Company Logo Here	WORK INSTRUCTION			
	DOC NUMBER:	D0061965	**REVISION:**	-
	OWNER:	Customer Service	**REV. DATE:**	04/03/2017

CREATING AN ESTIMATE FROM A PROSPECT ACCOUNT

TRIGGER EVENT:

A prospect account requests an estimate.

PURPOSE:

The purpose of this document is to record the SyteLine steps required to create a formal estimate from a Prospect Account.

PROCESS:

Quote to Cash

PROCESS STEP(s):

Quote

REFERENCE:

- ISO 9001 Quality Management Systems – Requirements
- D0059944 Quote
- D0061964 Creating a Prospect Account
- TW-2-OR-2.00 Configured Items
- D0054080 Customer Service Documentation Storage

APPLICABILITY:

Sales and Customer Service

RESPONSIBILITY and ACCOUNTABILITY:

Sales and **Customer Service** staff are responsible for entering estimates.

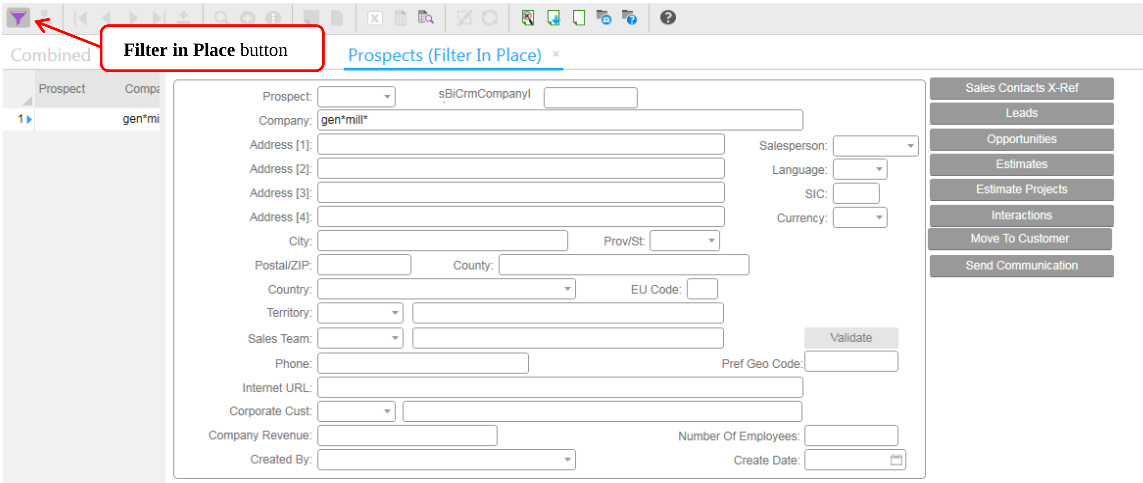
DEFINITIONS:

Prospect – A qualified lead or potential client which has expressed interest in the products and services of the seller, and has requested a formal estimate.

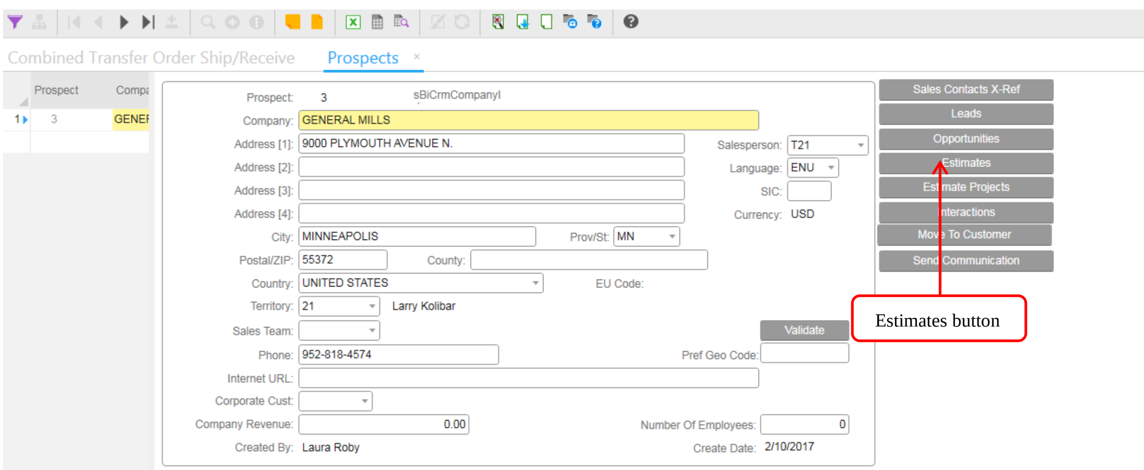
PROCEDURE:

