

Estimating and Vendor Quotes

An Estimating and Vendor Quote Workflow Guide



Production Estimating – What can it do for you?

Estimate Usage

The Estimating application is used to prepare quotes for production jobs. Estimates can be created automatically using Job Specifications, Preset Templates or extensive Copy features. Estimates can be entered, revised, tracked and printed.

Within a single estimate, multiple quotes can be created based on multiple versions of the job. This allows for a number of different options to be presented to the client for a single job.

Revisions may be made to quotes creating a revision history where earlier revisions are tracked and can even be reviewed.

Advantage provides several different methods for developing the quote details. Features include Vendor Pricing Sheets, Vendor Quote Requests, Job History and Function Summary with Actuals.

Complete and detailed Vendor Quote Requests can now be created and printed directly from the Estimating application. Job Specifications may be included on Vendor Quote Requests automatically and that information carries over to other areas of the system ensuring accuracy and saving time. Complete automation of the entire estimating process exists through a single application.

Once an estimate quote is approved, it can be compared against actual charges posted against the associated job. Although reports and queries are provided to compare this information, it is also displayed directly on the estimating screen. Approved estimate quotes can be advance billed in part or in whole through the Advance Billing Application.

Estimates can be printed from within the Estimate/Quote screen or from the Production Reports. They can also be printed to a .PDF and attached to an email directly from within the application.

From beginning to end your agency's estimating process becomes more efficient and less time consuming when you use the Estimating application.

Setup Options – Customize your options to match your workflow and improve efficiency!

How you use the Estimating application within your agency can be managed in a large part by how the options are configured. Whether it is necessary to require an approved estimate, or if changes to an existing estimate require a new revision, are just a couple of decisions that are up to you. Taking the time to review and implement some of these options in the beginning will save time when estimates are created.

Maintenance – General Setup – Agency

Settings made in the Agency Maintenance application are global, setting the default standards that apply to the entire Agency. Some may be overridden at other levels.

Production Options

☐ Client Reference must be unique to use for look-up? ☒ Allow QvA drill-down in Timesheets?

☐ Mark Job Component as taxable or non-taxable? ☐ Purchase Order amount required?

☒ Enable file attachments and scanning tab in Job Jacket? ☒ Enable Purchase Order Default Email Group?

☐ Enable attachment file dialog?

☒ Approved estimate required?

☒ Allow required estimate setting on job to be overridden?

☐ Hide No Bill Flag in Job Jacket?

☒ Require new revisions when editing estimates?

☒ Does quote approval require a password?

Estimate Processing/Exceed Options

Application	Allow w/o Appr Est?	Allow Entry To Exceed Estimate?	Display Message (maximum 150 characters)
Purchase Orders	<input type="checkbox"/>	Warn	

Purchase Order Default Footer Comments

Approval must be received prior to start of work

Footer comments are editable for each purchase order. The edited comment will be saved with the P.O.

Estimate Default Comments

Default comments are entered in the Production Options tab.

- **Approved estimate required** – There are several levels available to determine if an approved estimate is required. When used, processes will be restricted for jobs that do not have an approved estimate. Check this option at one of the levels listed below depending on your requirements.
 - Agency - Selecting this option at the Agency level will affect all jobs in the Agency.
 - Product – Selecting this option at the Product level will affect all jobs just for that product. The Agency level setting will override the Product level setting.
 - Job – Selecting this option at the Job level will affect the individual job. The Agency level setting and Job level setting will cause the Job level setting to default to true. If the option to override the job level (see below) is checked, the user may override the job level setting. Otherwise, the default will be used.

- **Allow required estimate settings on job to be overridden** – For some jobs an approved estimate might not be a necessity. This option allows users to override the agency and product default settings for Approved Estimate Required at the job level.
- **Estimate Processing/Exceed Options** - Individual processes may be further defined through settings designed to warn the user or disallow entry when an amount exceeds the approved estimate. This feature may be used independently or in conjunction with the Approved Estimate Required flag.
 - **Allow w/o Appr Est?** - If this option is not checked, the process cannot be done if there is not an approved estimate attached to the job. If this option is checked, the process will be allowed to take place, even if when no approved estimate exists.
 - **Allow Entry to Exceed Estimate?** - There are three choices:
 - **Yes** - Allows the entry to exceed the approved estimate.
 - **No** - Does not allow the entry to exceed the approved estimate.
 - **Warn** - Warns the user if the amount exceeds the approved estimate but allows save to continue.
 - **Display Message** - A personalized message containing up to 150 characters can be entered. Leaving no guesses as to why a restriction may exist.
- **Require new revisions when editing estimates?** – Tracking the changes made to estimates can be controlled by forcing each change made to a saved estimate to require a new revision. Each revision can have its own Revision comments added prior to being saved. These are saved along with the specific revision they were entered for and can be viewed at a later date.
- **Does quote approval require a password?** – If you use the stand alone version of Quote Approval, you may limit access by providing added security and individual passwords. The Estimate application also provides proper security so that users may or may not approve quotes based on their rights, this is another option you may find useful.
- **Estimate Default Comments** - Enter a comment that will appear on the footer of each printed estimate. This information may contain policy information, contact information or information on how long an estimate might be valid for.

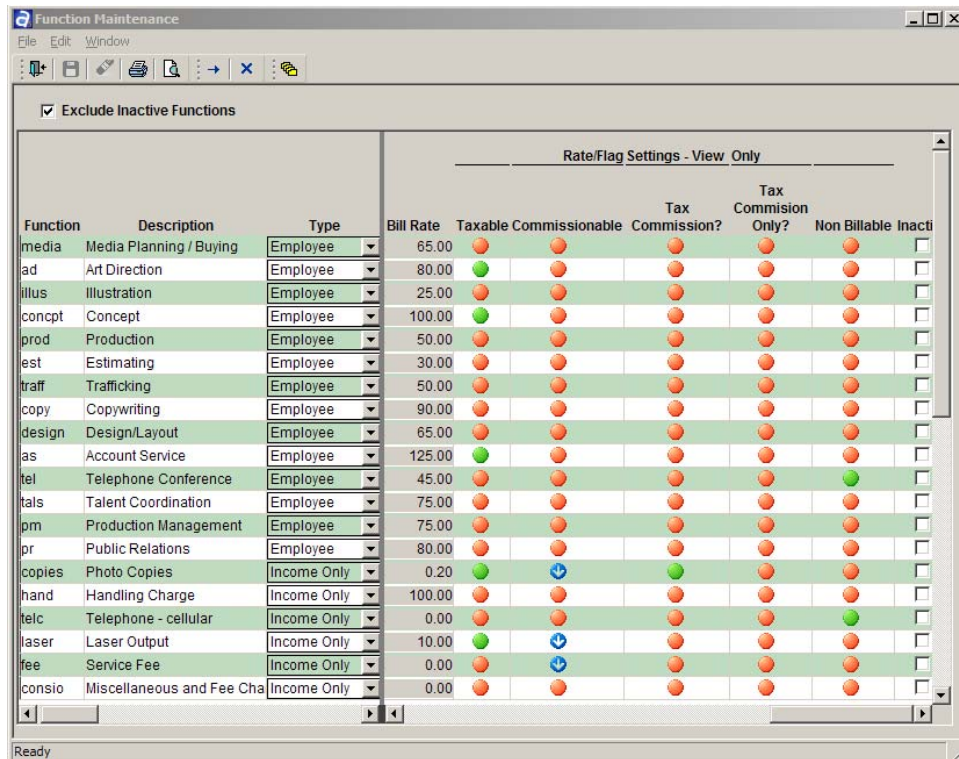
Maintenance – Billing Rates

Advantage contains a user-defined hierarchy of billing rates with unlimited levels. These rates are automatically utilized when estimates are created. When creating estimates, depending on the function and employee entered, the correct billing rate, markup settings and tax settings will be used automatically. These same settings will be used later when actual charges are posted so that you'll see a complete comparison of actual charges to estimated charges throughout the system.

