 2. When the estimate has more than one revision, choose another one in Revision. Select Close when you are done.

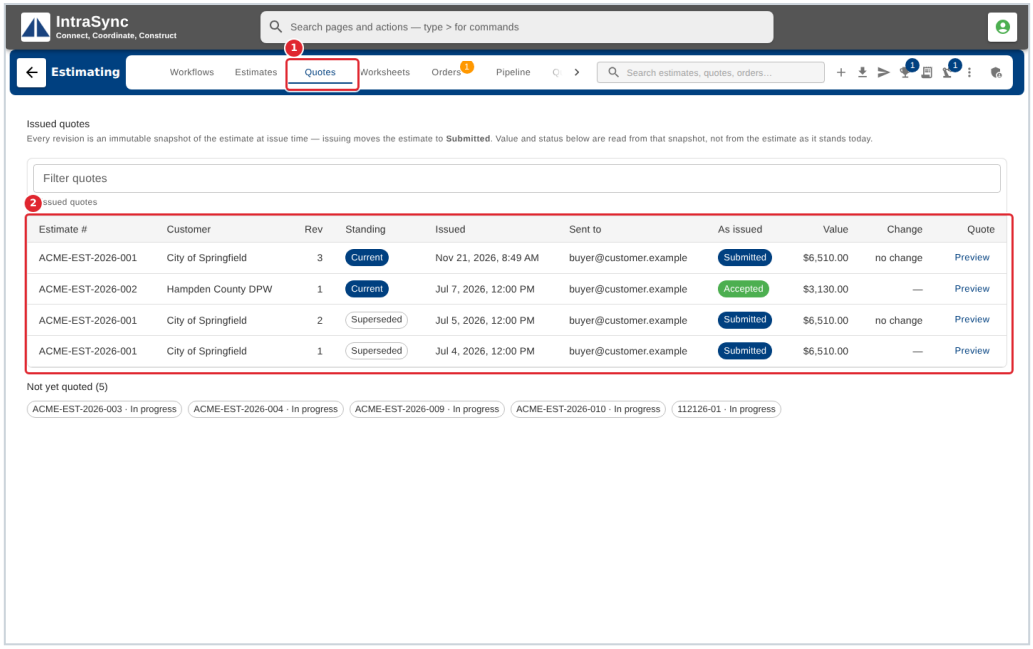
Tips:

- The preview is the record kept with that revision, not the estimate as it stands today. Re-issuing writes a new revision; it never edits an old one.
- When the company prints a quotation contract, the preview shows its heading, terms and the acceptance block for the customer's signature.
- A structure quoted as a lump sum shows as one priced line, with its pieces listed without prices.

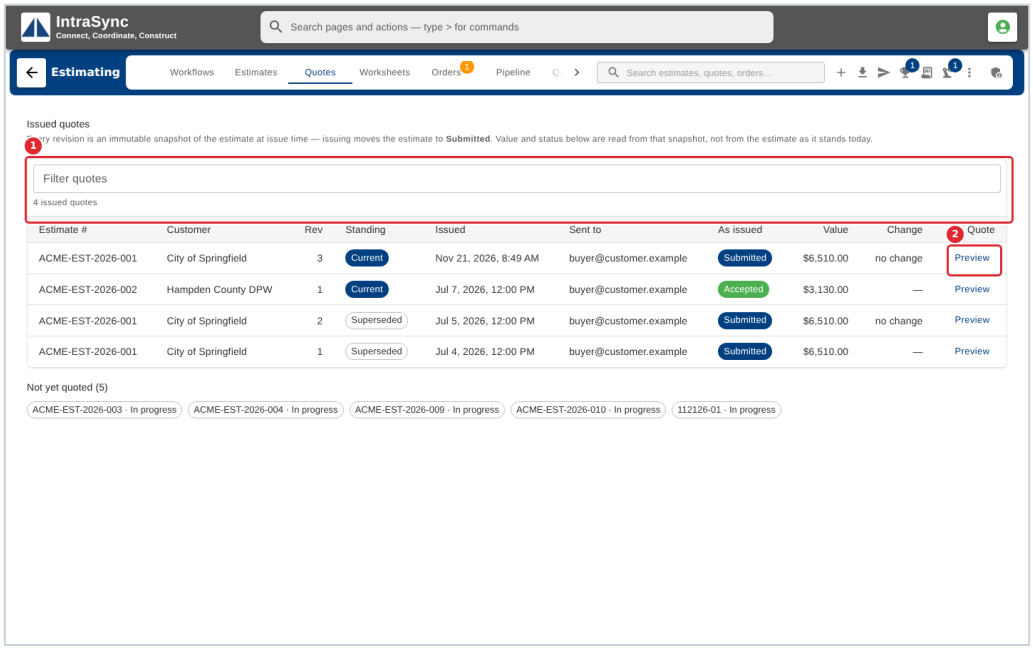
This is shown in the Estimating video at 0:36.

15. Review every quote you have issued

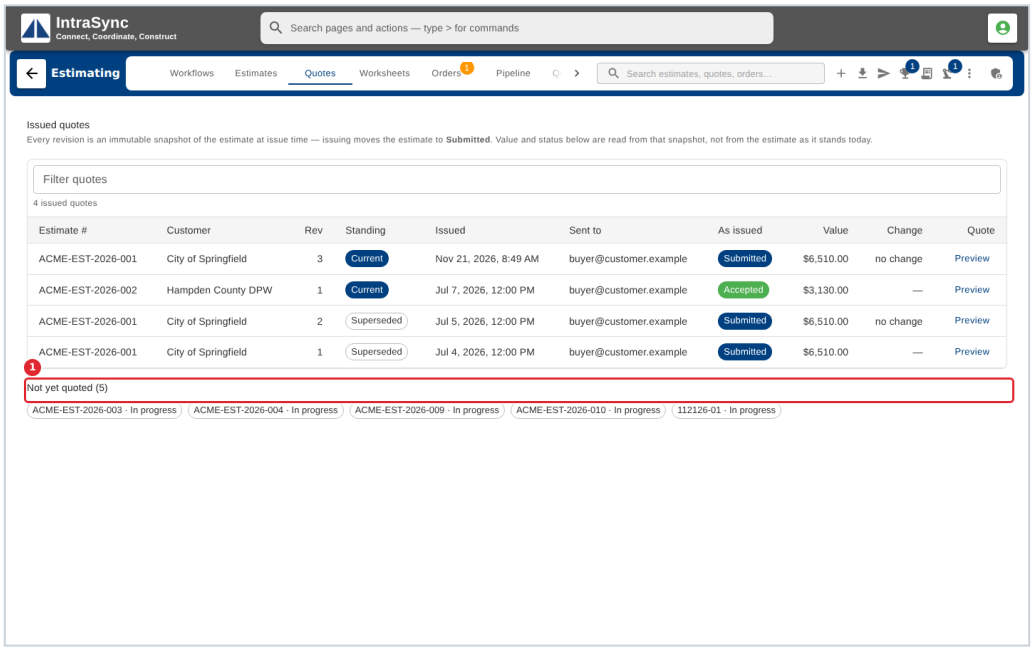
Look across all issued quotes: who each went to, its value as issued, and how it changed from the revision before.



Step 1. Select the Quotes tab. Every quote revision ever issued is listed, with who it was sent to, its value as issued and the change from the revision before.



Step 2. Filter the list by estimate number, customer or recipient. Select Preview to see a revision, or select a row to open its estimate.



Step 3. Not yet quoted lists the estimates that have never had a quote issued. Select one to open it.

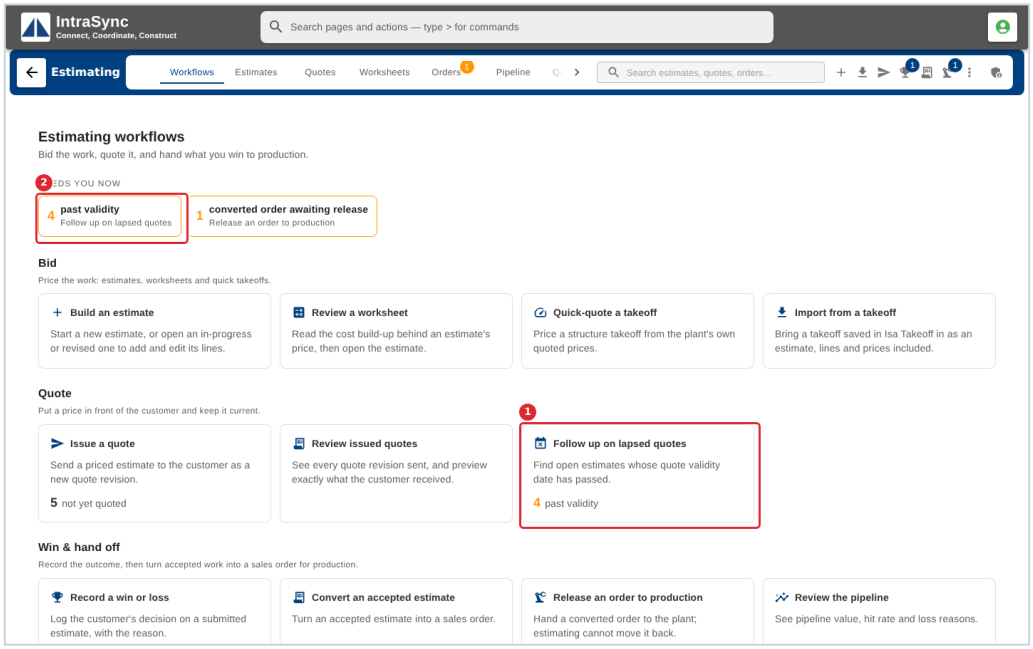
Tips:

– Current marks the newest revision of each estimate; Superseded marks the ones it replaced.

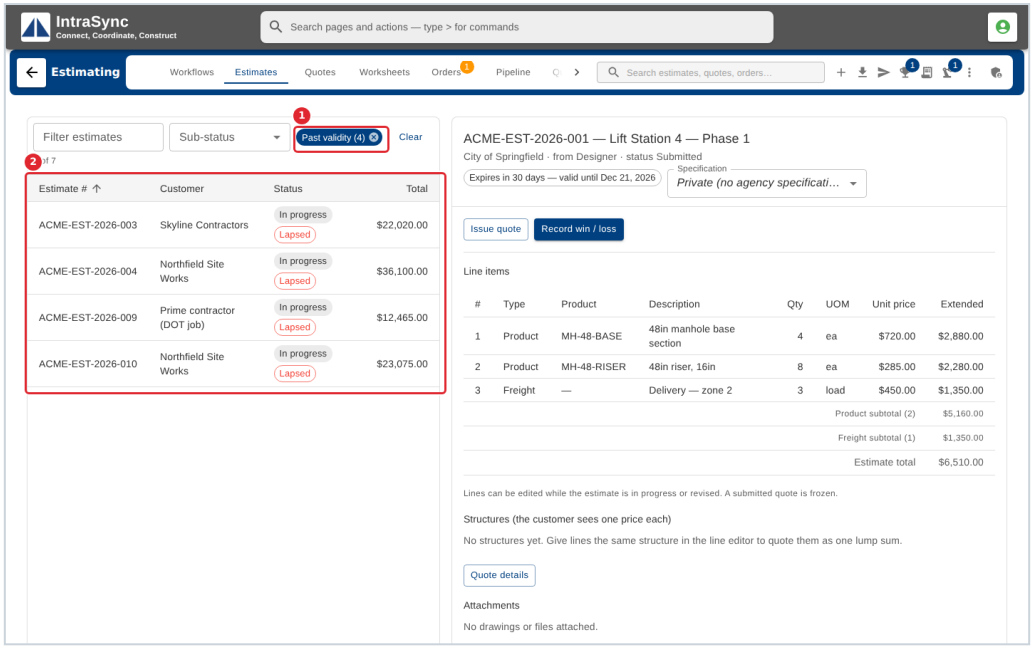
This is shown in the Estimating video at 0:42.

16. Follow up on lapsed quotes

Find the open estimates whose quote validity has passed, so they can be re-issued or closed out.



Step 1. On the Workflows tab, select Follow up on lapsed quotes, or its chip under Needs you now.



Step 2. The Estimates tab opens with only Past validity on. Open each estimate, then issue a fresh quote with a new date or record the customer's decision.