1. Log into SyteLine
2. Open **Prospects** form
    a. Enter the prospect number in the dropdown box or partial company name (followed by *) in the text field.

b. Click the Filter in Place button to pull up the prospect



3. Click on **Estimates** button (located on the upper right side of the screen)



   a. To begin a new estimate (**CTRL + N**)

4. Enter the following estimate header detail:

   a. Estimate field – tab through (Estimate number will be system generated once saved).

   b. Status field – defaults to working

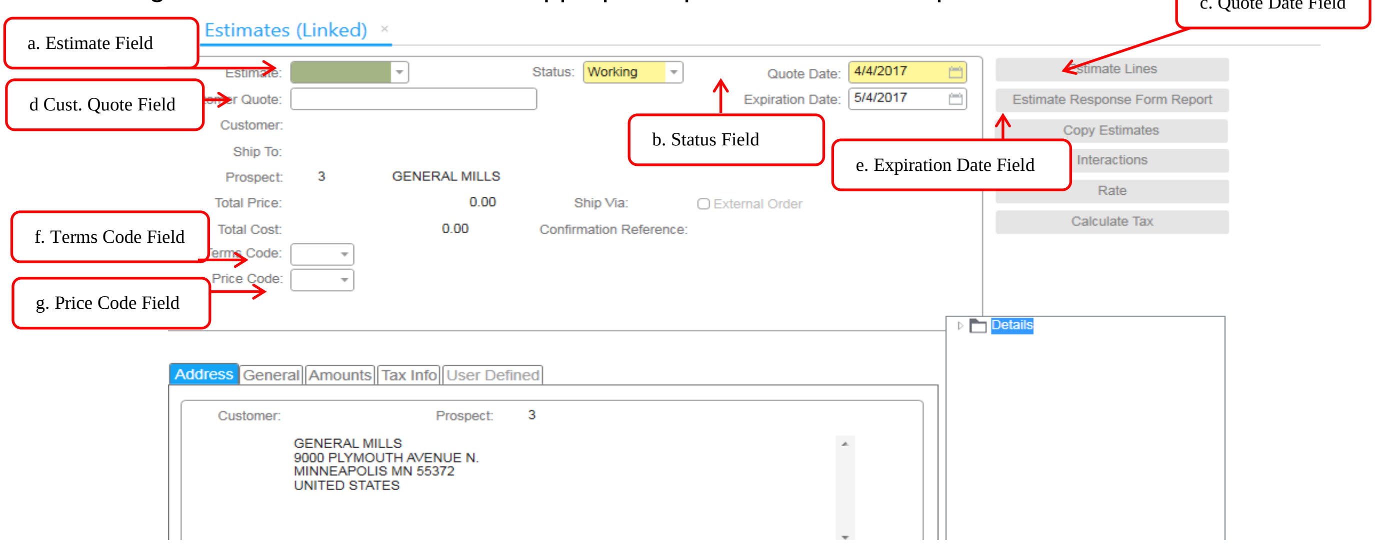
   c. Quote Date field – defaults to current date.

   d. Customer quote field – reference customer quote number, if provided. If customer didn't supply a quote number, reference the name of the estimate requestor, and current date (e.g., Abigail 09/24/12).