Maintenance – General Setup – Function

Functions are an integral part of the estimating process. Function settings are used in Estimates to establish default rates, markup, billable flags and taxability.

Vendor, Employee, Income Only or Client OOP Functions may be created. Client OOP functions are used where estimated costs are passed directly to the client from the Vendor.



The screenshot shows the 'Function Maintenance' application window. It has a menu bar (File, Edit, Window) and a toolbar. A checkbox labeled 'Exclude Inactive Functions' is checked. The main area is titled 'Rate/Flag Settings - View Only' and contains a table with the following columns: Function, Description, Type, Bill Rate, Taxable, Commissionable, Tax Commission?, Tax Commission Only?, Non Billable, and Inactive. The table lists 20 functions, including media, ad, illus, concept, prod, est, traff, copy, design, as, tel, tals, pm, pr, copies, hand, telc, laser, fee, and consio. Each function has a dropdown menu for its type and a row of colored circles (green, orange, red, blue) representing different settings.

Function	Description	Type	Bill Rate	Taxable	Commissionable	Tax Commission?	Tax Commission Only?	Non Billable	Inactive
media	Media Planning / Buying	Employee	65.00	●	●	●	●	●	□
ad	Art Direction	Employee	80.00	●	●	●	●	●	□
illus	Illustration	Employee	25.00	●	●	●	●	●	□
concept	Concept	Employee	100.00	●	●	●	●	●	□
prod	Production	Employee	50.00	●	●	●	●	●	□
est	Estimating	Employee	30.00	●	●	●	●	●	□
traff	Trafficking	Employee	50.00	●	●	●	●	●	□
copy	Copywriting	Employee	90.00	●	●	●	●	●	□
design	Design/Layout	Employee	65.00	●	●	●	●	●	□
as	Account Service	Employee	125.00	●	●	●	●	●	□
tel	Telephone Conference	Employee	45.00	●	●	●	●	●	□
tals	Talent Coordination	Employee	75.00	●	●	●	●	●	□
pm	Production Management	Employee	75.00	●	●	●	●	●	□
pr	Public Relations	Employee	80.00	●	●	●	●	●	□
copies	Photo Copies	Income Only	0.20	●	●	●	●	●	□
hand	Handling Charge	Income Only	100.00	●	●	●	●	●	□
telc	Telephone - cellular	Income Only	0.00	●	●	●	●	●	□
laser	Laser Output	Income Only	10.00	●	●	●	●	●	□
fee	Service Fee	Income Only	0.00	●	●	●	●	●	□
consio	Miscellaneous and Fee Cha	Income Only	0.00	●	●	●	●	●	□

Maintenance – Production - Estimate Preset Templates

Estimate Preset Templates group functions to automate the creation of estimates by the type of job the estimate is for. Other details such as the “supplied by” and “quantity/hours” may also be established at this level.

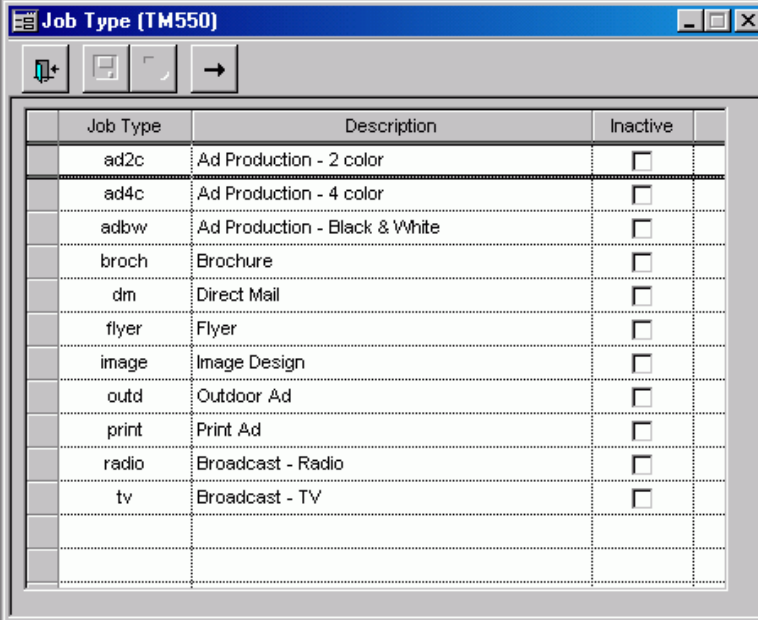
- Functions must be previously set up in the Function application in Maintenance.
- A single Function can be used in more than one preset group.
- A single Function can be used more than one time in a Preset group.

When a preset template is selected in Estimating, all of the Functions and other details associated with that template are automatically inserted in the Estimate. This allows for known processes to be predefined speeding up the Estimating process.

- The pre-defined information can be manually overridden on any estimate quote.
- These can also be used to incrementally build the Estimate in phases.

Maintenance – Production – Job Type

Job Types are used to categorize Job Components based on the type of work being done. Job Types are used to filter job components, when using the Copy and Job History features, throughout the system and in Estimating. They are also use on Vendor Pricing sheets so that vendor prices may be categorized by type of work. We highly recommend defining a detailed set of Job Types and then assigning a Job Type to every job opened. The Job Type field may be made “required” through the Agency or Client setup options.

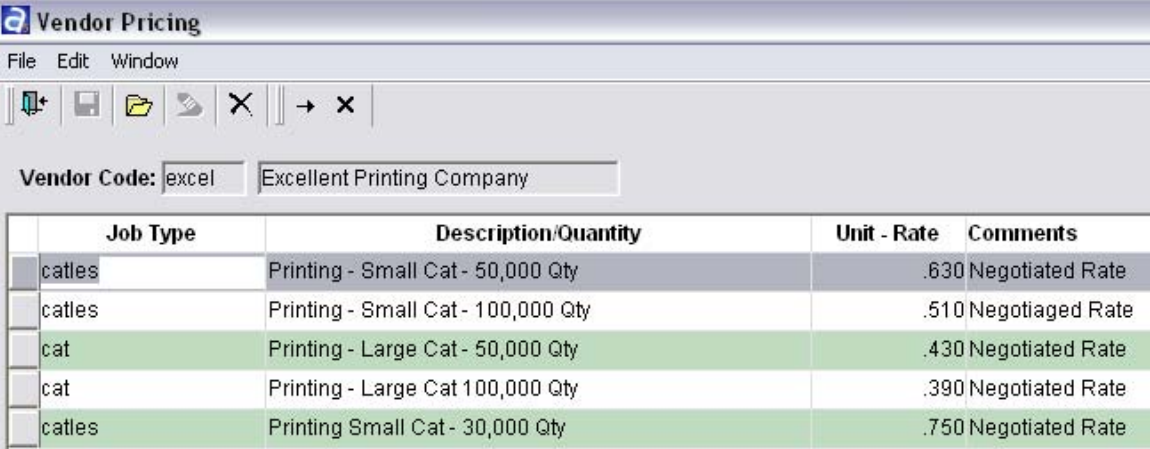


The screenshot shows a window titled "Job Type (TM550)". It contains a table with three columns: "Job Type", "Description", and "Inactive". The table lists various job types with their corresponding descriptions and inactive checkboxes.

