

## WORK INSTRUCTION

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**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.

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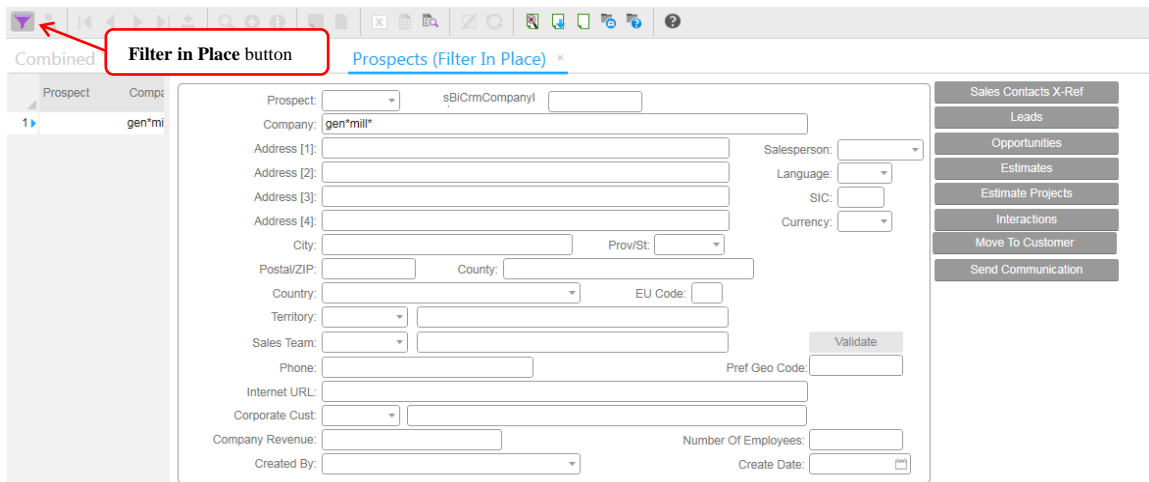
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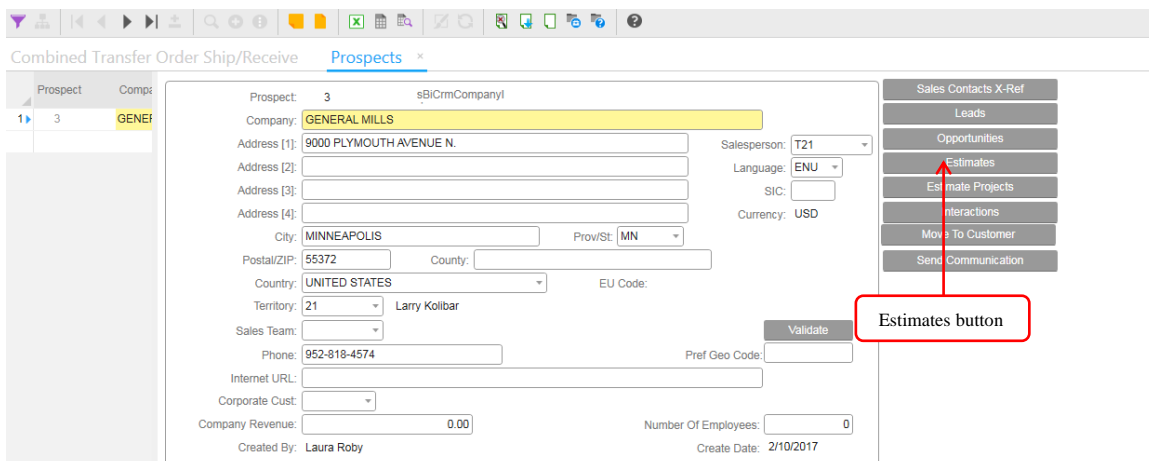
### CREATING AN ESTIMATE FROM A PROSPECT ACCOUNT

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



The screenshot shows a software interface with a toolbar at the top. A red box highlights the 'Filter in Place' button, which is represented by a purple funnel icon. Below the toolbar, there is a search bar and a list of prospects. The main area of the screen is a form for editing a prospect. The form contains various fields for prospect information, including company name, address, city, state, and phone number. A red arrow points from the 'Filter in Place' button to the 'Filter in Place' text in the toolbar.

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



The screenshot shows the same software interface as the previous one, but now the 'Estimates' button is highlighted with a red box. The 'Estimates' button is located on the right side of the screen, in a vertical menu. The main area of the screen is a form for editing a prospect. The form contains various fields for prospect information, including company name, address, city, state, and phone number. A red arrow points from the 'Estimates' button to the 'Estimates' text in the toolbar.