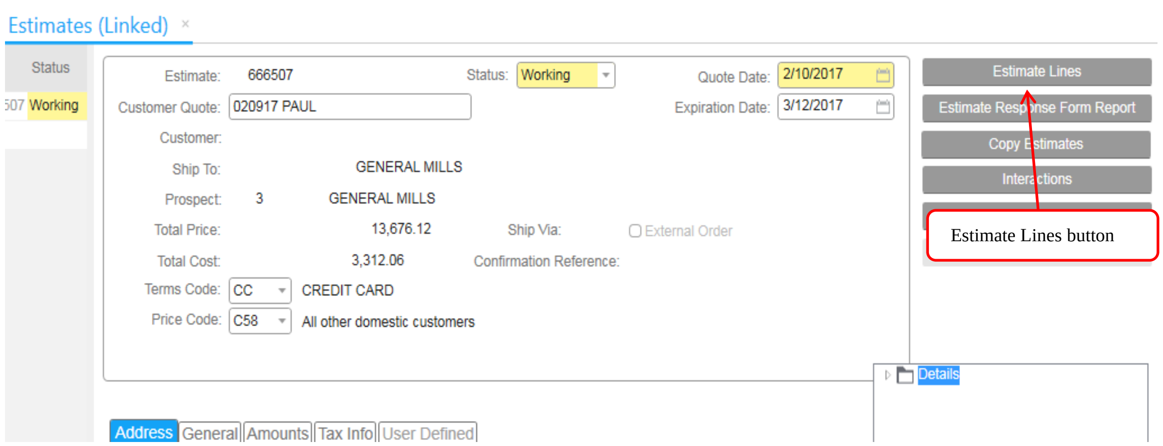
   e. Expiration Date field – 30 days from current date

   f. Terms Code field – Select appropriate payment terms from dropdown menu. If payment terms are unknown use code DP (Payment in Advance).

g. Price Code field – Select appropriate price code from dropdown menu.