Tips:

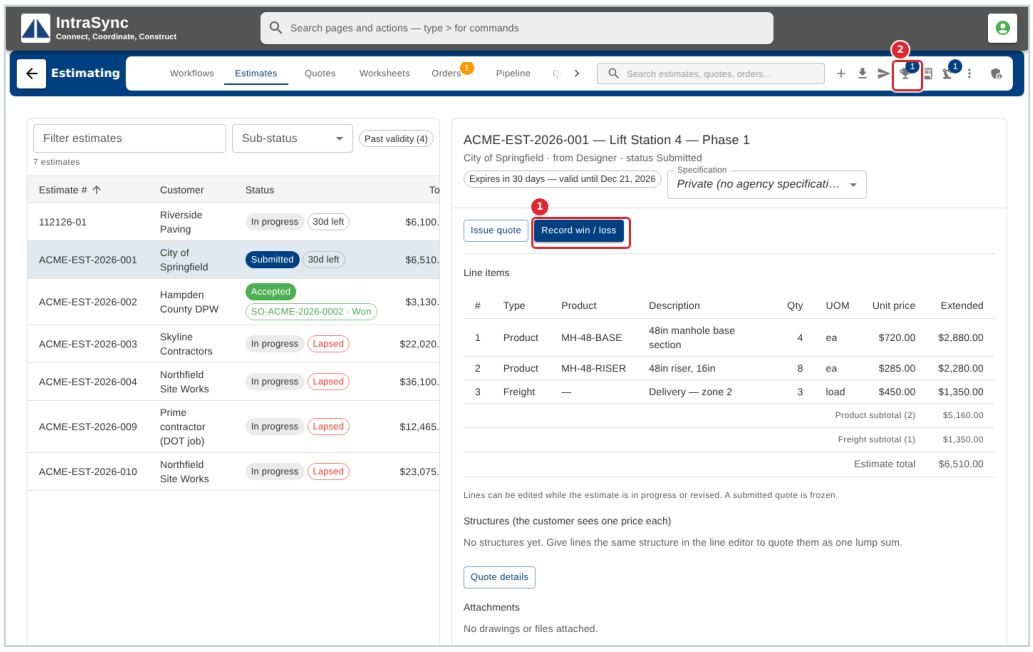
– Re-issuing a lapsed estimate asks you to choose a new date, keep the lapsed date, or issue with no expiry.

17. Record a win, a loss or a no bid

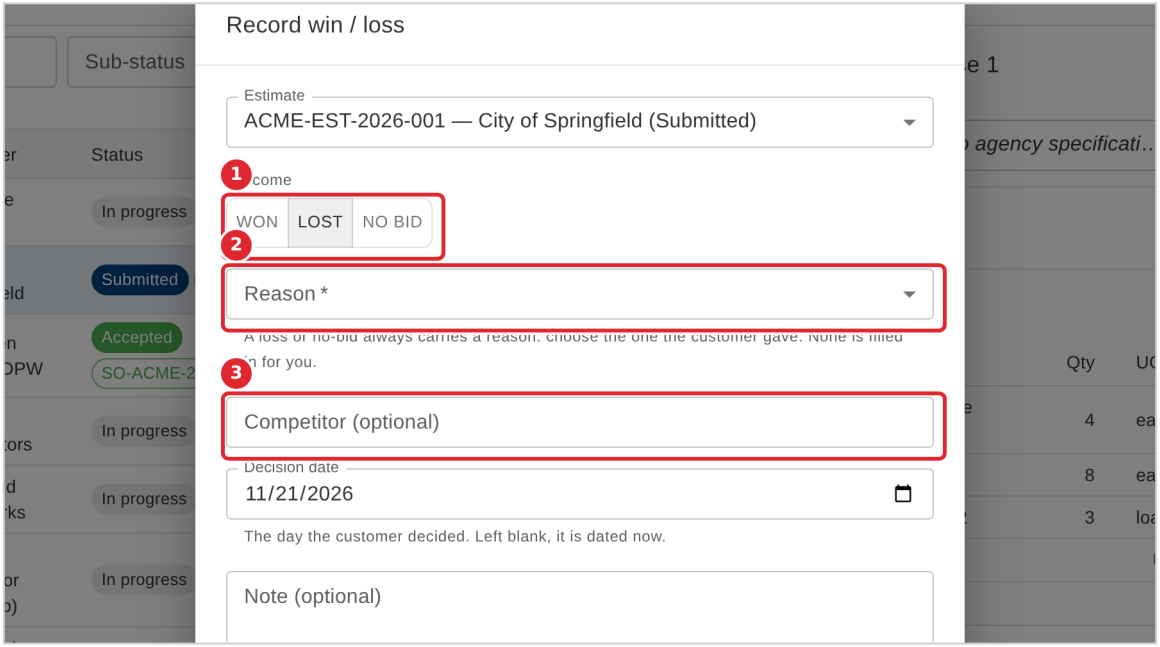
Record the customer's decision on a submitted estimate. A win is what lets the estimate become a sales order.

Before you start:

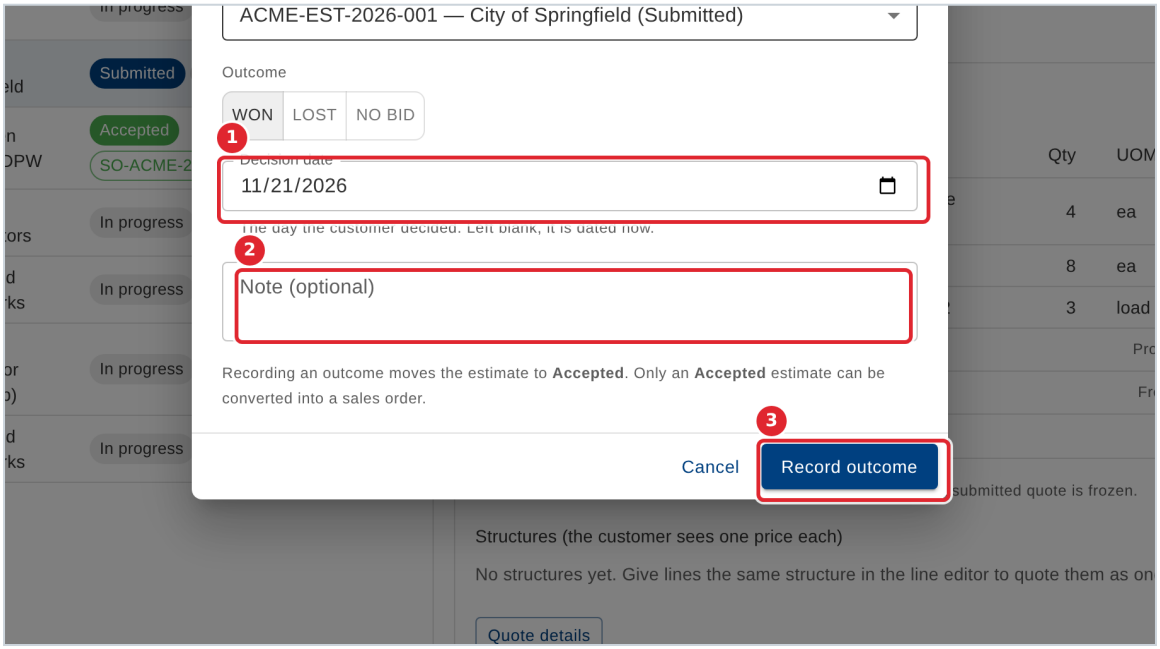
– The estimate must be Submitted or Revised.



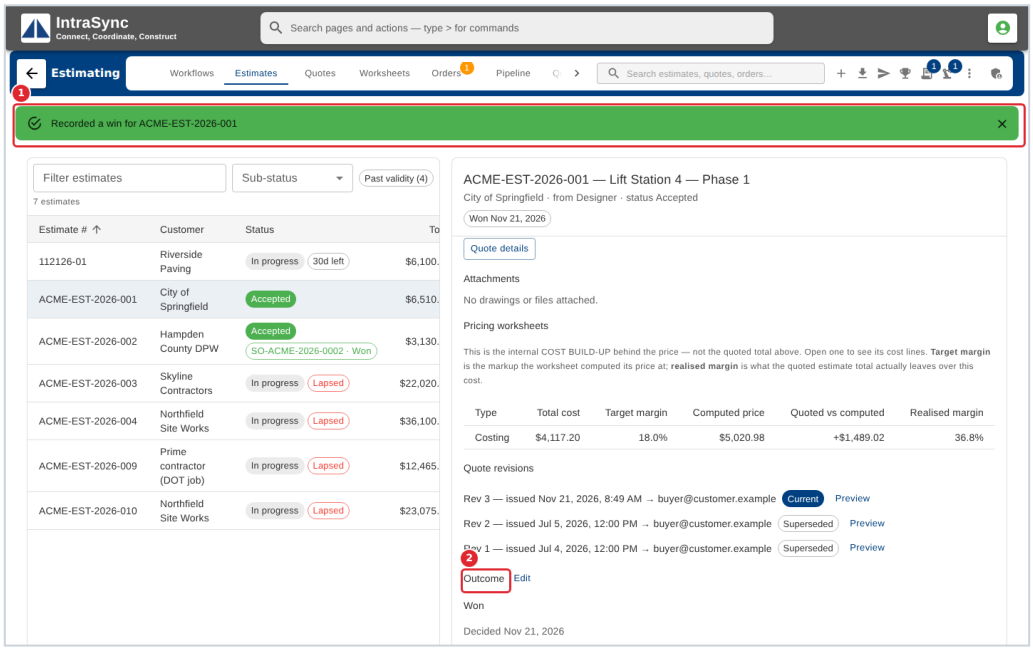
Step 1. When the customer decides, open the estimate and select Record win / loss, on the estimate or in the hub header.



Step 2. Choose the outcome: Won, Lost or No bid. Nothing is chosen for you. For Lost or No bid, choose the reason the customer gave; for Lost you can also name the competitor.



Step 3. Check the Decision date (it starts at today and cannot be in the future), add a note if you like, then select Record outcome.



Step 4. A win moves the estimate to Accepted, which is what lets it become a sales order. The Outcome section on the estimate records the decision.

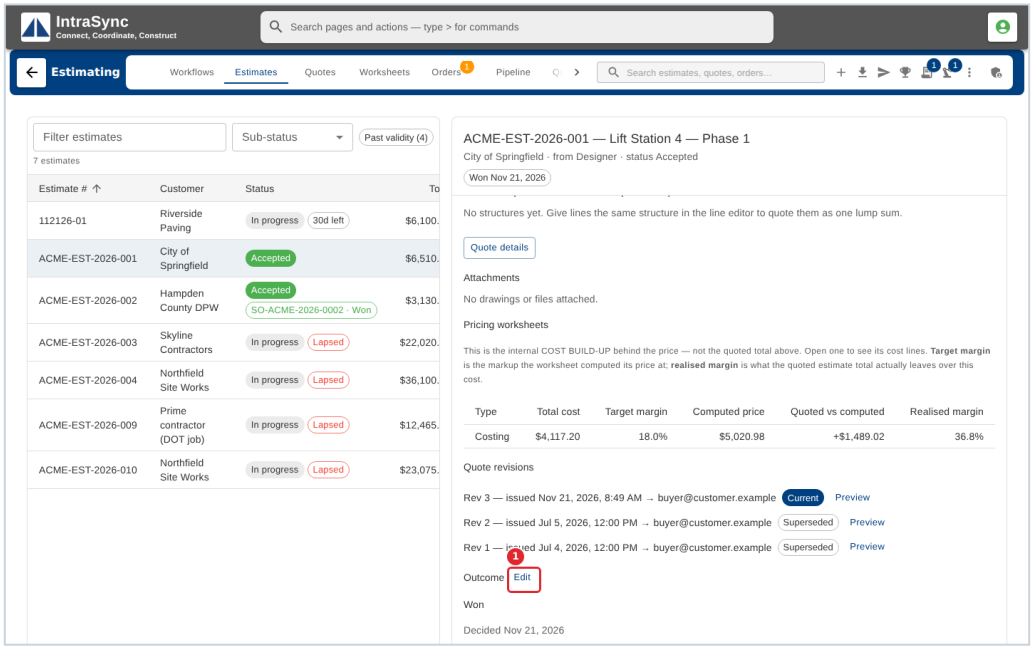
Tips:

- A loss or a no bid always needs a reason; none is filled in for you.
- The decision date cannot be in the future.
- If the estimate's quote has lapsed, the outcome is still recorded. Re-issue the quote first if the customer is accepting new terms.
- Won moves the estimate to Accepted, Lost to Declined, and No bid to No bid.

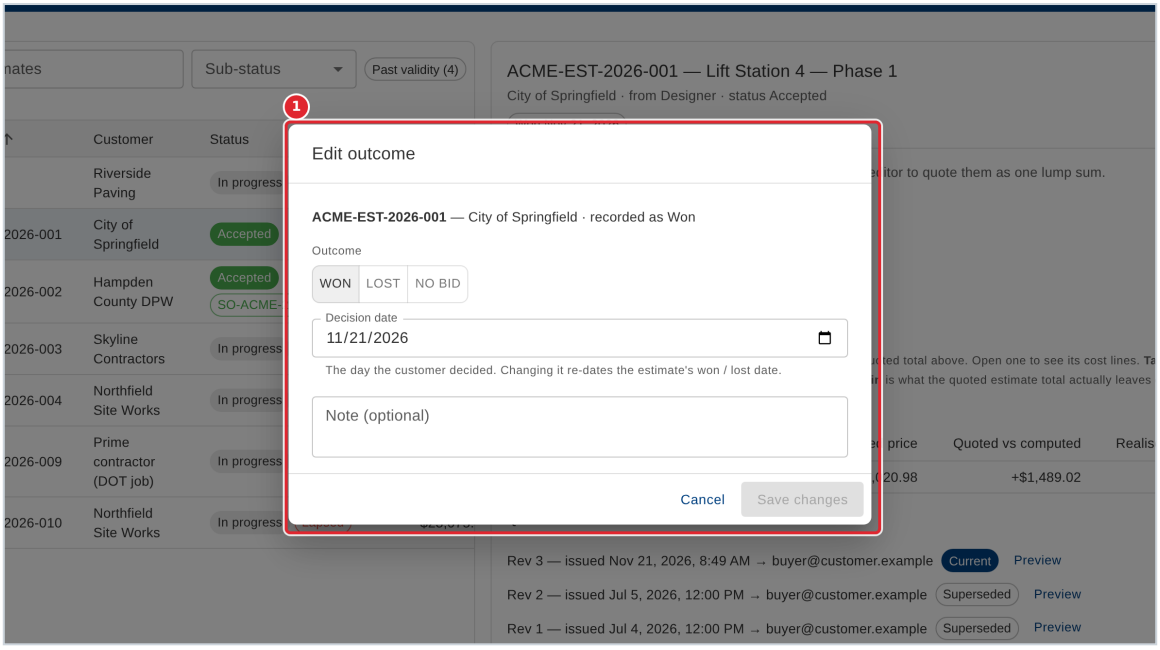
This is shown in the Estimating video at 0:46.