Job Type	Description	Inactive
ad2c	Ad Production - 2 color	<input type="checkbox"/>
ad4c	Ad Production - 4 color	<input type="checkbox"/>
adbw	Ad Production - Black & White	<input type="checkbox"/>
broch	Brochure	<input type="checkbox"/>
dcm	Direct Mail	<input type="checkbox"/>
flyer	Flyer	<input type="checkbox"/>
image	Image Design	<input type="checkbox"/>
outd	Outdoor Ad	<input type="checkbox"/>
print	Print Ad	<input type="checkbox"/>
radio	Broadcast - Radio	<input type="checkbox"/>
tv	Broadcast - TV	<input type="checkbox"/>

Maintenance – Production – Vendor Pricing Sheets

Vendor Pricing Sheets may be developed for production vendors to store standard or negotiated rates for any type of work. The pricing sheets may be categorized by Job Type and include the rate description, unit rate and comments. Later, these prices may be used to create the estimate detail.



The screenshot shows a window titled "Vendor Pricing". It has a menu bar (File, Edit, Window) and a toolbar. Below the toolbar, there is a "Vendor Code" field with the value "excel" and a text field containing "Excellent Printing Company". The main area contains a table with four columns: "Job Type", "Description/Quantity", "Unit - Rate", and "Comments".

Job Type	Description/Quantity	Unit - Rate	Comments
catles	Printing - Small Cat - 50,000 Qty	.630	Negotiated Rate
catles	Printing - Small Cat - 100,000 Qty	.510	Negotiated Rate
cat	Printing - Large Cat - 50,000 Qty	.430	Negotiated Rate
cat	Printing - Large Cat 100,000 Qty	.390	Negotiated Rate
catles	Printing Small Cat - 30,000 Qty	.750	Negotiated Rate

Now that we’ve covered the basic set up options, we’ll discuss how to put those options to work for you.

Creating New Estimates

Estimates consist of the Estimate, Estimate Component and Quotes. The estimate and estimate component are linked to individual job and job components. The quotes represent different versions that need to be presented to the client.


Several options are available to help you create accurate estimates quickly and easily. Estimates are started using several different options. Details are added after the basic estimate and quote options are established. Advantage provides the ability to create new estimates by;

- Using existing Job Specifications
- Copying from an existing Estimate
- Loading function detail from Preset Templates

Creating an Estimate from Job Specifications

From the Job Jacket / Job Specifications window, the Estimate application may be accessed. If an estimate has not already been created for that job, the option to generate the estimate shell (estimate and related quotes) becomes available. If the estimate has already been created, the estimate is displayed.



Creating an Estimate from the Job Specifications is as easy as selecting the  estimate button. The **Create Estimate From** window is displayed providing the option to create an estimate quote for each version and quantity in the specs.

Create estimate from...					
Create Quote	Version	Max Revision	Quantity	Version Description	
<input checked="" type="checkbox"/>	1	0	50,000	Catalog v1 - Fashion line with sale items 30 pages.	
<input checked="" type="checkbox"/>	1	0	100,000	Catalog v1 - Fashion line with sale items 30 pages.	
<input checked="" type="checkbox"/>	2	0	50,000	Catalog v2 - Fashion line without sale items 16 pages.	
<input checked="" type="checkbox"/>	2	0	100,000	Catalog v2 - Fashion line without sale items 16 pages.	

The estimate is automatically generated from the **Job Specification** window including job description and other details along with a quote for each version and quantity selected. Quotes are listed in the Estimate Quotes window from the Estimate Header screen.

Client:	abc	ABC Childrens Clothing	Estimate:	000020	Fashion Line Catalog Mailer
Division:	abc	ABC Childrens Clothing	Component:	001	Fashion Line Catalog Mailer
Product:	abc	ABC Childrens Clothing	Job:	000027	Fashion Line Catalog Mailer
Campaign:	pfl	Fashion Line - Print Promos	Component:	001	Fashion Line Catalog Mailer
Sales Class:	coll	Collateral Production	Contact:		Markup %: 17.650
Client Ref:					

Quote	Description	Rev	Amount	Quantity	CPU	Approved By
Quote 001	Catalog v1 - Fashion line with sale items 30 pages.	0	0.00	50,000	0.000	
Quote 002	Catalog v1 - Fashion line with sale items 30 pages.	0	0.00	100,000	0.000	
Quote 003	Catalog v2 - Fashion line without sale items 16 pa...	0	0.00	50,000	0.000	
Quote 004	Catalog v2 - Fashion line without sale items 16 pa...	0	0.00	100,000	0.000	

Creating a New Estimate from the Job Jacket or Estimate Applications

There are two options for creating the estimate (without using Job Specifications); creating from the Job Jacket and creating from the Estimate application.

Creating the Estimate directly from the Job Jacket simplifies the process by automatically linking to the job/component and inserting descriptions onto the estimate. The estimate may optionally be created through the Estimate application (with or without a job). If the estimate is created prior to the job, it may be linked to the job later. Using either method, the Copy Estimate option is available.

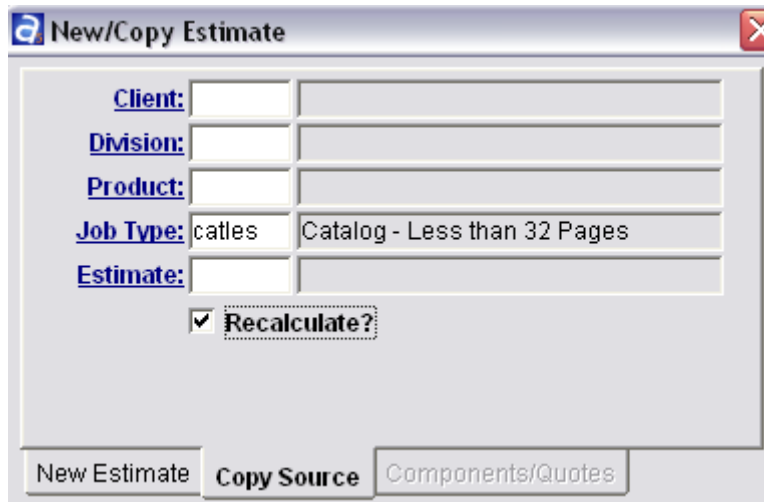
Client:	abc	ABC Childrens Clothing
Division:	abc	ABC Childrens Clothing
Product:	abc	ABC Childrens Clothing
Job:	000028	Fashion Line Catalog Mailer
Component:	01	Fashion Line Catalog Mailer
Sales Class:	dir	Direct Mail Production
Est Desc:	Fashion Line Catalog Mailer	
Comp Desc:	Fashion Line Catalog Mailer	