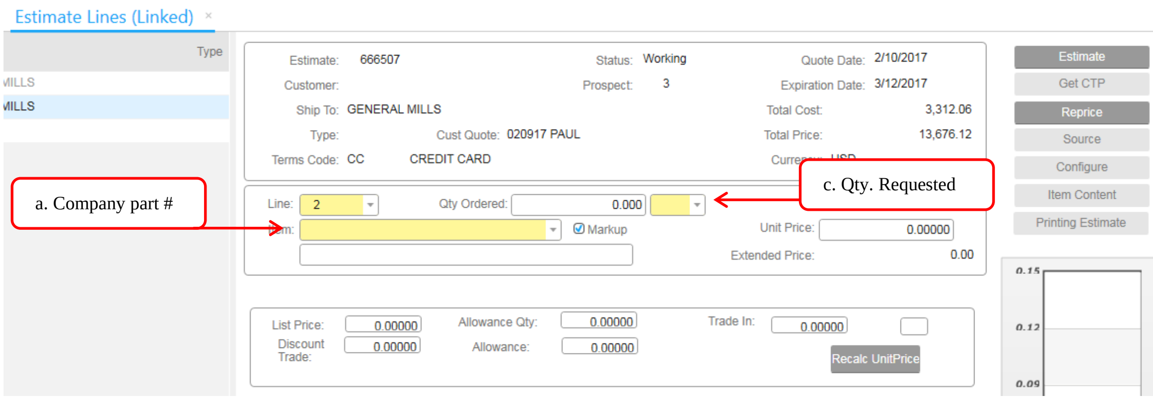


5. Save form (**CTRL + S**)
6. Click on **Estimate Lines** button (located on the upper right side of the screen)



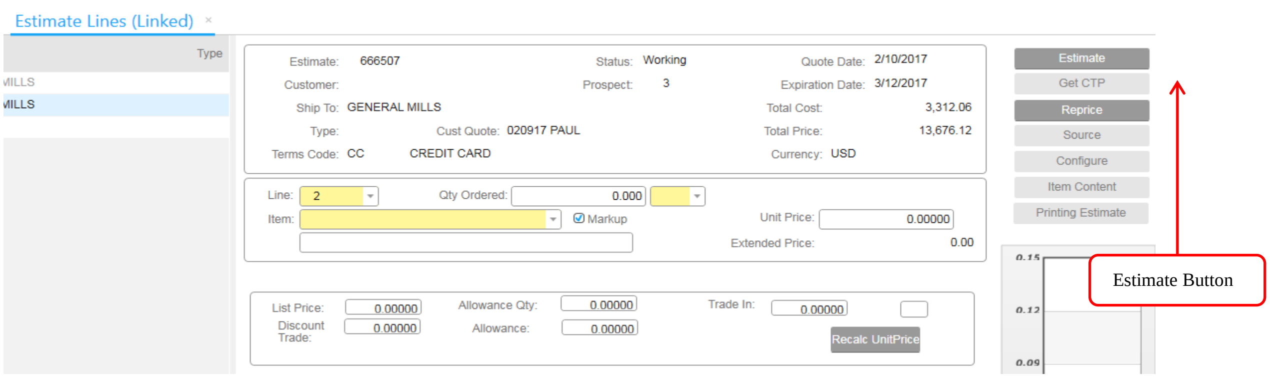
a. Enter the Company part number
b. Hit tab three times
c. Insert the quantity requested

Note: For equipment estimates request see TW-2-OR-02.00 Configured Items.



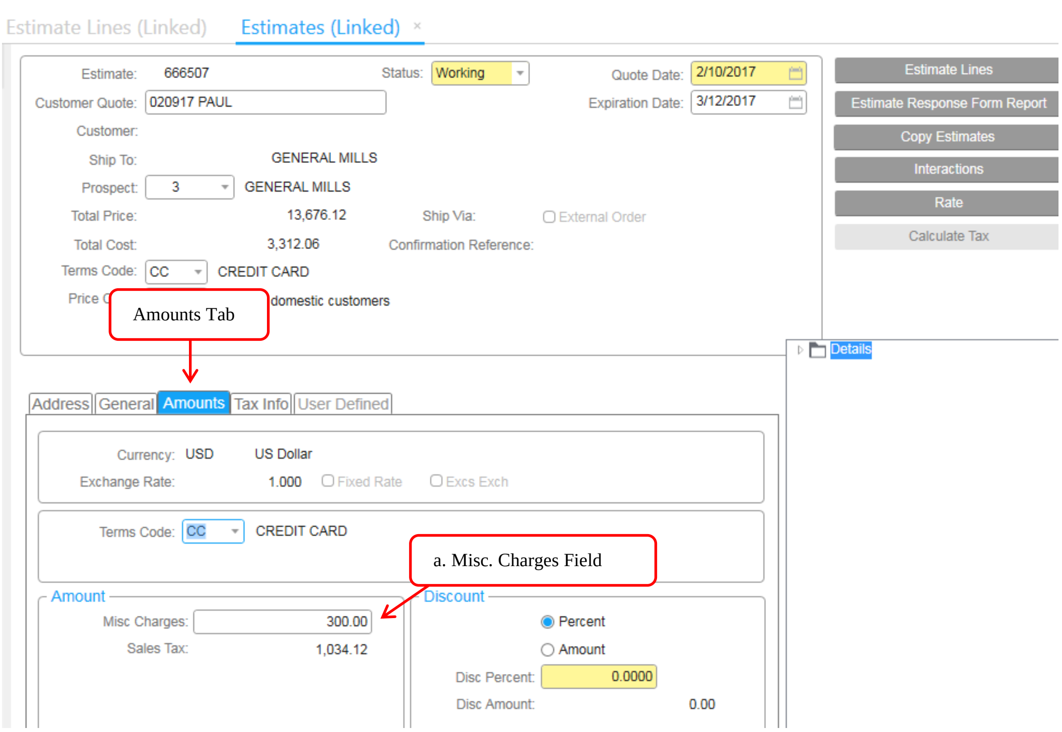
d. Save form (**CTRL + S**)