18. Correct a recorded outcome

Fix an outcome that was recorded wrongly, such as the wrong reason or date.



Step 1. To correct a recorded outcome, select Edit in the estimate's Outcome section.



Step 2. Change the outcome, the reason, the competitor, the decision date or the note, then select Save changes. Once the estimate has a sales order, its outcome can no longer be changed here.

Tips:

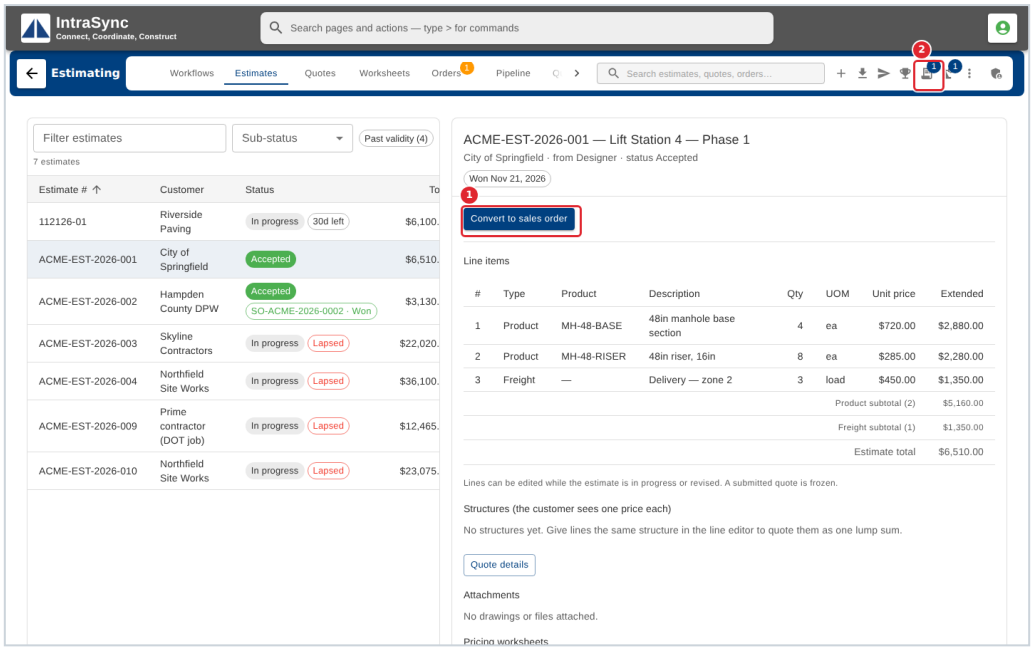
- Save changes stays unavailable until you change something.
- When the estimate's sales order has been closed, its outcome can only be corrected to Lost.

19. Turn an accepted estimate into a sales order

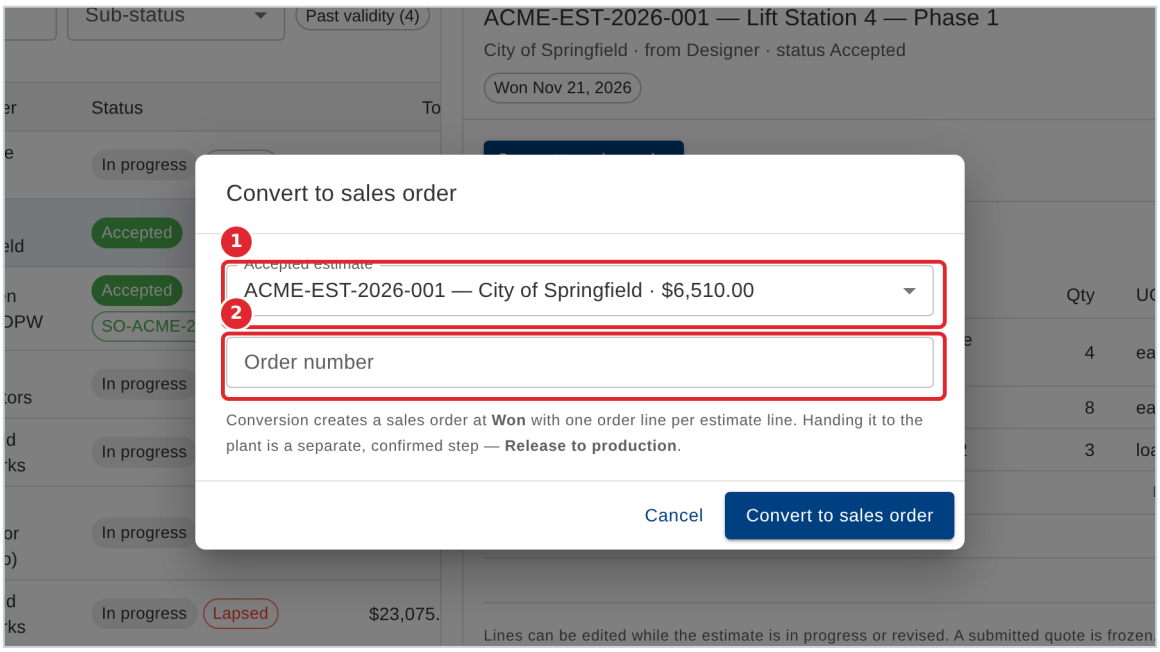
Create the sales order for work the customer accepted.

Before you start:

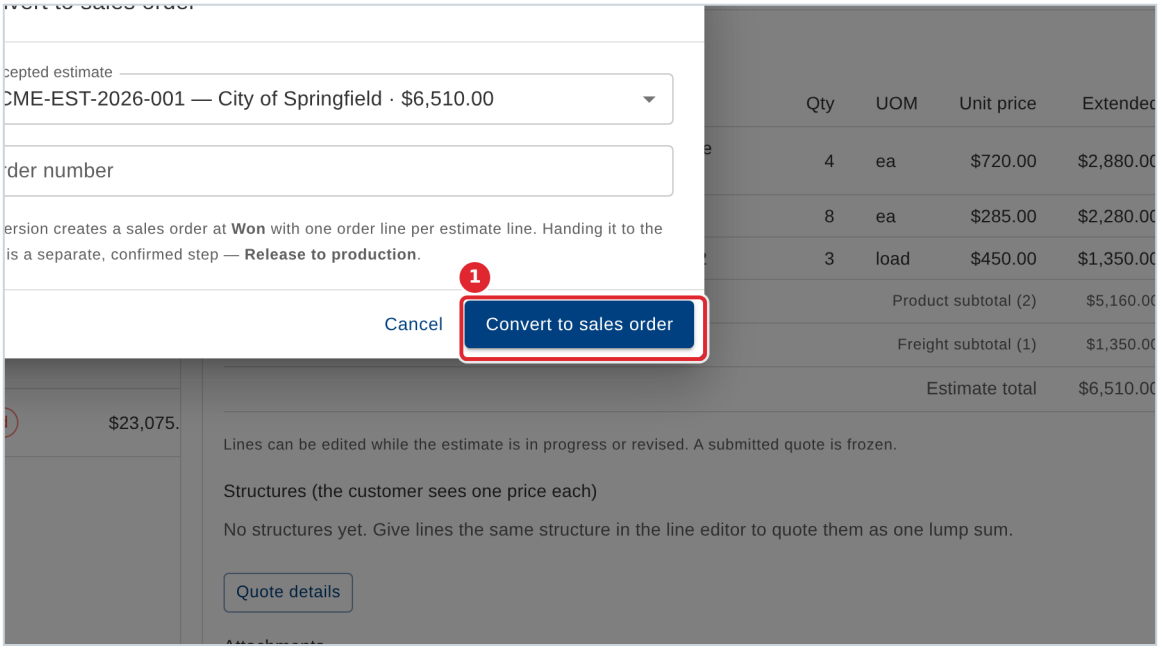
– The estimate must be Accepted (record the win first), with no sales order yet.



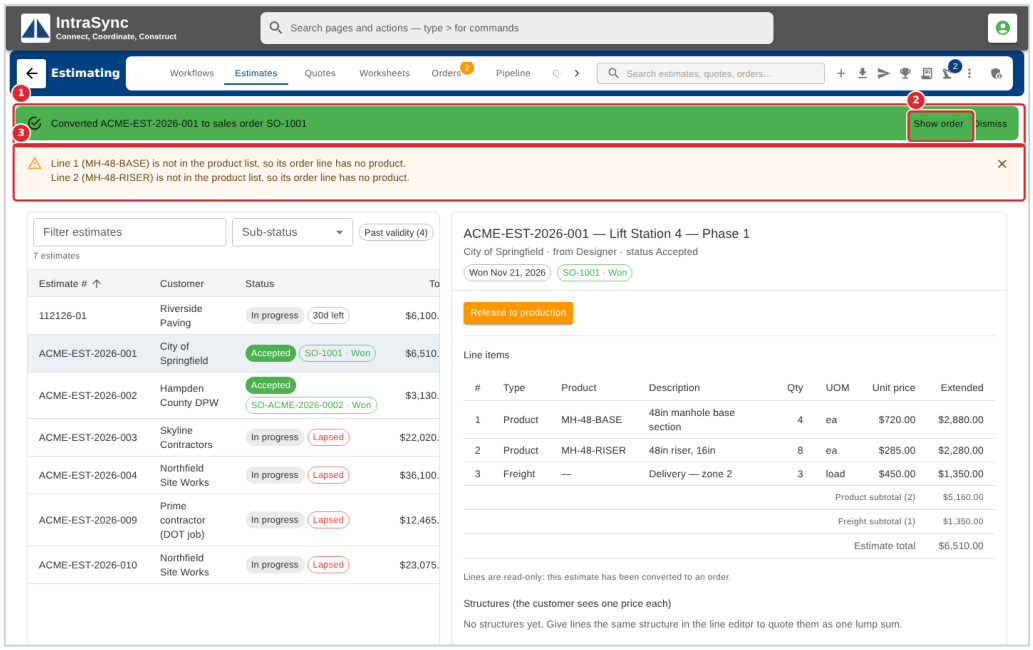
Step 1. Open the accepted estimate and select Convert to sales order, on the estimate or in the hub header.



Step 2. Check the accepted estimate. Leave Order number blank to take the next order number, or type the number the order should carry.



Step 3. Select Convert to sales order. The order is created at Won, with one order line for each estimate line. Sending it to the plant is a separate step.



Step 4. A message names the new order, with Show order to go to it. Any note about the order lines, such as a product that is not in the product list, is listed in amber underneath.

Tips:

- When order numbers are not given out automatically in your installation, Order number is required.
- When your company's orders are written by another system, there is no order number to enter: the number appears on the estimate once the order exists.
- A line whose product is not in the product list still becomes an order line, without a product. The message after conversion lists those lines.

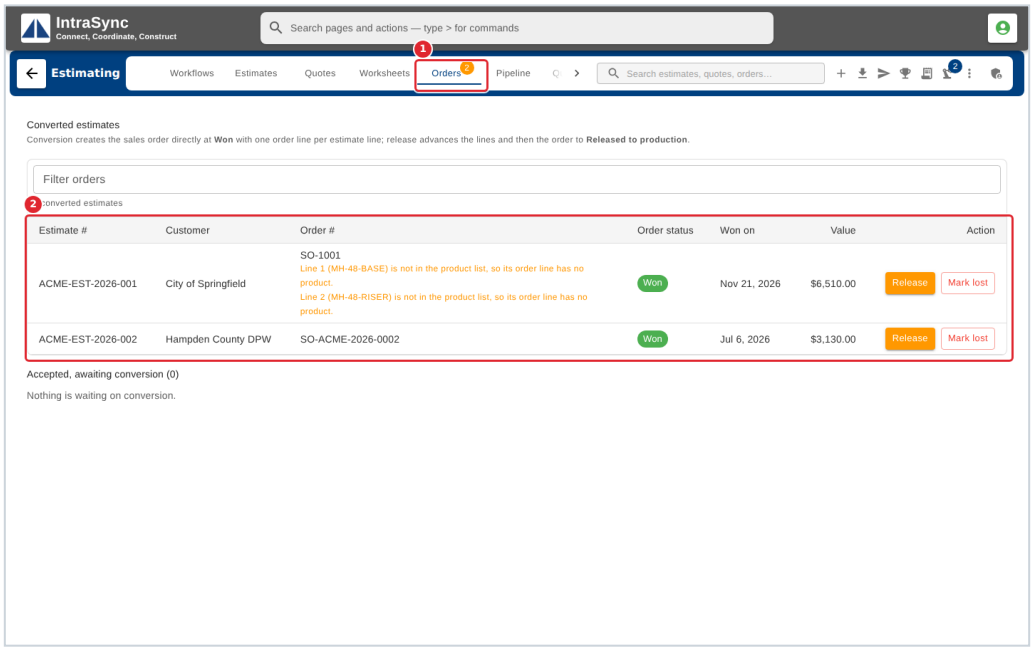
This is shown in the Estimating video at 0:55.