New Estimate	Copy Source	Components/Quotes
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Creating an Estimate using the Copy Feature

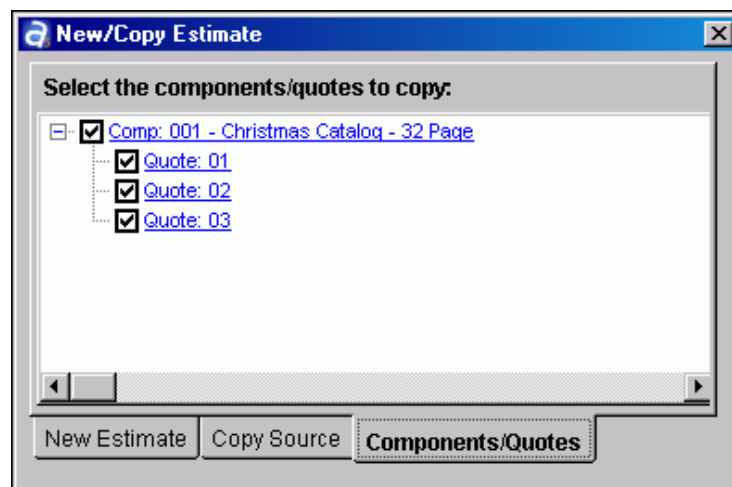
Creation of Estimates may be expedited by using the same robust copy features found throughout the Advantage applications. This is another way to improve efficiency and accuracy by minimizing manual input of data.

When using the Copy feature to create the estimate, it is helpful to filter by Job Type. Only the estimates with the same Job Type will be displayed. Other filter options include client, division and product. It also makes sense to check the “recalculate” option especially when copying estimates across clients. This ensures that estimate rates are recalculated based on the current client selection.



The "New/Copy Estimate" dialog box features a title bar with a blue 'a' icon and a close button. It contains several input fields: "Client:", "Division:", "Product:", "Job Type:" (with a dropdown menu showing "catles" and "Catalog - Less than 32 Pages"), and "Estimate:". Below these fields is a checked checkbox labeled "Recalculate?". At the bottom, there are three buttons: "New Estimate", "Copy Source", and "Components/Quotes".

Once the Estimate to copy is selected, choose which component to use and which quotes to include through the **Components/Quotes** Tab. The estimate, quotes and all details are created automatically and edits may be made as needed.



The "New/Copy Estimate" dialog box is shown with the "Components/Quotes" tab selected. The title bar remains the same. The main area is titled "Select the components/quotes to copy:" and contains a list of items with checkboxes: "Comp: 001 - Christmas Catalog - 32 Page" (checked), "Quote: 01" (checked), "Quote: 02" (checked), and "Quote: 03" (checked). At the bottom, the buttons are "New Estimate", "Copy Source", and "Components/Quotes".


Quotes

Every estimate has at least one quote. The quote represents the version being estimated. The Quote is the level at which all the detail is created. Quotes are created on the estimate automatically when generated from Job Specifications. When creating the estimate using other methods quotes may be added using several different options.

The first quote is created automatically after clicking on **ADD DETAIL**. An empty grid is displayed where other tools may be used to create the estimate detail (see section below called Developing Estimate Quote Detail).

The screenshot shows a software window titled "Estimate 000018-001". Inside, there's a sub-window for "Quote 002". The "Quote" field is set to "002" with the description "Black and White Version". Other fields include "Estimate: 000018 Summer Sale Print Ad", "Comp: 001 Summer Sale Print Ad", "Revision: 000", "Specs:", "Version:", "Qty:", "CPU: 0.000", "Job Budget: 5,000.00", "Quote Amount: 0.00", "Contingency: 0.00", and "Actual P.O.: 3,732.40". Below these fields is a table with columns: Function, Function Description, Detail Comments, Supplied By, Supplied By Notes, Quantity/Hours, Rate, and Extended Amount. The table is currently empty. At the bottom, there are tabs for "Detail", "Function Summary", and "Comments".

To add additional quotes, use either **Copy Quote** or **New Quote**:

- **Copy Quote** - From the Quote window, select a quote, click on the Copy button  and select Copy Quote. An identical copy of the quote with function detail will be created where quantities or other information can be changed or added.
- **New Quote** - Click on the New button and select New Quote to create a new, blank quote. Fill in the Quote description as desired.

The screenshot shows a software window titled "Quote 004". The "Quote" field is set to "004" with the description "v2 - Fashion line w/o sale 16 Pgs". Other fields include "Estimate: 000012 Fashion Line Catalog Mailer", "Comp: 001 Fashion Line Catalog Mailer", and "Quote: 004".


Developing Estimate/Quote Detail

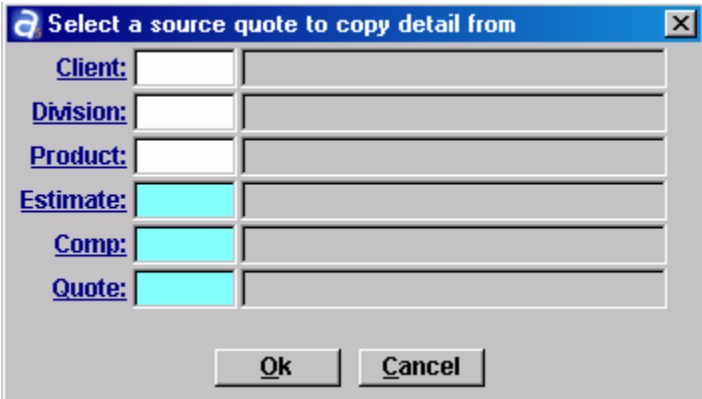
Advantage Estimating includes many features to help develop detailed and accurate estimates to present to your clients. The following tools and features are in place:

- Copy Quote Detail
- Estimate Preset Templates
- Manually inserting functions onto the estimate.
- Editing data on the grid.
- Automatic rate, markup and tax calculation.
- Reviewing actual charges posted to date in the Function Summary.
- Accessing vendor prices with the Vendor Pricing Sheets.
- Estimating with Job History.
- Linking to Job Specifications.
- Requesting and receiving Vendor Quotes.
- Cost per Unit calculation.

Copying Quote Detail

The ability to copy detail from one quote to another quote within the same Estimate or across Estimates is another useful feature. This feature is used after a quote shell has been created and details need to be added. Quote details from this estimate or other estimates may be copied.

From **within** a quote select the  button and the **Copy Quote Detail** drop down option will be displayed.



Select a source quote to copy detail from	
Client:	
Division:	
Product:	
Estimate:	
Comp:	
Quote:	
<div>Ok Cancel</div>	

In the **Select Quote to Copy Detail** window, enter the estimate number, estimate component number and the individual quote number to copy from. All details are copied for each function.