- a. To begin a new estimate (**CTRL + N**)
4. Enter the following estimate header detail:
- Estimate field – tab through (Estimate number will be system generated once saved).
  - Status field – defaults to working
  - Quote Date field – defaults to current date.
  - 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).
  - Expiration Date field – 30 days from current date
  - Terms Code field – Select appropriate payment terms from dropdown menu. If payment terms are unknown use code DP (Payment in Advance).

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

The screenshot shows the 'Estimates (Linked)' form. Callouts point to the following fields:

- a. Estimate Field: The Estimate dropdown menu.
- b. Status Field: The Status dropdown menu (set to 'Working').
- c. Quote Date Field: The Quote Date dropdown menu (set to 4/4/2017).
- d. Cust. Quote Field: The Customer Quote text input field.
- e. Expiration Date Field: The Expiration Date dropdown menu (set to 5/4/2017).
- f. Terms Code Field: The Terms Code dropdown menu.
- g. Price Code Field: The Price Code dropdown menu.

Other visible fields include Customer (GENERAL MILLS), Prospect (3), Total Price (0.00), Total Cost (0.00), and Ship Via (External Order).

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

6. Click on **Estimate Lines** button (located on the upper right side of the screen)

The screenshot shows the 'Estimates (Linked)' form after saving. The 'Estimate Lines' button is highlighted with a red box and an arrow. Other visible fields include Estimate (666507), Status (Working), Quote Date (2/10/2017), Expiration Date (3/12/2017), Customer Quote (020917 PAUL), Customer (GENERAL MILLS), Prospect (3), Total Price (13,676.12), Total Cost (3,312.06), Terms Code (CC - CREDIT CARD), and Price Code (C58 - All other domestic customers).

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.**

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Estimate Lines (Linked) x

WILLS  
WILLS

Estimate: 666507 Status: Working Quote Date: 2/10/2017  
Customer: Prospect: 3 Expiration Date: 3/12/2017  
Ship To: GENERAL MILLS Total Cost: 3,312.06  
Type: Cust Quote: 020917 PAUL Total Price: 13,676.12  
Terms Code: CC CREDIT CARD Currency: USD

a. Company part # → Line: 2 Qty Ordered: 0.000

c. Qty. Requested →

List Price: 0.00000 Allowance Qty: 0.00000 Trade In: 0.00000  
Discount: 0.00000 Allowance: 0.00000  
Recalc UnitPrice

Estimate  
Get CTP  
Reprice  
Source  
Configure  
Item Content  
Printing Estimate

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

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

Estimate Lines (Linked) x

WILLS  
WILLS

Estimate: 666507 Status: Working Quote Date: 2/10/2017  
Customer: Prospect: 3 Expiration Date: 3/12/2017  
Ship To: GENERAL MILLS Total Cost: 3,312.06  
Type: Cust Quote: 020917 PAUL Total Price: 13,676.12  
Terms Code: CC CREDIT CARD Currency: USD

Line: 2 Qty Ordered: 0.000

List Price: 0.00000 Allowance Qty: 0.00000 Trade In: 0.00000  
Discount: 0.00000 Allowance: 0.00000  
Recalc UnitPrice

Estimate  
Get CTP  
Reprice  
Source  
Configure  
Item Content  
Printing Estimate

Estimate Button

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

a. Add shipping charges in Misc. Charges field

Estimate Lines (Linked) Estimates (Linked) x

Estimate: 666507 Status: Working Quote Date: 2/10/2017  
Customer Quote: 020917 PAUL Expiration Date: 3/12/2017  
Customer: GENERAL MILLS  
Ship To: GENERAL MILLS Prospect: 3  
Total Price: 13,676.12 Ship Via: External Order  
Total Cost: 3,312.06 Confirmation Reference:  
Terms Code: CC CREDIT CARD  
Price domestic customers

Amounts Tab

Address | General | Amounts | Tax Info | User Defined

Currency: USD US Dollar  
Exchange Rate: 1.000 Fixed Rate Excs Exch

Terms Code: CC CREDIT CARD

Misc Charges: 300.00  
Sales Tax: 1,034.12

Amount Discount  
Disc Percent: 0.0000  
Disc Amount: 0.00

Estimate Lines  
Estimate Response Form Report  
Copy Estimates  
Interactions  
Rate  
Calculate Tax

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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