20. Release an order to production

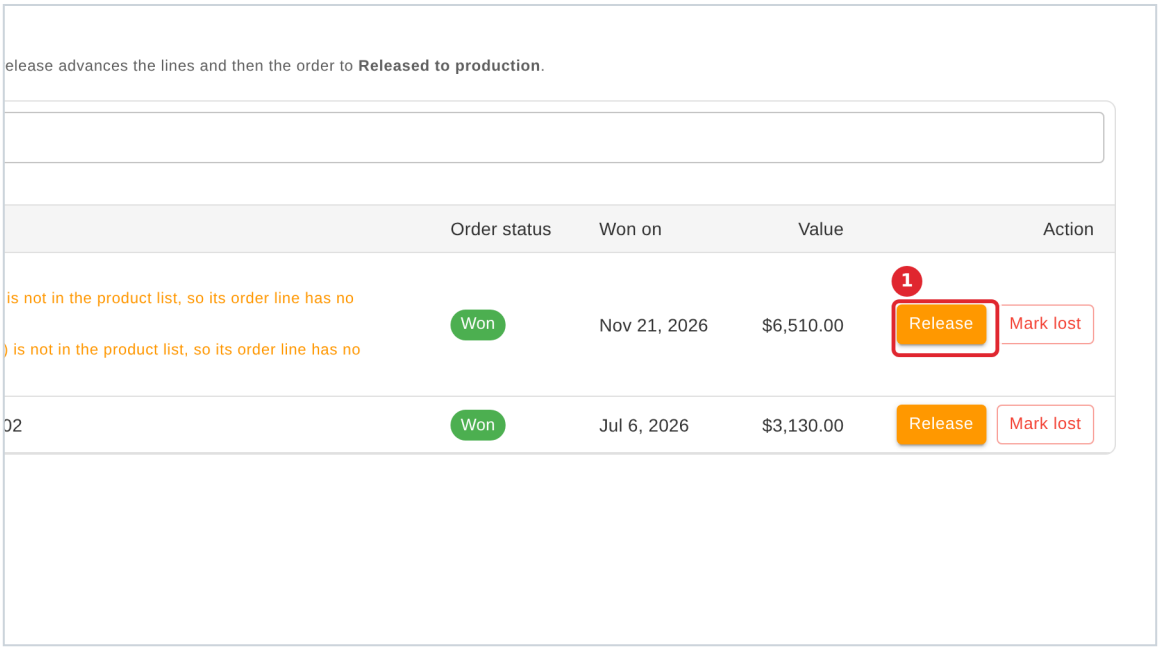
Hand a converted order to the plant.

Before you start:

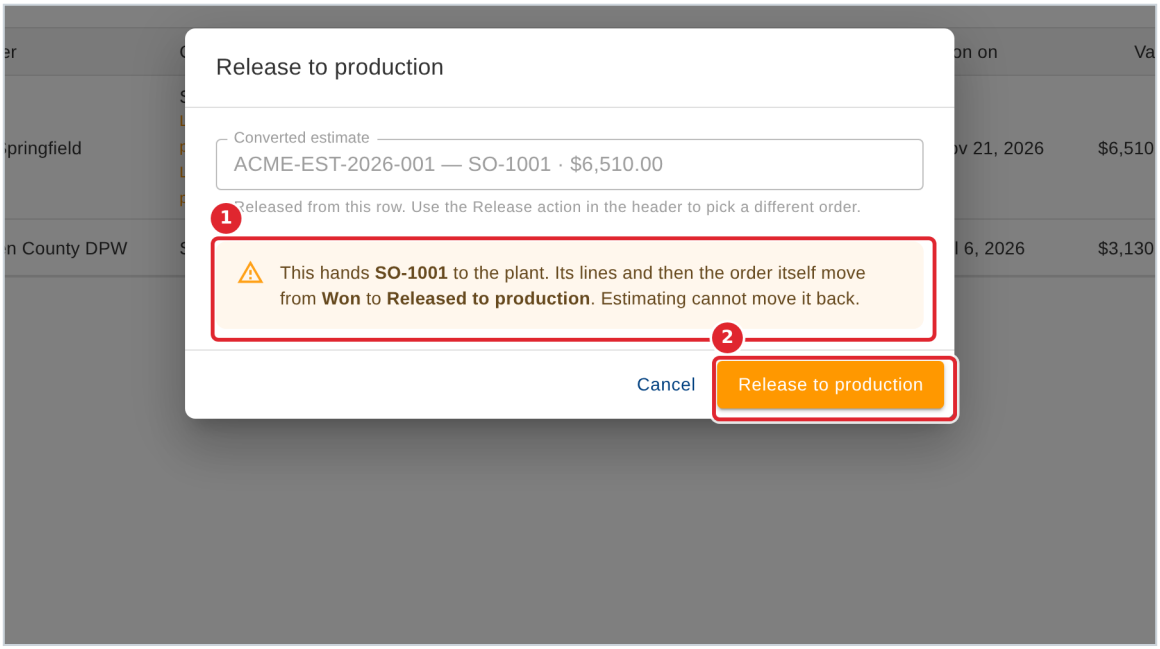
- The order must be at Won, and sales orders must be answering.



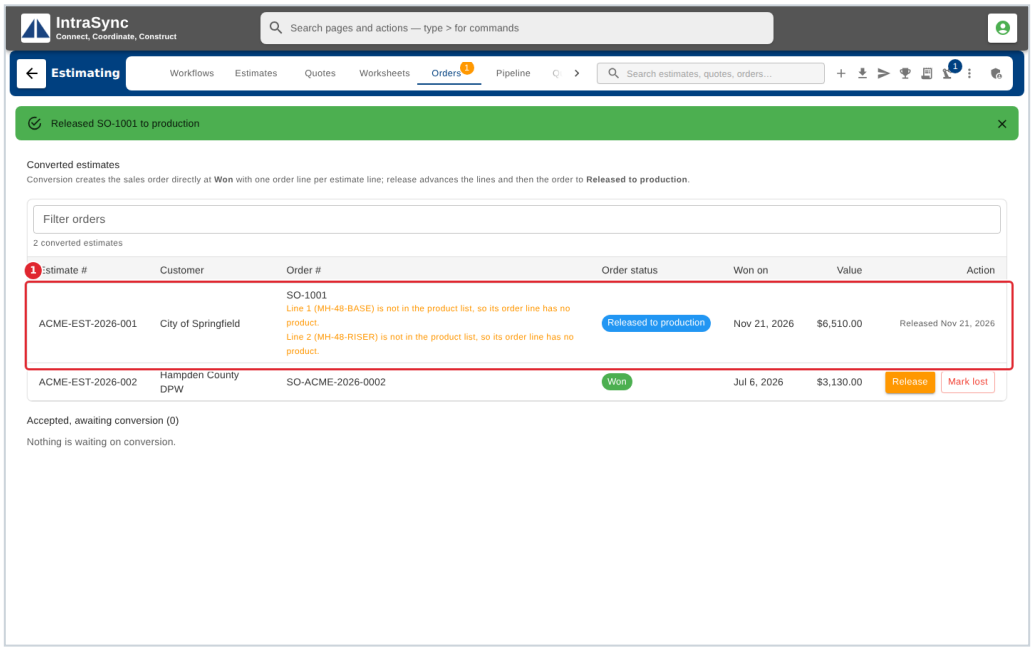
Step 1. Select the Orders tab. Each converted estimate is listed with its order number, the order's status and the date it was won.



Step 2. When the plant should have the order, select Release on its row.



Step 3. Read the confirmation: it names the order, and release cannot be undone from Estimating. Select Release to production to hand it to the plant.



Step 4. The order's status changes to Released to production, and the row says when it was released.

Tips:

- Release cannot be undone from Estimating.
- You can also release from Release to production in the hub header, and choose the order there.
- When your company's orders are written by another system, they are released from the order itself, not from Estimating.

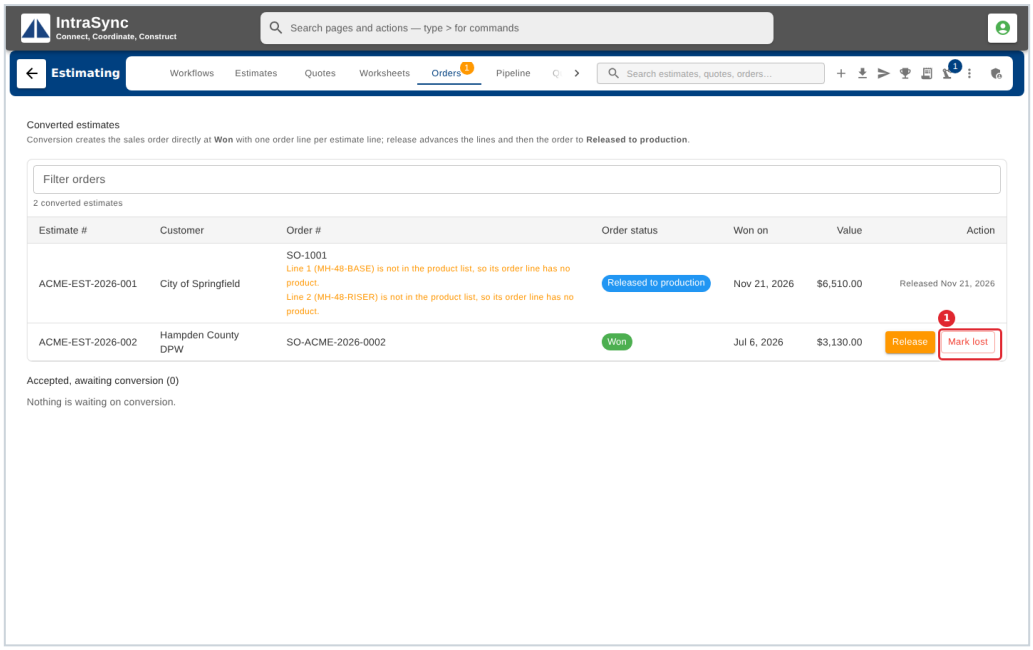
This is shown in the Estimating video at 1:08.

21. Mark a won order lost

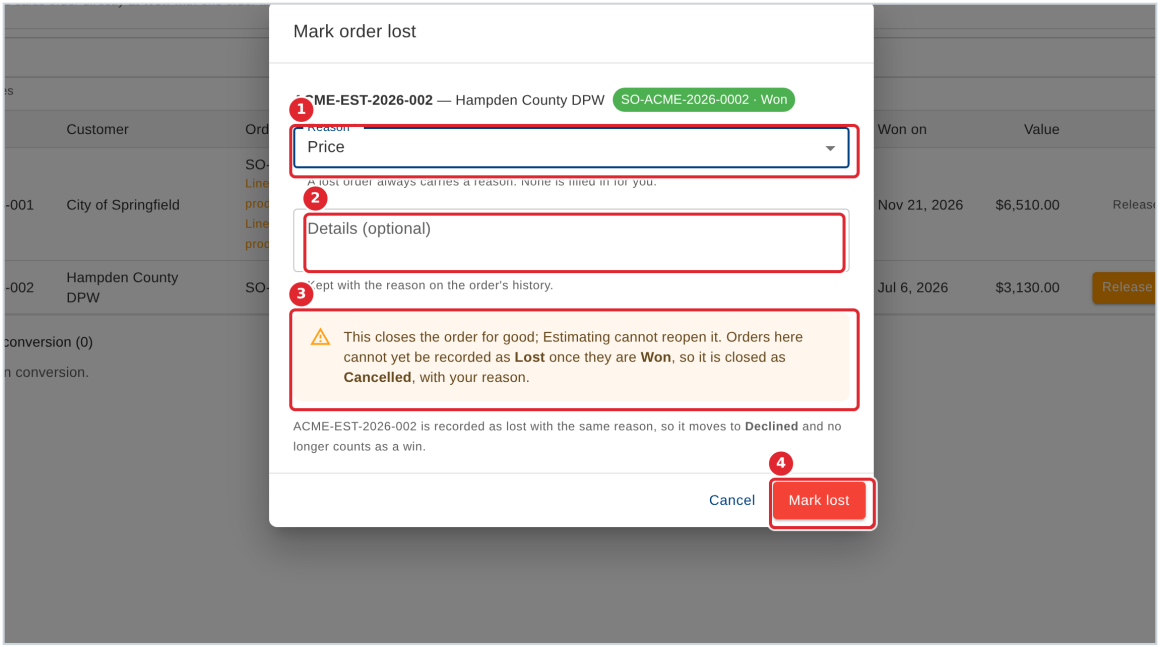
Close a converted order that will not go ahead, and record the loss on its estimate.

Before you start:

– Only a converted order still at Won can be marked lost, while sales orders are answering.



Step 1. If a converted order still at Won will not go ahead, select Mark lost on its row in the Orders tab.



Step 2. Choose the reason and add details if you like. The order is closed for good, and the estimate is recorded as a loss with the same reason. Select Mark lost to confirm, or Cancel.