Creating New Estimates from Preset Templates

As mentioned earlier, Estimate Presets Templates expedite the estimate creation process and even help to ensure accuracy by including all the functions and other details that you won't want to miss.

As with most actions in Advantage there is more than one way to add function detail to a quote for an estimate. Next to copying, using the Estimate Presets is the fastest path to completing an Estimate.

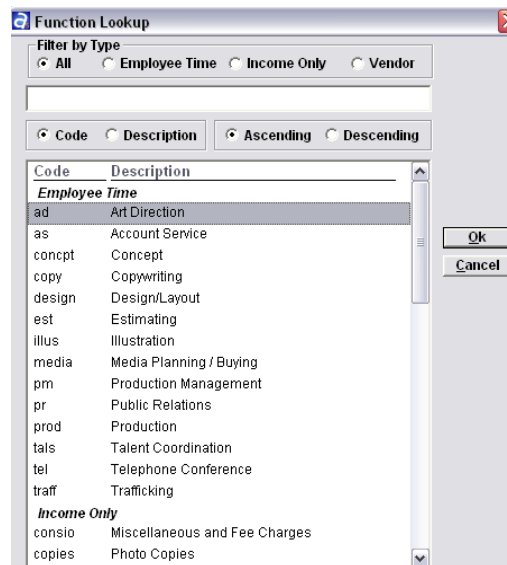
When an Estimate Preset is selected, all functions associated with the template are inserted in the quote. Functions may be added or deleted from the estimate grid afterwards but having the most detailed presets possible will help minimize the need to refine the detail later.

Preset Templates may be used multiple times and as needed. They can be used as building blocks. If an Estimate requires different phases or stages, the estimate preset template may be used to insert the related functions in groups as the estimate and job progress.

Click the  button and select the desired preset template code to load functions onto the grid. Edit as needed.

Manually inserting functions onto the estimate

The insert row and delete row buttons on the toolbar allow you to add or delete functions in the grid. When adding new functions in the grid, our unique selection list allows you to sort and filter the functions by type.



The same function may be used multiple times on the estimate grid. The main purpose of this feature is to allow for billing rate calculation for multiple employees on the same function. The functions are automatically rolled up on the estimate that is delivered to the client.

copy	Copywriting	<input type="checkbox"/>	ama	8.00	100.000	800.00
copy	Copywriting	<input type="checkbox"/>	rsc	20.00	175.000	3,500.00

Editing Data on the Grid

After data is inserted manually or automatically, you may move about the grid using the arrow keys to easily edit details for any function. Grid manipulation is similar to that of a standard spreadsheet program and makes editing a breeze.

Detail Comments	Supplied By	Supplied By Notes	Quantity/Hours	Rate	Extended Amount
				0.000	0.00
	mike		20.00	60.000	1,200.00
			20.00	125.000	2,500.00
mtg			15.00	125.000	1,875.00
rcs	Use Rick Smith		20.00	175.000	3,500.00
jtg			20.00	45.000	900.00
wab			2.00	50.000	100.00
			1.00	1,000.000	1,000.00
			20.00	10.000	200.00
hamil			5.00	750.000	3,750.00
			20.00	75.000	1,500.00
excel			50,000.00	0.630	31,500.00
mer			10.00	125.000	1,250.00

Automatic Rate, Markup and Tax Calculation / Non Billable Flag

As previously mentioned, function maintenance and the billing rate hierarchy play an important role in the calculations made on the estimate. Your database will contain settings specific to your client contracts and agency standards for billing flags, billing rates, markup and tax codes or percentages. For every function you enter manually or insert automatically (using any of the tools available), the correct rates and other settings will be made. Providing the default settings are correct, you (as the estimator) should not need to change these settings. However, if necessary, these default settings may be overridden on the estimate. Note that non-billable functions will be marked with an explanation point (in the gray record selector). It is important to know when you are creating an estimate using a non billable function.

Reviewing actual charges posted to date in the Function Summary

The function summary tab includes actual hours, vendor charges, open purchase orders and even billing that has occurred on the job. This information is extremely helpful when developing the estimate especially if work has already begun.

Vendor Pricing Sheets

Vendor Pricing Sheets may be accessed directly from the estimate detail grid and used to populate the rate. By simply entering the vendor code into the “Supplied By” field on the estimate grid, you are linked to their price list.

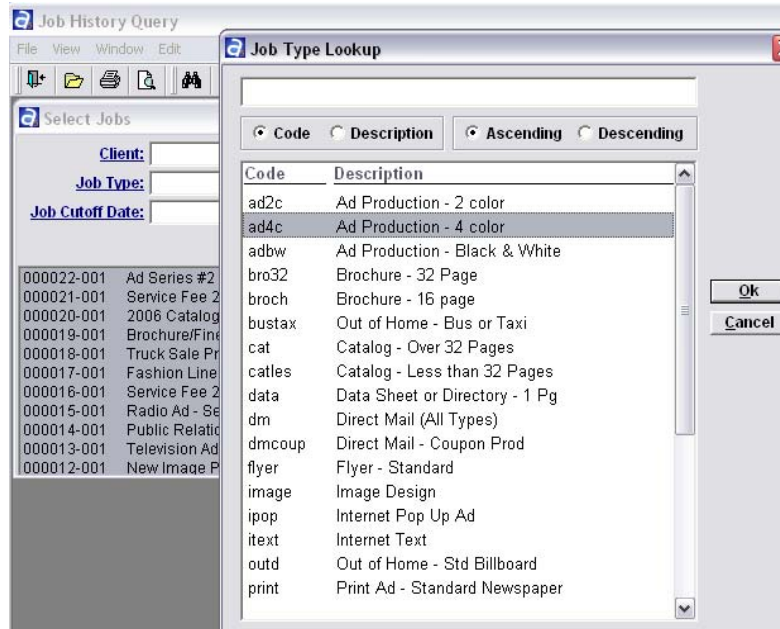
Double click on the RATE field for the row being worked on; the vendor’s price list will be displayed. Click on “Limit to Job Type” to see only the rates that apply to the type of job you are estimating. Select the correct rate based on the description and comments. It will be inserted into the quote detail automatically.

Vendor Pricing Lookup		
Description/Quantity	Unit - Rate	Comments
Job Type: cat - Catalog - Over 32 Pages		
Printing - Large Cat - 50,000 Qty	0.430	Negotiated Rate
Printing - Large Cat 100,000 Qty	0.390	Negotiated Rate
Job Type: caties - Catalog - Less than 32 Pages		
Printing - Small Cat - 100,000 Qty	0.510	Negotiated Rate
Printing - Small Cat - 50,000 Qty	0.630	Negotiated Rate
Printing Small Cat - 30,000 Qty	0.750	Negotiated Rate

Estimating with Job History

Job History is available (as of v5.60) to help create estimate detail based on historical information. This feature is designed to facilitate more accurate estimates by providing an average of actual charges accumulated on similar jobs (based on job types) done within a specified period of time for all clients or a selected client. Individual jobs may be deselected and excluded from the average.

From within a quote, select Tools / Job History. You'll then have the opportunity to generate job history data based on your selections. Enter a client code, job type and job cut off date. Include only closed jobs or all jobs.



