



Functional Overview

For

Quoting and Estimating



Quoting and Estimating

This module is designed to efficiently prepare Job Estimates and Quotations which on Acceptance can be used to generate Job Budgets and Procurement Schedules.

Features include:

- Maintain multiple versions of a Quotation.
- Create new quotations from Templates or existing Quotations and automatically re-price using current Labour, Material, Stock and Plant rates.
- Structure the Quotation with multiple Costing Sheets to detail the cost estimates for each stage or element of the job.
- Copy and Insert individual Costing Sheets from existing Quotes or Templates.
- Create an unlimited number of estimate lines per costing sheet.
- Derive Labour Cost Prices based on Employee Class, Person, Activity.
- Use Workbench Supplier Catalogues and Stock to cost materials or manually enter estimated values.
- Select the default Selling Prices for Labour and Material Items from multiple user defined price lists.
- Record adjustments to the default Selling Price to arrive at the Quoted Price.
- Enquiry screen to track outstanding Quotes by Client, Date, Status, Quoted By.
- Record user defined reason codes for Wins and Losses to monitor overall quoting performance.
- Maintain multiple Quotation Report Formats using the Crystal Report Writer.
- Formal Acceptance of the Quotation with the option to use quotation estimate lines to create Job Budgets.
- Use the Bill of Material option to create Job budget lines at the parent part level or the raw material level.
- Interface Estimate lines to Procurement to generate Stock Issues and Purchase Orders.
- Link Costing Sheets to a single Job or separate Sub Jobs within a project.
- Interface to SAP Business One Quotations

Maintain Quotes

Costing Sheet

Person	Emp Class	Activity	Work Centre	Process	Hours	Cost Rate	Sell Rate	Total Cost	Total Sell	Margin
	A1	PN	PR3	IN	5.00	100.00	150.00	500.00	800.00	300.00 39%
	A2	CONF	PR3	IN	12.00	70.00	125.00	840.00	1,500.00	660.00 44%
										0%

Item	Description	Job	Process	Qty	Cost Rate	Sell Rate	Total Cost	Total Sell	Margin
100100	Tonka Sealix Do	IP	IN	3.00	1,500.00	2,500.00	4,500.00	3,000.00	40%
HP2000	HP 2000 Desk Jet	IP	IN	3.00	900.00	1,500.00	2,700.00	4,500.00	40%
MBL2	Workbench Line 2	IP	IN	3.00	1,000.00	2,000.00	3,000.00	6,000.00	50%

Quote Enquiry

Code	Description	Company	Quoted By	Cost	Retail	Margin	%
1024-1	Copy of Replace Power Pole	SM Ltd	Mackay, Malcolm	1,146.00	2,000.00	854.00	44
1036-2	Manufacture 100 Dining Chairs	AA Furniture Ltd	Mackay, Malcolm	11,515.00	15,000.00	3,485.00	23
1048-1	Install Alarm	Delta Utility Services	Gardner, Clive	32,500.00	68,200.00	47,700.00	59
1048-1	GSM Tower	Delta Utility Services	Gardner, Clive	35,240.00	39,690.00	4,450.00	12
1049-1	Transformer Test	SM Ltd	Gardner, Clive	0.00	0.00	0.00	0
1051-1	Replace Power Pole	SM Ltd	Gardner, Clive	1,246.00	1,500.00	254.00	17
1052-1	Office Building at 20 Anywhere	New City Development L	Gardner, Clive	94,305.00	145,475.00	51,170.00	42
1053-1	Supply and Install equipment	Delta Utility Services	Gardner, Clive	13,690.00	20,290.00	6,700.00	33
1057-1	CMA Corporation	New City Development L	Gardner, Clive	157,150.00	178,149.91	20,999.91	12
1059-1	Manufacture 100 Dining Chairs	AA Furniture Ltd	Gardner, Clive	11,450.00	15,000.00	3,550.00	24

Print Quotes

Quotation
Date: 05/05/2003
Quote Ref: RB31
Quoted By: Chris Andrews
Quote Expires: 21/12/2003

Quote To:
Workbench International Ltd
PO Box 17 169
Greenlane
AUCKLAND

Attention : Clive Gardner

User Group Meeting Signage
To Supply, Install and Remove all signage and display materials at Usergroup Meeting venue.

Item	Quantity	Unit Price	Total
Workbench Banner			
Exterior Building Banner			
Graphics		340.00	340.00
Installation		330.00	330.00
Production		2,900.00	2,900.00
Total			3,570.00
Workbench Vinyl Signage			
Internal Signage			
Graphics		340.00	340.00
Installation		330.00	330.00
Production		3,695.00	3,695.00
Total			4,365.00