Tips:

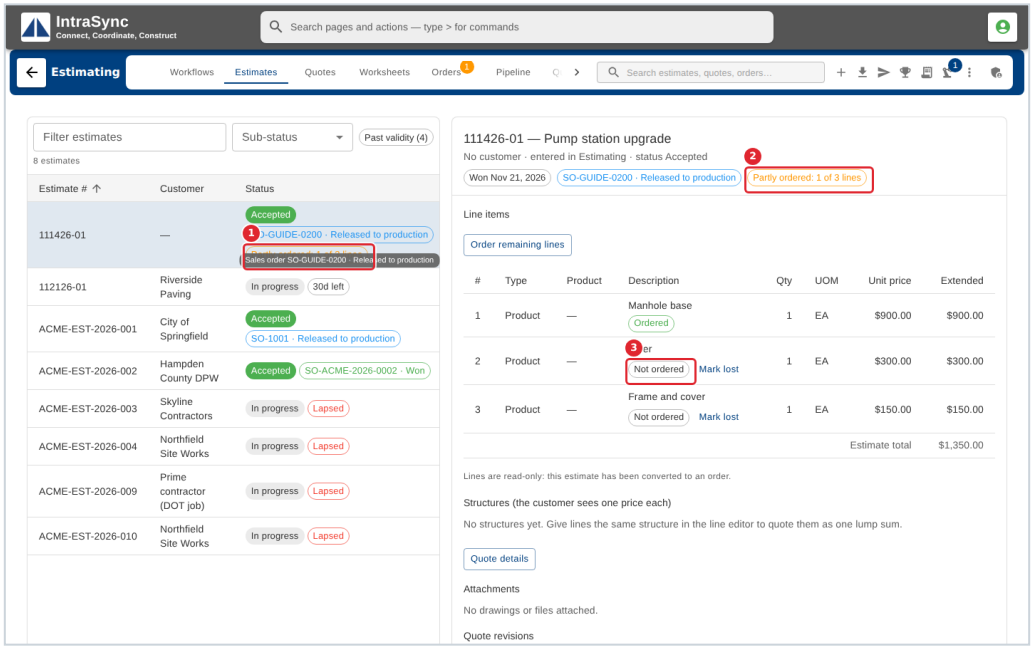
- The order is closed as Cancelled with your reason, and cannot be reopened from Estimating. The estimate moves to Declined and no longer counts as a win.
- A reason is always needed; none is filled in for you.

22. Order the rest of an estimate's lines later

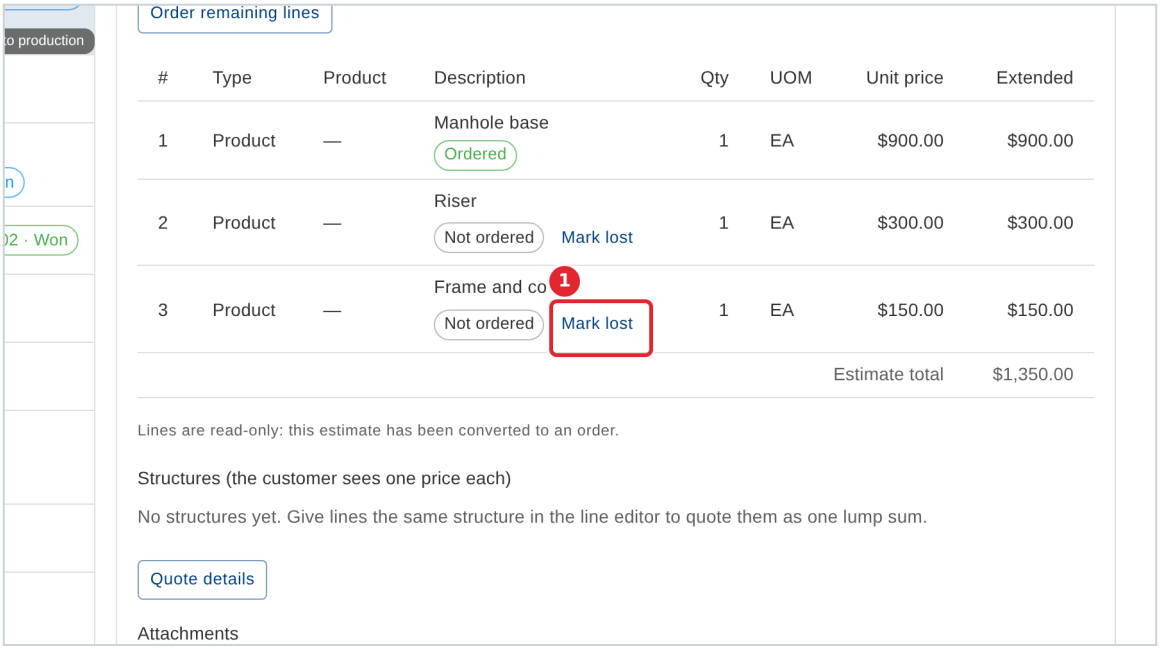
When the customer orders some lines now and the rest later, add the later lines to the same sales order, and record the lines they will never order.

Before you start:

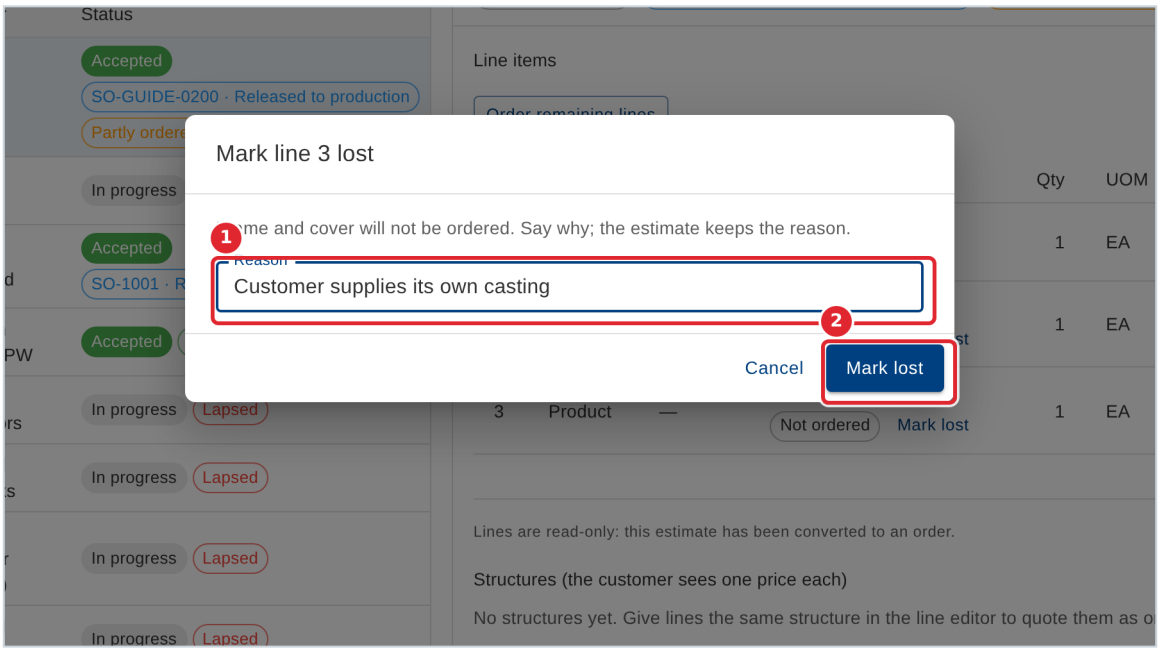
- Your company must have later lines joining the same order turned on.



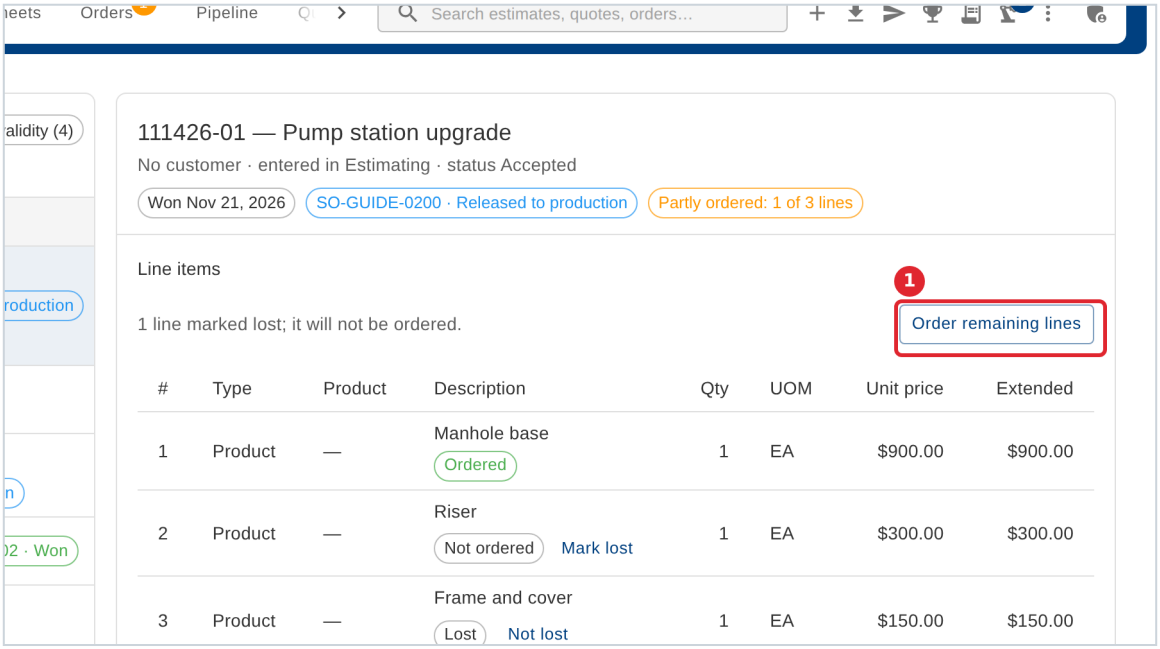
Step 1. When an order took only some of an estimate's lines, the estimate and its row in the list say Partly ordered, and each line says Ordered or Not ordered.



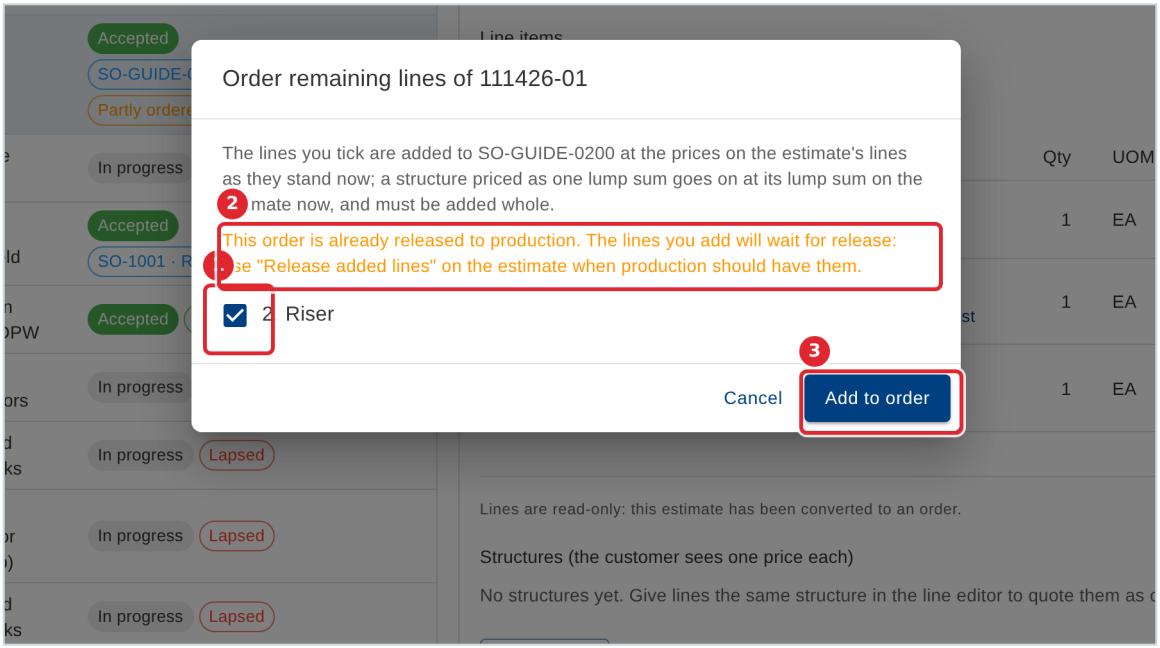
Step 2. If the customer will not order a line, select Mark lost on it.