Based on the selections made, the Job History (Function Averages) screen will be displayed. The grid includes a complete breakdown of all charges by function. View quoted and actual totals for each function with variance. See where items were either under or over quoted in the past.

Job History (Function Averages by Job)							
Function Description	Function Type	Actual Qty/Hrs	Actual Amount	Actual Markup	Actual Tax	Actual Total	Non Billable Total
Deliveries	V	0.00	60.00	1.77	0.00	61.77	0.00
Production	E	0.17	20.83	0.00	0.00	20.83	0.00
Printing	V	0.00	0.00	0.00	0.00	0.00	0.00
Media Planning / Buying	E	0.50	62.50	0.00	0.00	62.50	0.00
Film Output	V	0.33	166.67	29.42	0.00	196.08	0.00
Estimating	E	0.00	0.00	0.00	0.00	0.00	0.00
Concept	E	0.33	41.67	7.35	0.00	49.02	0.00
Design/Layout	E	0.00	0.00	0.00	0.00	0.00	0.00
Photography	V	0.33	266.67	47.07	0.00	313.73	0.00
Laser Output	I	0.33	3.33	0.59	0.00	3.92	0.00
Production Management	E	0.00	0.00	0.00	0.00	0.00	0.00
Account Service	E	15.33	1,533.33	0.00	0.00	1,533.33	0.00
Art Direction	E	0.83	83.33	0.00	0.00	83.33	0.00
Copywriting	E	0.00	0.00	0.00	0.00	0.00	0.00
Totals:		18.17	2,238.33	86.19	0.00	2,324.51	0.00

Summary Job List

Select the “Job List” to review details on each job included in the average. By clicking on a job, the full Quote vs. Actual details for that job will be displayed for review.

Job History (Function Averages by Job)	
000027-001	Fashion Line Catalog Mailer
000019-001	Brochure/Fine Living Line
000017-001	Fashion Line Catalog Mailer
000004-001	Brochure/Bedroom Line

Click on a single job to drill down to that job’s individual Quote vs. Actual data!

Job: 000017-001 - Fashion Line Catalog Mailer Office: main - Main Office							
Function Description	Function Type	Quoted Qty/Hrs	Quoted Amount	Quoted Markup	Quoted Tax	Quoted Total	Actual Qty/Hrs
Deliveries	V	0.00	0.00	0.00	0.00	0.00	0.00
Talent	V	0.00	0.00	0.00	0.00	0.00	0.00
Film Output	V	1.00	1,000.00	176.50	0.00	1,176.50	0.00
Estimating	E	2.00	100.00	0.00	0.00	100.00	0.00
Photography	V	5.00	3,750.00	661.88	0.00	4,411.88	0.00
Production	E	10.00	1,250.00	0.00	0.00	1,250.00	0.00
Concept	E	15.00	1,875.00	0.00	0.00	1,875.00	8.75
Laser Output	I	20.00	200.00	35.30	0.00	235.30	0.00
Design/Layout	E	20.00	900.00	0.00	0.00	900.00	0.00
Art Direction	E	20.00	1,200.00	0.00	0.00	1,200.00	3.50
Production Management	E	20.00	1,500.00	0.00	0.00	1,500.00	0.00
Account Service	E	20.00	2,500.00	0.00	0.00	2,500.00	10.50
Copywriting	E	20.00	3,500.00	0.00	0.00	3,500.00	9.50
Printing	V	100,000.00	51,000.00	9,001.50	0.00	60,001.50	5,000.00
Totals:		100,153.00	68,775.00	9,875.18	0.00	78,650.18	5,032.25

Summary Detail Billing

Linking to Job Specifications

If the Estimate/Quote was not generated from the Job Specifications but specifications exist for the job, it may be beneficial to link them to the estimate/quote. Job specification information is used on reports and when creating Vendor Quote Requests.

Vendor Quotes

Vendor Quotes are available to prepare requests to be sent to a Vendor or multiple Vendors for quotes based on job specifications and functions. The application stores a history of all requests made and all replies received. The options approved may be used in the estimate grid but are also stored for future reference.

Vendor Quotes are created through an existing Estimate (approved or not) and the related Job Specifications may be inserted into the request automatically (if linked to the estimate).

When a Vendor Quote Request is created a unique number is assigned that is a combination of the estimate number, the component number for which the quote is for and the Vendor Quote number followed by the Estimate Component description. This combination results in the **RFQ** (Request for Quote) number that is used. A completed **RFQ** can be printed and mailed or saved as a PDF and emailed automatically to the vendor from within the application.

Accessed directly through the Estimating application Vendor Quote Requests completely automates requests for quotes from Vendors. Basic steps and features include:

- A “wizard” to build the requests for multiple quotes, functions and vendors using common information in a snap.

Quote Nbr	Quote Description
<input checked="" type="checkbox"/> 001	v1 - Fashion line with sale 30 Pgs
<input checked="" type="checkbox"/> 002	v1 - Fashion line with sale 30 Pgs
<input checked="" type="checkbox"/> 003	v2 - Fashion line w/o sale 16 Pgs
<input checked="" type="checkbox"/> 004	v2 - Fashion line w/o sale 16 Pgs

- **A variety of options for adding details about the request.**

Quote (version) and Function details are repeated for each vendor.

New Vendor Quote Request (RFQ)

Vendor: Excellent Printing Company Status: Created

Contact: Jason Cannon

Address:

E-Mail Address: jcannon@excellent.com

Notes To Vendor:

Due Date: Response Date: RFQ Submitted:

Quote: 001 Quote Memo/Specs:

Desc: v1 - Fashion line with sale 30 Pgs

Function: print Function Notes:

Desc: Printing

Quantity	Rate	Amount
50,000	0.000	0.00

Reply Notes:

Detail Memo/Specs Approval Summary

- **Direct access to Job Specifications** – Automatically insert Job Specifications onto the vendor quote request and edit as needed. Select the entire specification or sections (based on tabs).
- Avoid miscommunication by including detailed job specifications from the Job Jacket.
- Add additional comments to the job specifications.

Spec Selection

General Information

Stock

Special Instructions

Ink

Full color.

Size Flat

Standard catalog size.

Size Folded

No folding.

Number of Pages: 30

Number of Sheets: 17

Special Instructions

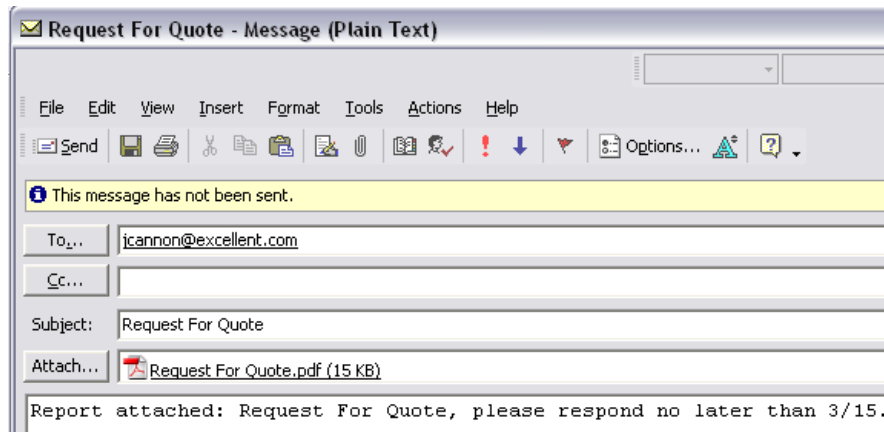
Score:

Fold:

Punch:

Select Quote Select Categories/View Specs

- **Print and automatically Email a PDF of the Quote Request to each vendor.**



- **Track quote requests and replies on a summary tab.**
 - The Vendor Quote application tracks vendor quotes from creation through approval.
 - Review the quote request status from a single interface. Vendors are shown side-by-side.