7. Click on **Estimates** button (located on the upper right side of the screen)

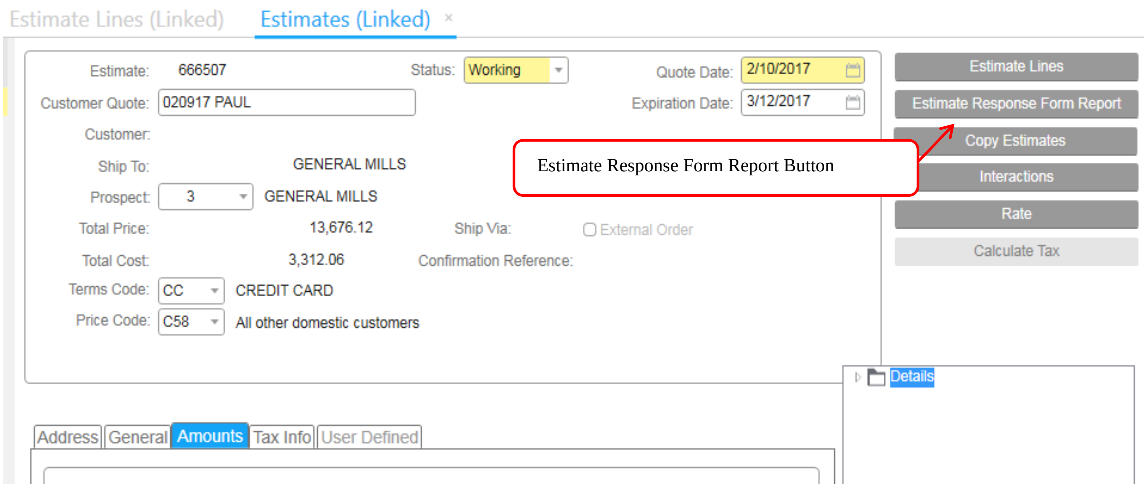


8. If freight charges are requested or required in advance, click on the amounts tab.

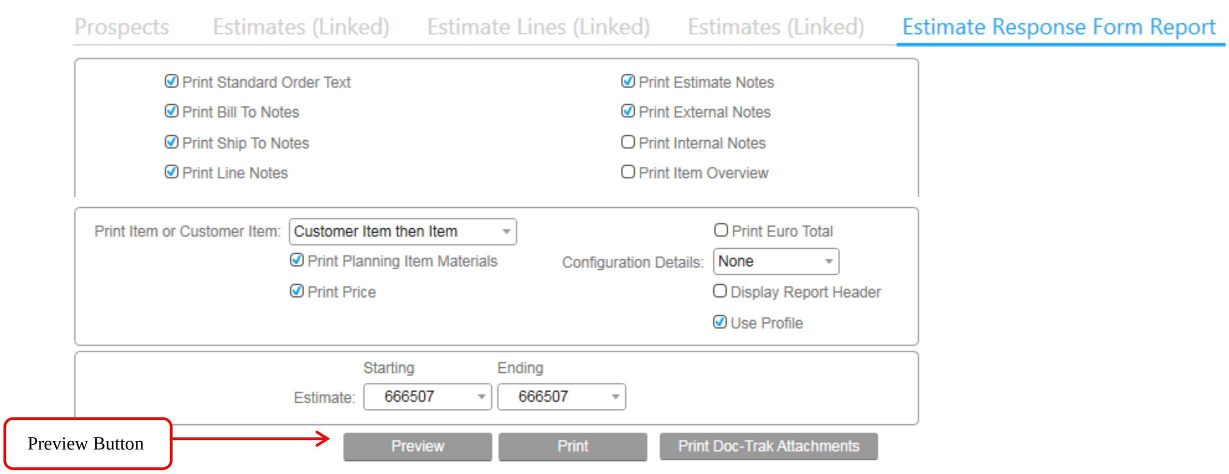
    a. Add shipping charges in Misc. Charges field



9. Save form (**CTRL + S**)
10. Click on the Estimate Response Form Report button (located on the upper right side of the screen)



11. Click on **Preview** button



12. Download Estimate Response Form
    a. A PDF file will appear with estimate details, review for accuracy before saving and sending to the customer
13. Manually scan, browse, or upload from email the estimate request and any corresponding documentation to the customer service documentation storage (See D0054080 Customer Service Documentation Storage)

REVISION	DATE	DESCRIPTION OF CHANGE
-	04/03/2017	Initial release