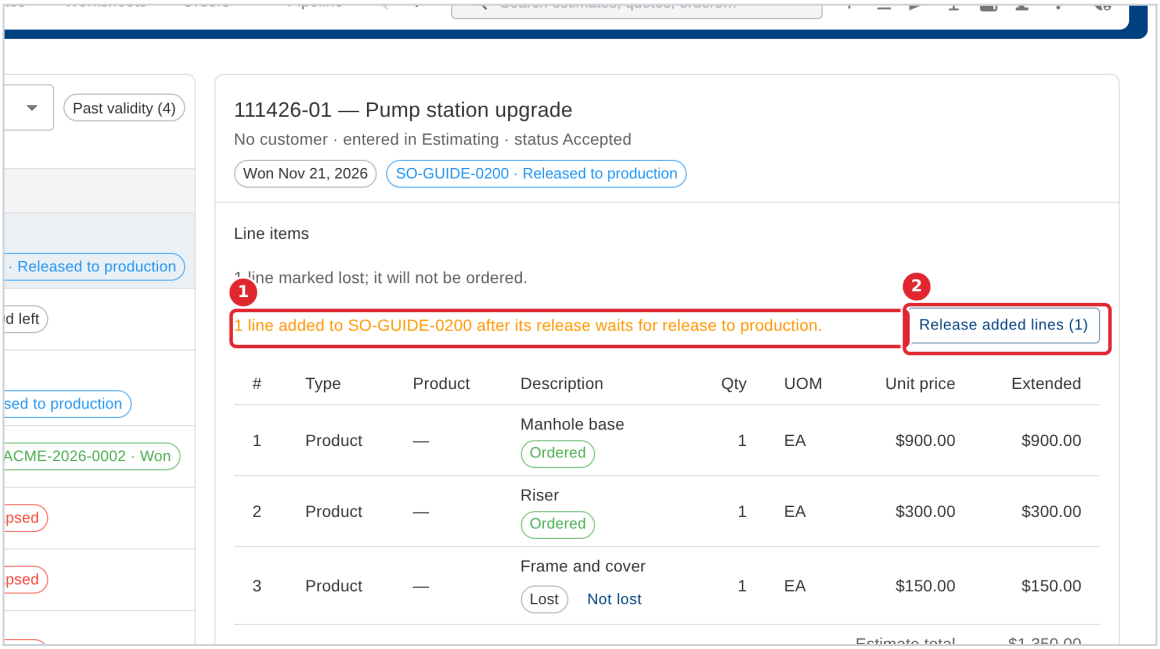
Step 3. Say why in Reason (the estimate keeps it), then select Mark lost. Not lost on the line undoes it.



Step 4. When the customer orders the rest, select Order remaining lines.



Step 5. Tick the lines to add. They join the same sales order at the prices on the estimate as they stand now. If the order is already released, the dialog says the lines will wait for release. Select Add to order.



Step 6. Lines added after the order was released wait until someone releases them. When production should have them, select Release added lines.

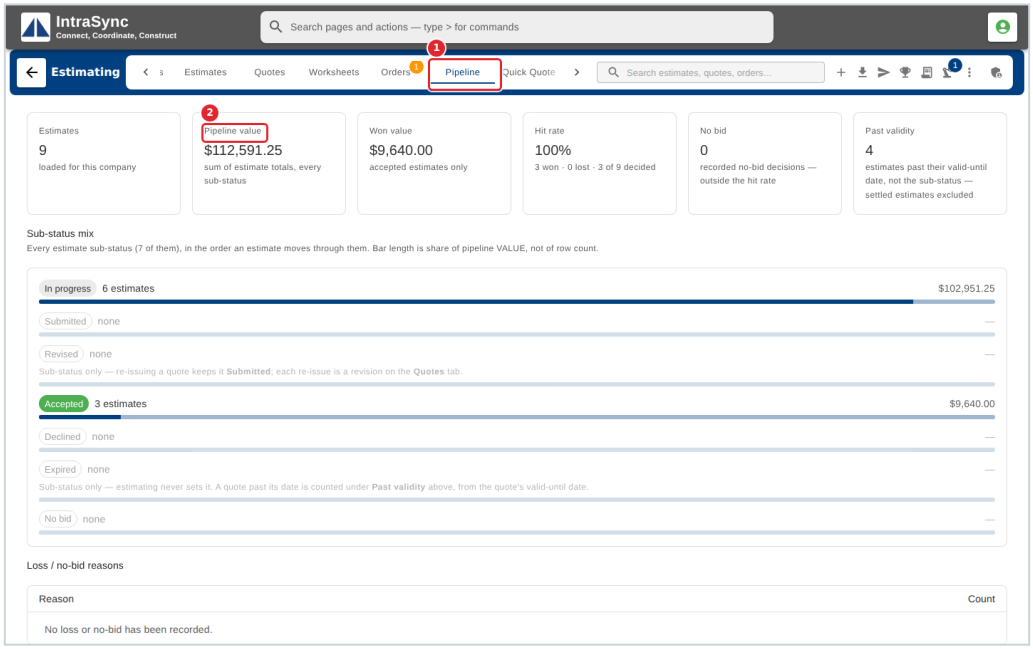
Tips:

- Lines join the order at the prices on the estimate as they stand now. A structure quoted as one lump sum must be added whole.
- When every line is ordered or marked lost, the Partly ordered note goes and the estimate says how many lines were lost.

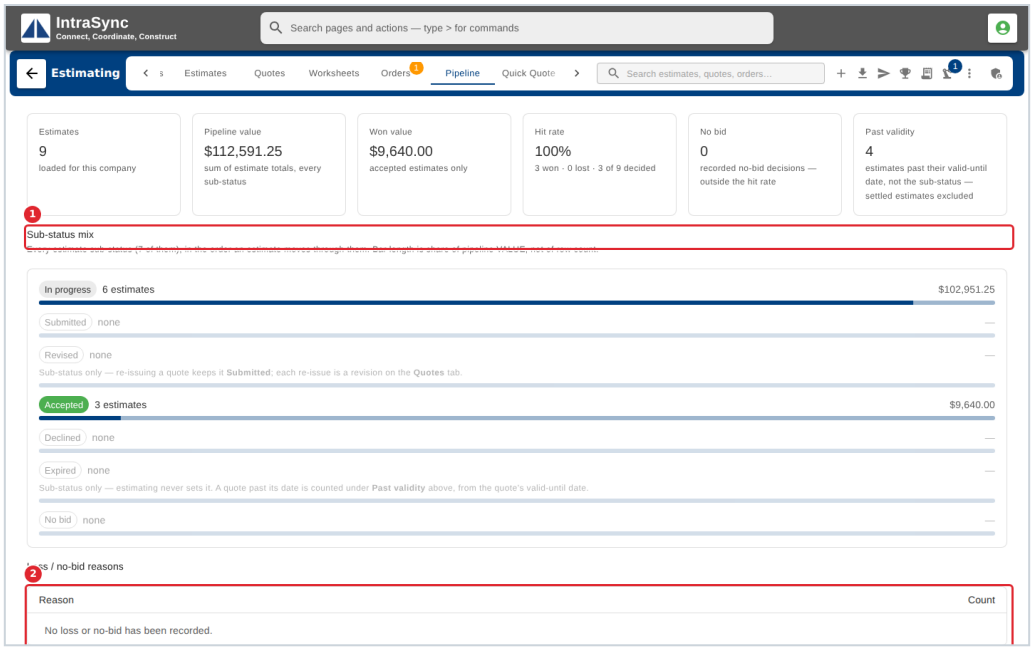
This is shown in the Estimating video at 2:17.

23. Read the pipeline

See the value of the work in hand, how much is won, the hit rate and why work is lost.



Step 1. Select the Pipeline tab. The tiles across the top give the pipeline value, the won value, the hit rate, the no-bids and the estimates past their validity.



Step 2. Sub-status mix shows how many estimates sit at each status and their share of the pipeline's value. Loss / no-bid reasons counts the reasons recorded with each loss.

Tips:

- The hit rate counts wins and losses only. No-bids are shown on their own tile, outside it.
- Estimating never sets Expired itself: a quote past its date is counted under Past validity. Re-issuing a quote keeps the estimate Submitted; each re-issue is a revision on the Quotes tab.
- Amounts in different currencies are shown per currency, never added together.

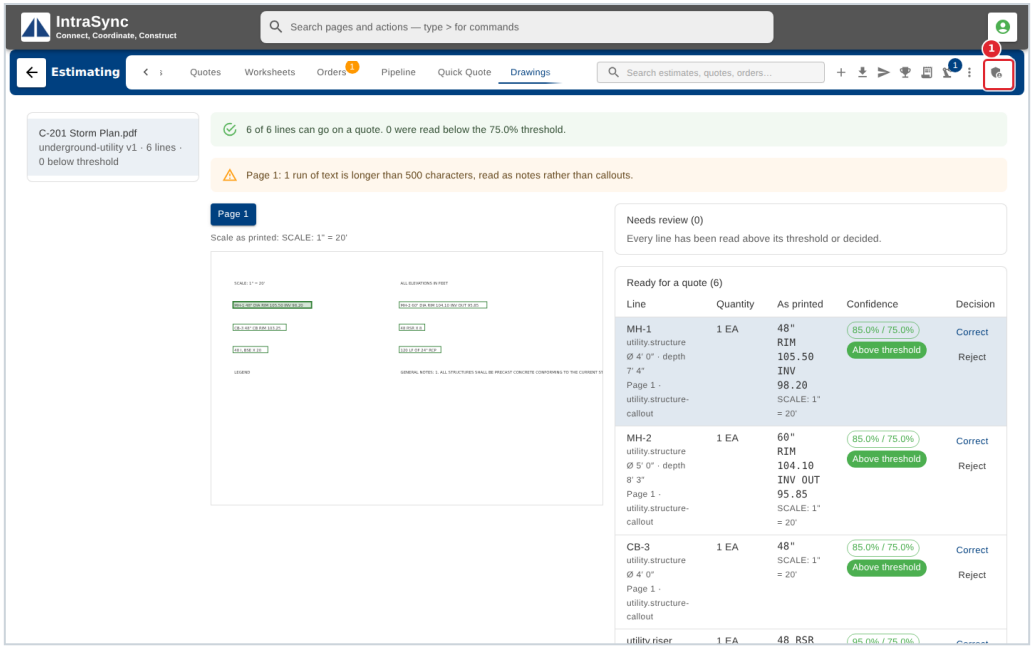
This is shown in the Estimating video at 2:11.

24. Set up rate masters

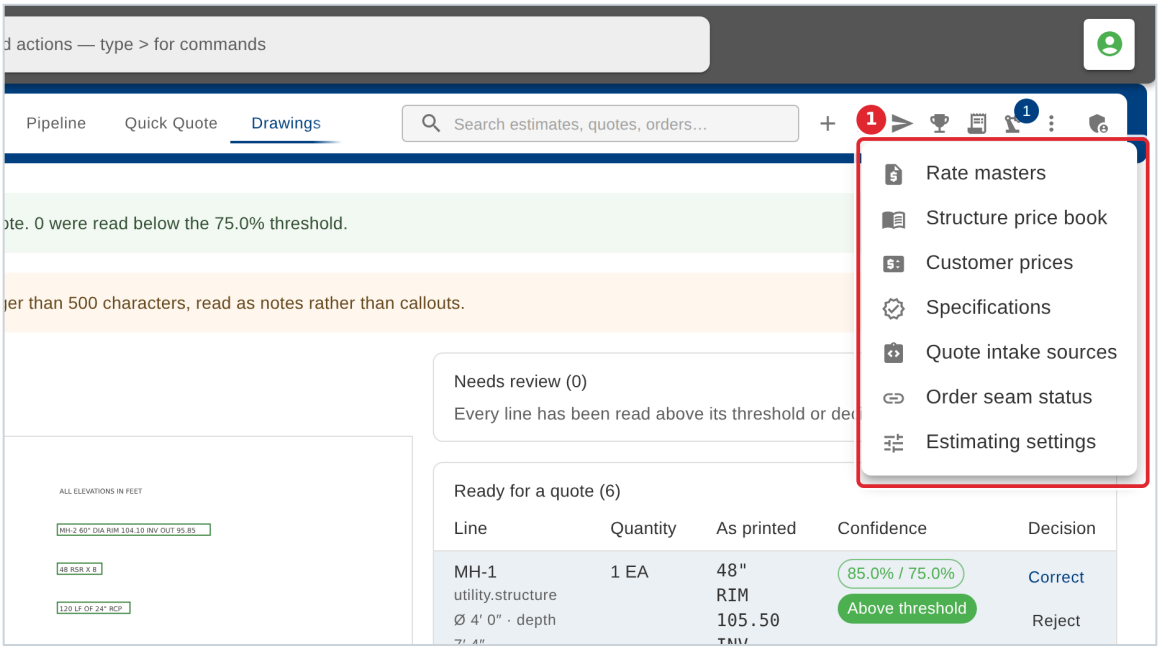
Keep the company rate book that pricing worksheets build their costs from.