RFQ 000012-001-001 - Fashion Line Catalog Mailer					
		Vendors:			
		excel - Excellent Printing Company		pshop - Print Shop Printers	
Quote	Function	Description	Status	Status	
1	print	Printing	Created	Created	
2	print	Printing	Created	Created	
3	print	Printing	Created	Created	
4	print	Printing	Created	Created	

- Enter replies for each vendor along with comments.

Quantity	Rate	Amount	Reply Notes:
50,000	0.980	49,000.00	This is the best price I can give you for the quantity specified. If you print more, I can give you a better price.

Approve Vendor Quotes.

The Approval tab displays each Vendor Quote Request with reply information. Check on one or many items and optionally insert the function, supplied by and rate information into the associated estimate grid. One or more vendors may be approved to perform a single function if desired. A function will be entered for each vendor/function selected.

RFQ 000012-001-001 - Fashion Line Catalog Mailer

Estimate Quote: 001 - v1 - Fashion line with sale 30 Pgs				Function: print - Printing		
Vendor	Quantity	Rate	Amount	Appr	Approved By	Approval Notes
... excel - Excellent Printing Company	50,000	0.98	49,000.00	<input checked="" type="checkbox"/>		
... pshop - Print Shop Printers	50,000					- No response -
Estimate Quote: 002 - v1 - Fashion line with sale 30 Pgs				Function: print - Printing		
Vendor	Quantity	Rate	Amount	Appr	Approved By	Approval Notes
... excel - Excellent Printing Company	100,000	0.00	0.00	<input type="checkbox"/>		
... pshop - Print Shop Printers	100,000					- No response -
Estimate Quote:						
Vendor	Quantity	Rate	Amount	Appr	Approved By	Approval Notes
... excel - Excellent Printing Company	100,000	0.00	0.00	<input type="checkbox"/>		
... pshop - Print Shop Printers	100,000					- No response -

advantage

Would you like to insert the approved items into the estimate quotes?

Yes No

Cost Per Unit (CPU)

The Grand Total on a job is not the only consideration when developing an estimate. The Cost per Unit calculation allows you to use that information to build the estimate based on a target goal and include that information on your client's estimate. You select which functions to factor into the CPU; the calculation is automatic.

Quote	Description	Rev	Amount	Quantity	CPU	Approved By
Quote 001	32 page Annual Report (qty 2000)	1	15,431.38	2,000	7.716	
Quote 002	32 page Annual Report (qty 3000)	1	18,960.88	3,000	6.320	

Revision: 001

Specs:

Version: 1

Revision: 0

Qty: 2,000

CPU: 7.716

Other Tools


Several other tools for assembling and viewing the information on an estimate in a logical manner are provided.

Comments

The Estimating application has a wide variety of comments at every level to help you describe the estimate and keep track of important information. Comments are printed on estimate forms, client invoices and various reports. Comments can be found at the following levels:

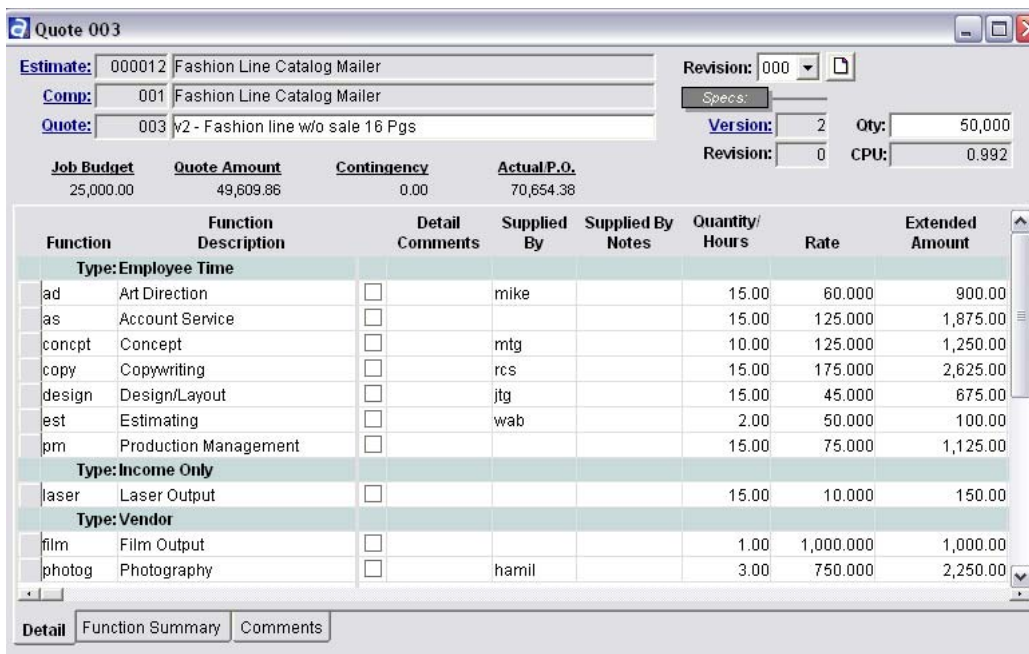
- Estimate
- Estimate Component
- Estimate Quote
- Estimate Revision
- Estimate Function

Sort Options

Accessed from the toolbar, the Sort button  offers four distinct views of the Estimate details. The sort option may be saved for the individual estimate. Sort options include:

- Function Code
- Consolidation Code.
- Function Type
- Function Heading

Below is an example of the sort option “Function Type”:



Quote 003

Estimate: 000012 Fashion Line Catalog Mailer
Comp: 001 Fashion Line Catalog Mailer
Quote: 003 v2 - Fashion line w/o sale 16 Pgs

Revision: 000
Version: 2
Qty: 50,000
Revision: 0
CPU: 0.992

Function	Function Description	Detail Comments	Supplied By	Supplied By Notes	Quantity/Hours	Rate	Extended Amount
Type: Employee Time							
ad	Art Direction		mike		15.00	60.000	900.00
as	Account Service				15.00	125.000	1,875.00
concept	Concept		mtg		10.00	125.000	1,250.00
copy	Copywriting		rsc		15.00	175.000	2,625.00
design	Design/Layout		jtg		15.00	45.000	675.00
est	Estimating		wab		2.00	50.000	100.00
pm	Production Management				15.00	75.000	1,125.00
Type: Income Only							
laser	Laser Output				15.00	10.000	150.00
Type: Vendor							
film	Film Output				1.00	1,000.000	1,000.00
photog	Photography		hamil		3.00	750.000	2,250.00

Detail Function Summary Comments

Quote Comparisons

For any given Estimate, multiple quotes may be created to present your client with various options. When the time comes to compare quotes side by side, Advantage Estimating once again provides an easy on-screen display specifically for that purpose. Click on the Quote Comparison tab from the Estimate header window. An unlimited number of quotes may be displayed and include function totals and grand totals.

