Company Logo Here	WORK INSTRUCTION			
	DOC NUMBER:	D0059395	**REVISION:**	-
	OWNER:	Customer Service	**REV. DATE:**	12/07/2016
	ENTERING ESTIMATES			

TRIGGER EVENT:

Estimate is requested.

PURPOSE:

This document sets forth a Standard Work Instruction for entering an estimate. This will ensure uniformity and the ability to produce reports that contain the expected data results.

PROCESS:

Quote to Cash

PROCESS STEP(s):

Quote

REFERENCE:

- D0059944 Quote
- D0054080 Customer Service Documentation Storage
- TW-2-OR-2.00 Configured Items
- TW-3-OR-3.00 Int'l End User Pricing

APPLICABILITY:

Sales and Customer Service

RESPONSIBILITY AND ACCOUNTABILITY:

Sales and Customer Service staff are responsible for entering estimates.

DEFINITIONS:

PROCEDURE:

<u>Entering an Estimate</u>

1. Log into SyteLine
2. Open **Customers** form:
   a. Using the Filter in Place button, locate your customer, using the wildcard "*"
   b. Click the filter button to pull up the customer

3. Click on the **Estimates Orders** button on the right
   a. Begin new estimate (“CTRL + N”)
4. Enter the following estimate header detail:
   a. Estimate – tab thru.

Note: Estimate number will be given once saved.

   b. Status – defaults as working
   c. Quote Date – defaults as today’s date
   d. Customer Quote – reference customer quote number if provided. If customer doesn’t supply a quote number, reference the name of the estimate requestor, and current date. (Ex: Abigail 9/24/12).
   e. Expiration Date – defaults to 30 days from quote date
   f. Ship To – select the correct Ship To from the dropdown box
   g. Ship via, terms, and price code will default from customer master
   h. Click on the **Tax Info** tab
      i. Enter the Tax Code information from the dropdown
   i. Save (“CTRL + S” This action will generate the estimate number.)
5. Click on **Estimate Lines** button on the right
   a. Enter the part number and quantity for each item being quoted.
   Note: For equipment estimate request see TW-2-OR-02.00 Configured Items
   b. Save form (“CTRL + S”)
6. Click on **Estimate** button on the right
7. Click on the **Amounts** tab under the customer header information if freight charges are requested or required in advance
   a. Add shipping charges in the Misc. Charges field
   b. Save form (“CTRL + S”)
8. Click on the **Estimate Response Form Report** button on the right.
   a. Ensure the “Use Profile” box is checked.

Note: This ensures the profile is set up under the customer master, and allows customer to receive the estimate via email or fax.

9. Click Preview button

Note: A PDF file will appear with estimate details; review for accuracy before sending it to the customer.

10. Click on the Print button; close all estimate forms associated with the customer

Note: Estimate will automatically be sent to the customer.

11. Manually scan, browse, or upload from email the estimate request and any corresponding documentation to the customer service documentation storage

Note: See Doc Number D0054080 Customer Service Documentation Storage

Additional steps for International Estimate

1. Follow the general Entering Estimates guidelines
2. Under Customers tab click on the Note Pad Icon located on the SyteLine toolbar to add or review shipping instructions that pertain to the customer or country specific requirements
3. If applicable, on the last item of the estimate attach a note with Company's bank information:
    a. Click on the Notes Icon on the SyteLine Toolbar
        i. In the subject field type: Bank Details
        ii. In the note field put the Bank Details, ABA Routing # and Account #
4. Add an additional $40 to Misc. Charges to cover bank wire fees
5. Print a paper copy of the estimate and any corresponding documentation. File by country in filing cabinets located in the Customer Service/Inside Sales Department area.

REVISION	DATE	DESCRIPTION OF CHANGE
-	12/07/2016	Initial release