Before you start:

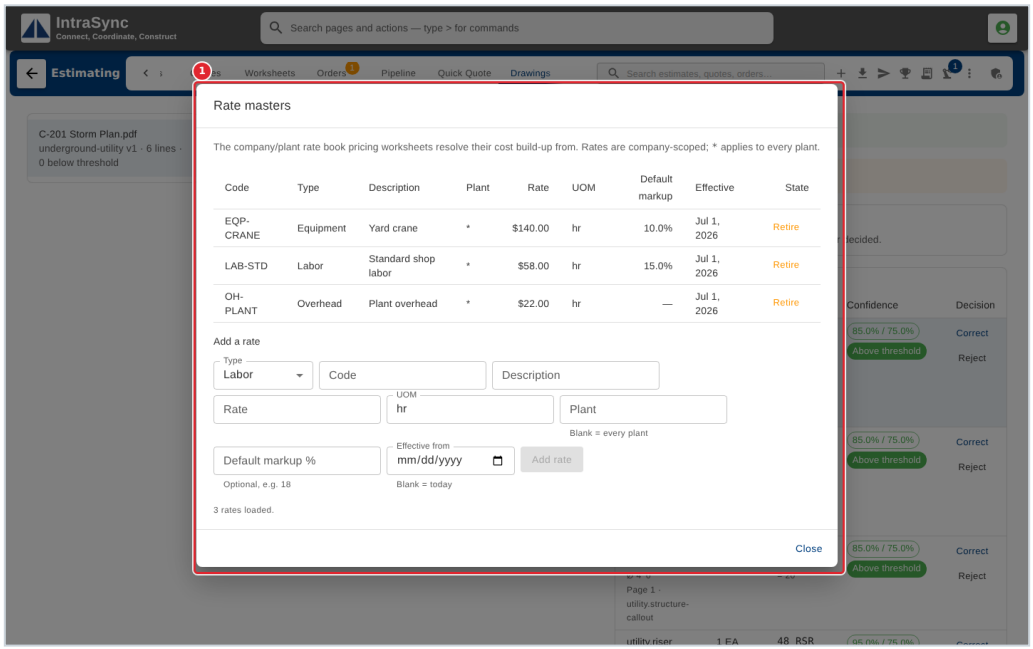
- You must be an Estimating administrator: the Estimating admin button appears only for administrators.



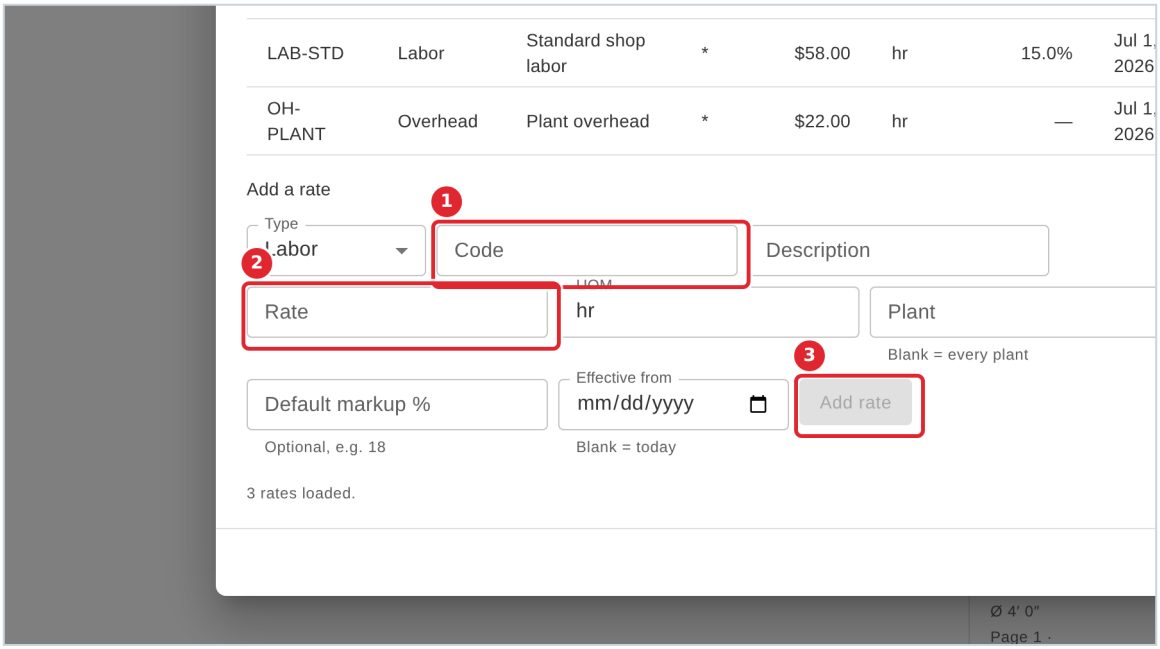
Step 1. Administrators: select Estimating admin, the last button at the right end of the hub header.



Step 2. Its menu holds the company's set-up screens: Rate masters, Structure price book, Customer prices, Specifications, Quote intake sources, Order seam status and Estimating settings.



Step 3. Rate masters is the rate book worksheets take their costs from: labor, equipment, material, overhead and freight rates, each with its unit, plant and default markup.



Step 4. To add a rate, choose the type, then give the code, the rate and its unit. Leave Plant blank for every plant and Effective from blank for today. Select Add rate. Use Retire on a row to stop using a rate, and Re-activate to bring it back.

Tips:

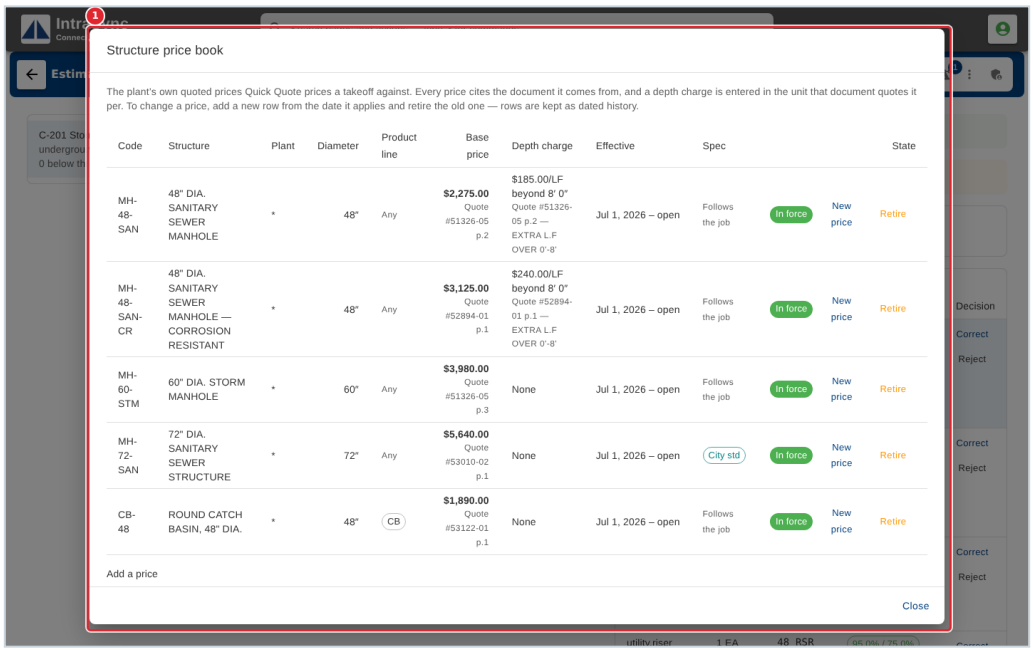
- Code and Rate are required, and Default markup takes a number only.
- Retiring a rate keeps it in the list; Re-activate brings it back.

25. Keep the structure price book

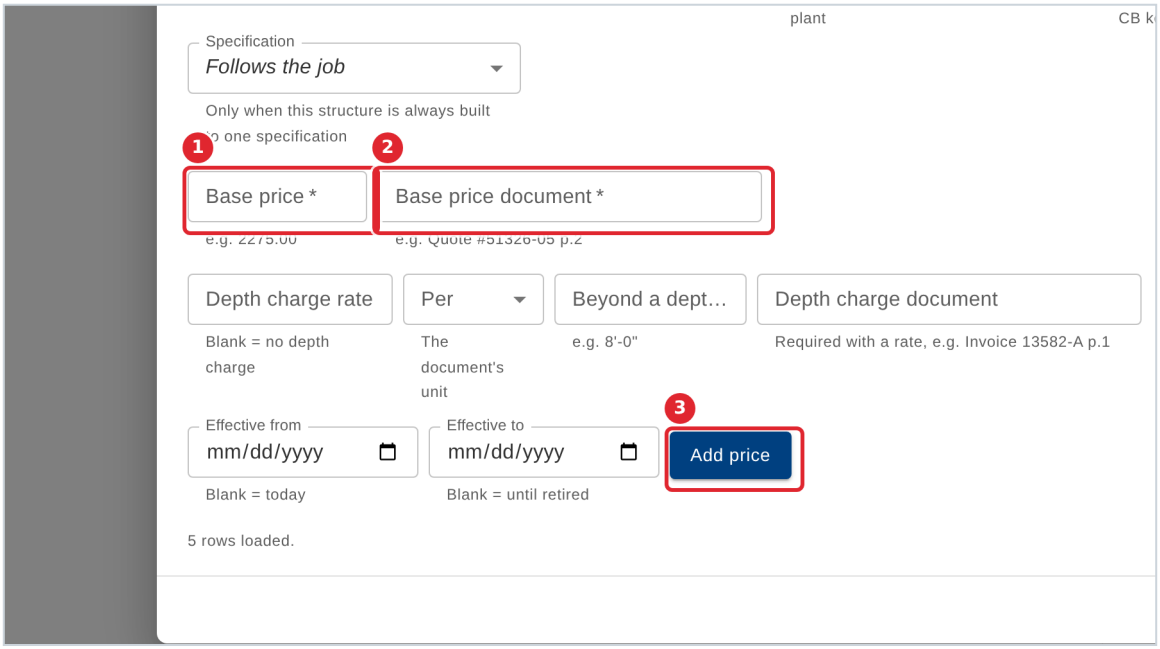
Record the plant's own structure prices, each with the document it comes from, so Quick Quote can price a takeoff.

Before you start:

- You must be an Estimating administrator: the Estimating admin button appears only for administrators.



Step 1. Structure price book holds the plant's own structure prices that Quick Quote prices against. Each price names the document it comes from.



Step 2. To add a price, give the code, the structure as the document words it, the diameter, the base price and the document it comes from. Add a depth charge, its unit and the depth it starts beyond if the document has one. Select Add price.

Tips:

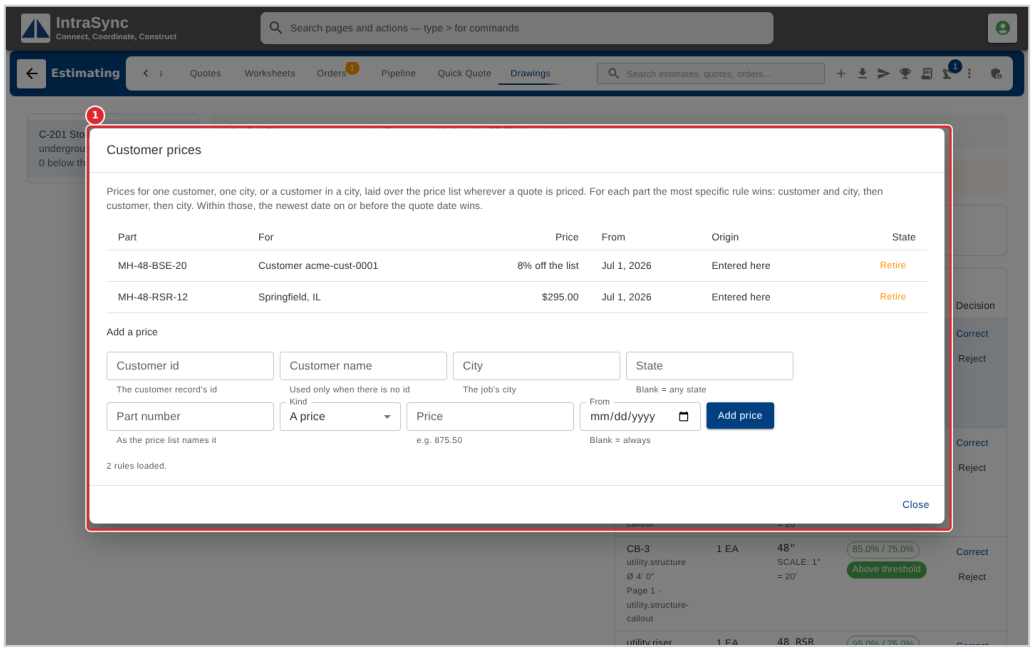
- To change a price, add a new row from the date it applies, then retire the old row. Rows are kept as dated history.
- Every price and every depth charge must name its document.
- If two rows for the same code are in force at the same plant on the same dates, the screen warns you: both would be offered on a takeoff.
- New price on a row fills the form from that row.

26. Set customer and city prices

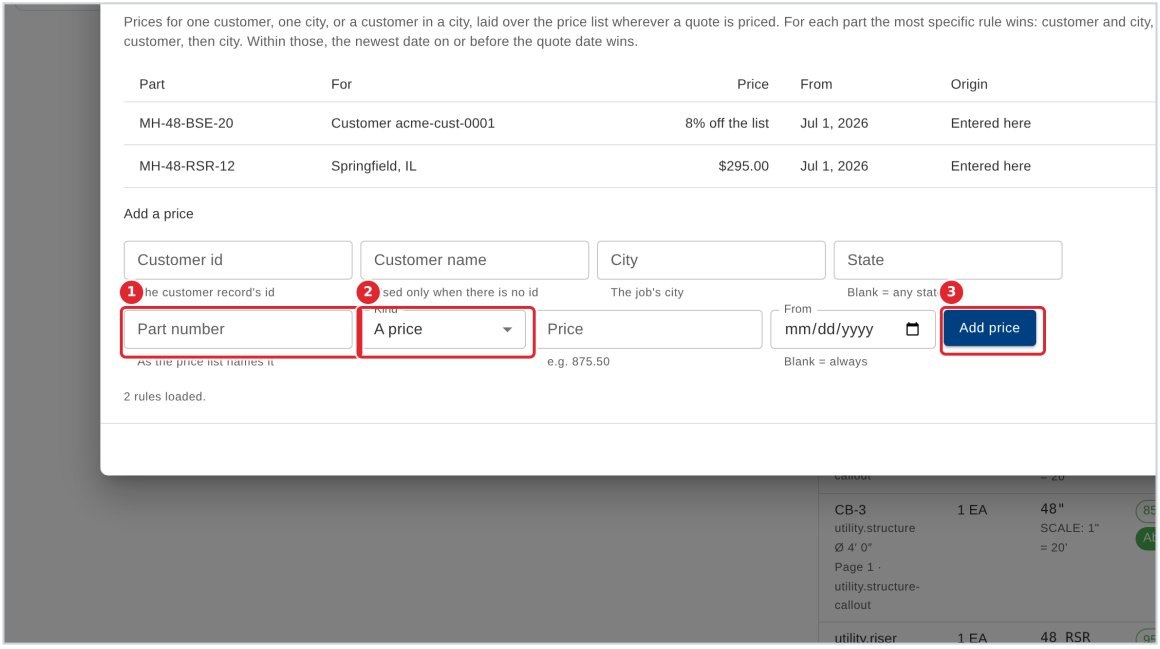
Give one customer, one city, or a customer in a city their own price or percentage on the price list.

Before you start:

- You must be an Estimating administrator: the Estimating admin button appears only for administrators.



Step 1. Customer prices lays prices for one customer, one city, or a customer in a city over the price list. The most specific rule wins: customer and city, then customer, then city.



Step 2. To add one, give the customer or the city, the part number as the price list names it, and either a price or a percentage on the list price (a negative percentage is a discount). Select Add price.

Tips:

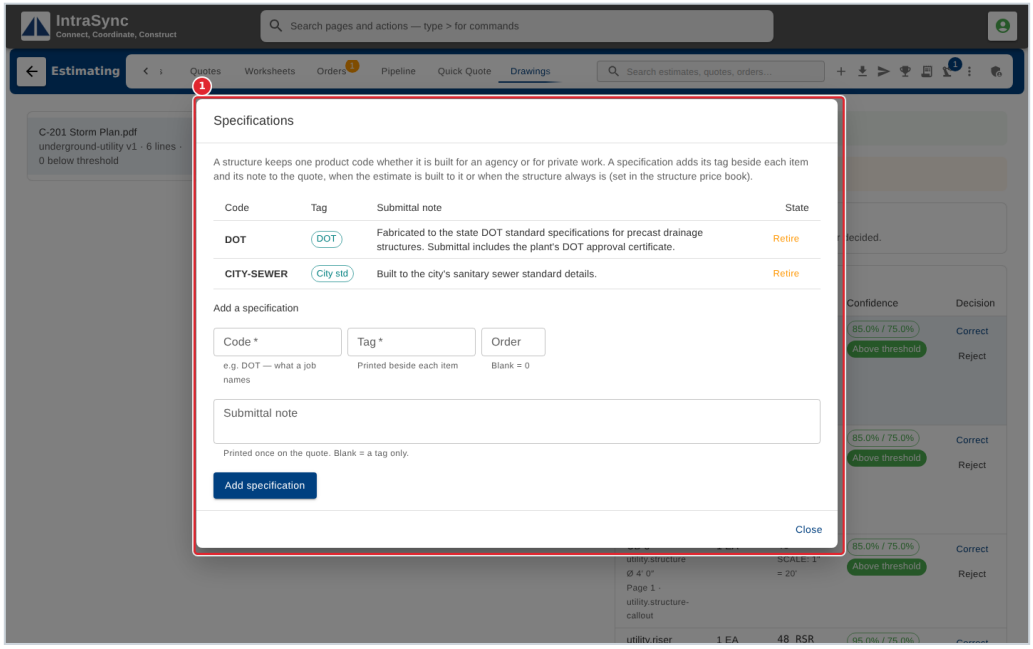
- A price needs a customer (an id or a name) or a city, and the part number the price list uses.
- A price of zero is refused: leave the part out instead.
- Among equally specific rules, the newest one dated on or before the quote date wins.

27. Set up agency specifications

Define the agency specifications a job can be built to, so the quote prints the right tag and submittal note.

Before you start:

- You must be an Estimating administrator: the Estimating admin button appears only for administrators.



Step 1. Specifications are the agency specifications a job can be built to. Each has a code, the tag printed beside each item, and an optional submittal note printed once on the quote. Fill in Add a specification and select Add specification.

Tips:

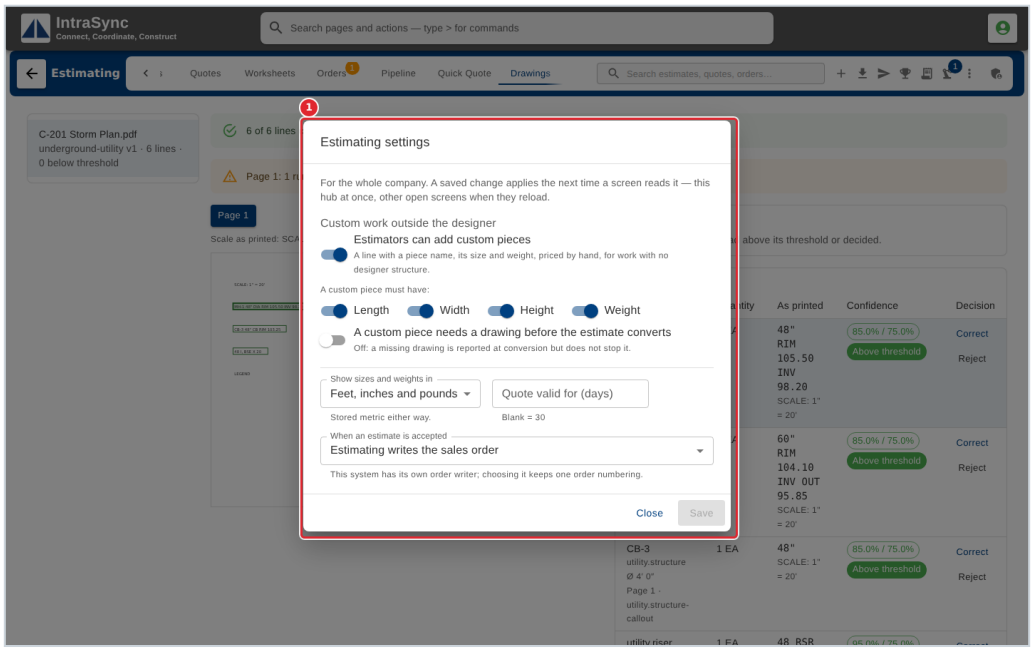
- A code is letters, digits, - and _, up to thirty characters.
- A code that already exists is refused. Change its tag or note in the table instead.
- A structure that is always built to one specification can be set to it in the structure price book.

28. Change the estimating settings

Set how estimating works for the whole company.

Before you start:

- You must be an Estimating administrator: the Estimating admin button appears only for administrators.



Step 1. Estimating settings apply to the whole company: whether estimators can add custom pieces and what a custom piece must have, the units sizes and weights are shown in, how many days a quote is valid for, and who writes the sales order when an estimate is accepted. Select Save.

Tips:

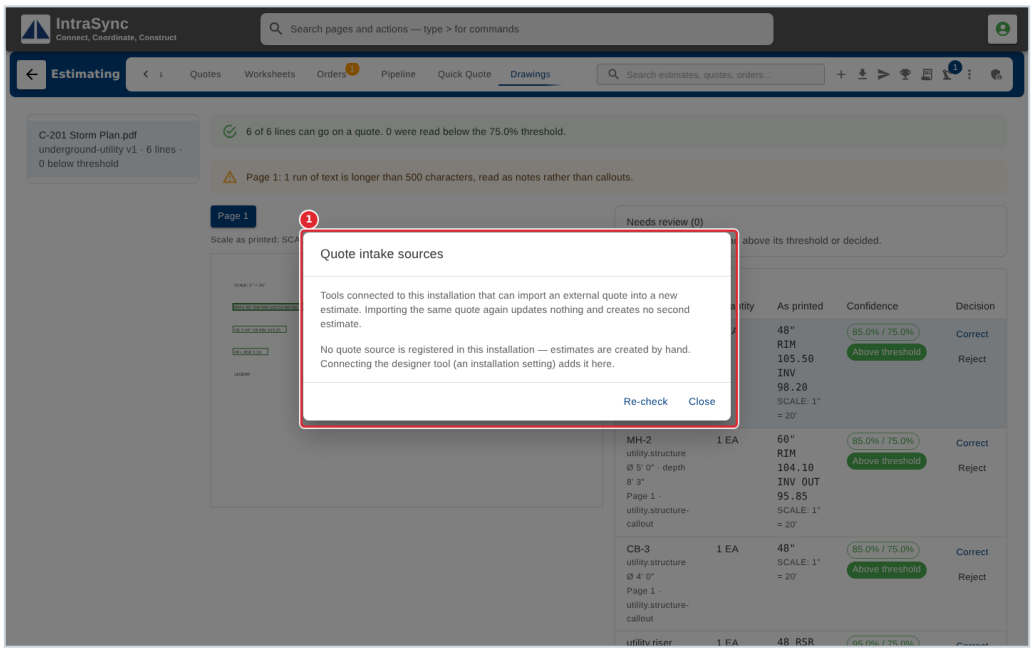
- Quote valid for takes a whole number of days. Left blank, it is thirty.
- A saved change reaches this hub at once, and other open screens when they reload.
- Sizes and weights are stored in metric either way; the setting changes only how they are shown.

29. Check the quote sources and the sales-order connection

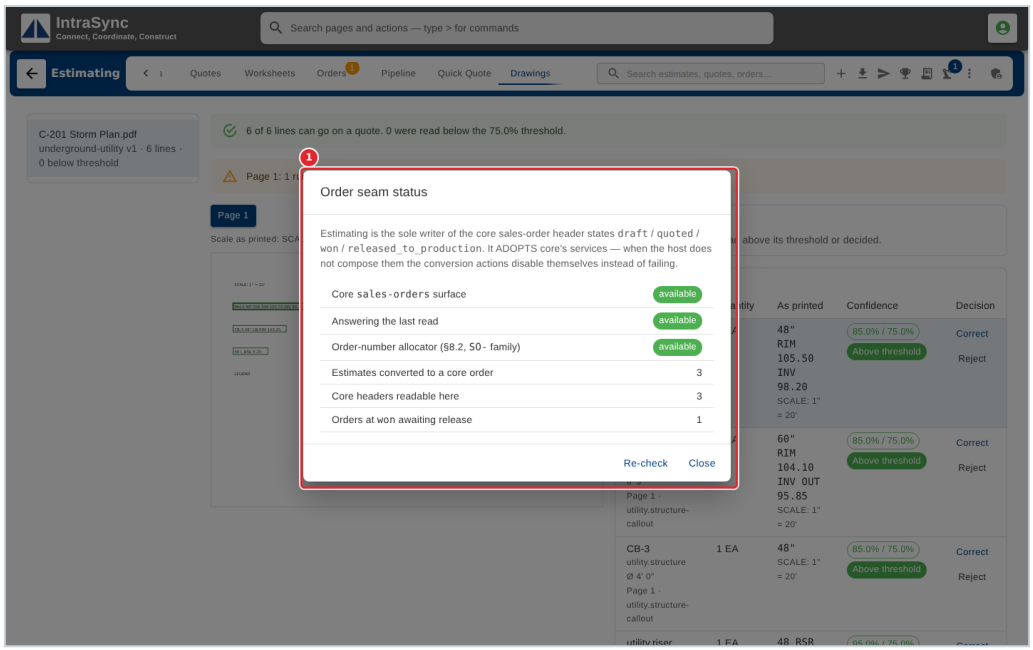
Confirm what this installation is connected to when an import or a conversion does not do what you expect.

Before you start:

– You must be an Estimating administrator: the Estimating admin button appears only for administrators.



Step 1. Quote intake sources lists the tools connected to this installation that can bring an outside quote in as a new estimate. Select Re-check to read them again.



Step 2. Order seam status shows whether sales orders are connected and answering, whether order numbers are given out automatically, and how many converted orders wait for release.

Tips:

- These two screens only read; they change nothing.

Glossary

- Estimate: The priced bid for one job: its lines, its total and its history from first price to sales order.
- Sub-status: Where an estimate stands: In progress, Submitted, Revised, Accepted, Declined, Expired or No bid.
- Quote revision: A permanent record of a quote as it was issued. Issuing again adds a revision and never changes an earlier one.
- Past validity: An open estimate whose quote Valid until date has passed.
- Pricing worksheet: The internal cost build-up behind an estimate's price, built from the rate masters.
- Lump sum: One price the customer sees for a structure made of several pieces. Each piece keeps an internal share for the sales order.
- Release to production: Handing a converted sales order to the plant. It cannot be undone from Estimating.
- Structure price book: The plant's own structure prices, each tied to the document it comes from, that Quick Quote prices against.