		Quote Nbr: 1	Quote Nbr: 2	Quote Nbr: 3	Quote Nbr: 4
Function Code	Function Description	v1 - Fashion line with sale 30 Pgs	v1 - Fashion line with sale 30 Pgs	v2 - Fashion line w/o sale 16 Pgs	v2 - Fashion line w/o sale 16 Pgs
ad	Art Direction	1,200.00	1,200.00	900.00	900.00
as	Account Service	2,500.00	2,500.00	1,875.00	1,875.00
concept	Concept	1,875.00	1,875.00	1,250.00	1,250.00
copy	Copywriting	3,500.00	3,500.00	2,625.00	2,625.00
design	Design/Layout	900.00	900.00	675.00	675.00
est	Estimating	100.00	100.00	100.00	100.00
film	Film Output	1,176.50	1,176.50	1,176.50	1,176.50
laser	Laser Output	235.30	235.30	176.48	176.48

Estimate Quotes



Comments

Quote Comparison

Vendor Quote Requests

Revision Tracking

Revisions are used to track changes made to the estimate. Revisions may be created automatically (based on the Agency setting) any time a change is made to a saved estimate. The most common method is the manual revision. Revisions are created when changes occur on the project requiring an updated (revised) estimate be sent to the client for approval. Creating a revision is simple, just click on the new revision button or select the “new” button on the toolbar. Either option will prompt the creation of an exact copy of the original revision where changes can then be made.

Revision: 000  

The highest revision is always displayed, but earlier revisions may be viewed by selecting them from the revision drop down window.

Printing and Delivering the Estimate

Customizing the Printed Form

When it comes to finalizing the Estimate and preparing a form to be sent to the Client for approval, the same vigorous controls exist that are seen throughout Advantage.

Customization of the Estimate form

- Controls for preparing the Estimate include the ability to submit using one of four different formats.
- **One Quote per Page** displays a single quote on one page with signature lines for representatives from the Agency and the Client.
- **Side by Side Quote** displays multiple quotes side-by-side giving the client multiple options on a single page.
- **Revision Comparison** displays multiple revisions side-by-side illustrating for the client the evolution of the job in terms of revisions they requested.
- **Revision Comparison w/Variance** displays multiple revisions side-by-side with a variance and a column for the final, actual costs. This version is most useful as a follow up to the original estimate after the job is complete.

The screenshot shows the 'Select' dialog box in the Advantage software. It has a title bar with the 'a' logo and the word 'Select'. Below the title bar is a toolbar with icons for file operations. The main area is divided into several sections:

- [Report Format]**: A list box containing four options: '001 - One Quote per Page', '002 - Side by Side Quote', '003 - Revision Comparison', and '004 - Revision Comparison w/Variance'. '001 - One Quote per Page' is selected.
- Select By**: A group box containing two radio buttons: 'Estimate' (selected) and 'Job'.
- [Office]**: A list box containing three options: 'indy - Indianapolis Office', 'main - Main Office', and 'nc - North Carolina'. 'main - Main Office' is selected.
- Location / Logo**: A section with two text boxes. The first is labeled 'Location ID:' and contains the text 'main'. The second is labeled 'Logo Name:' and contains the text 'C:\ADVAN550\advantage_header.bmp'.
- Item List**: A list box at the bottom containing several items, each with a checkbox. The first item is '000012 - Fashion Line Catalog Mailer - abc - abc - abc' and is checked. Below it are four sub-items, each also checked: '01 - Fashion Line Catalog Mailer', '04 - v2 - Fashion line w/o sale 16 Pgs', '03 - v2 - Fashion line w/o sale 16 Pgs', '02 - v1 - Fashion line with sale 30 Pgs', and '01 - v1 - Fashion line with sale 30 Pgs'.

Estimate Selection includes the option to filter by office and select individual estimates. Individual selection of the estimate quotes is also available and is used to customize the estimate output.

Further customization includes the ability to select a location and logo, address header and footer information along with many other print options:

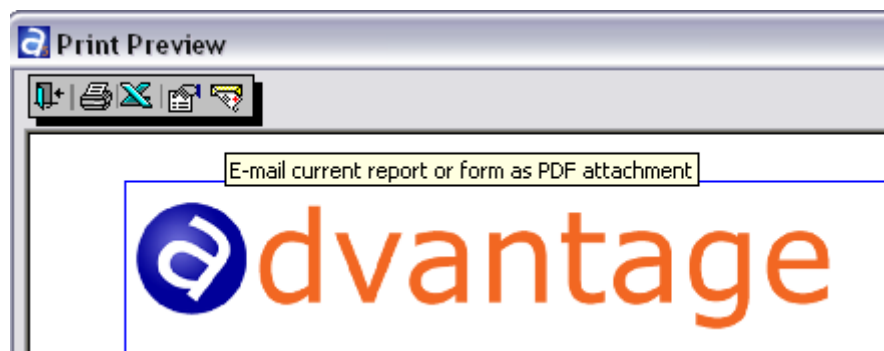
The 'Select' window is a configuration interface with a toolbar at the top containing icons for print, save, and other functions. The main area is divided into several sections:

- Save Selections as Defaults:** A checked checkbox.
- Don't Override Date:** A text field containing '3/16/2006' and an unchecked checkbox.
- Function Options:** A group box with three radio buttons: 'Function Code' (selected), 'Consolidation Code', and 'Total Only'.
- Tax Options:** Two unchecked checkboxes: 'Show Tax Separately' and 'Indicate Taxable Functions'.
- Comm / Markup Options:** Two unchecked checkboxes: 'Show Comm/MU Separately' and 'Indicate Comm/MU Functions'.
- Group By:** A group box with four radio buttons: 'None', 'Function Type' (selected), 'Function Heading', and 'Inside/Outside'.
- Sort By:** A group box with two radio buttons: 'Function Code' (selected) and 'Function Order'.
- Address Block Options:** Two unchecked checkboxes: 'Print Division Name' and 'Print Product Name'.
- Comment Options:** A group box with five checkboxes: 'Estimate Comment' (checked), 'Estimate Component Comment', 'Quote Comment', 'Revision Comment', and 'Function Comment'.
- Other:** A group box with seven checkboxes: 'Client Reference', 'AE Name' (checked), 'Sales Class' (checked), 'Specs', 'Estimate Quantity', 'Include Contingency', 'Suppress Zero Functions', 'Include Nonbillable', and 'Include Qty/Hrs'.
- Default Footer Comment:** A checked checkbox with a text area containing the text: 'Estimate is valid +- 10%. All revisions and changes will be quoted separately.'

At the bottom, there are two tabs: 'Selection' and 'Print Options'.

Email Directly From the Estimating Application

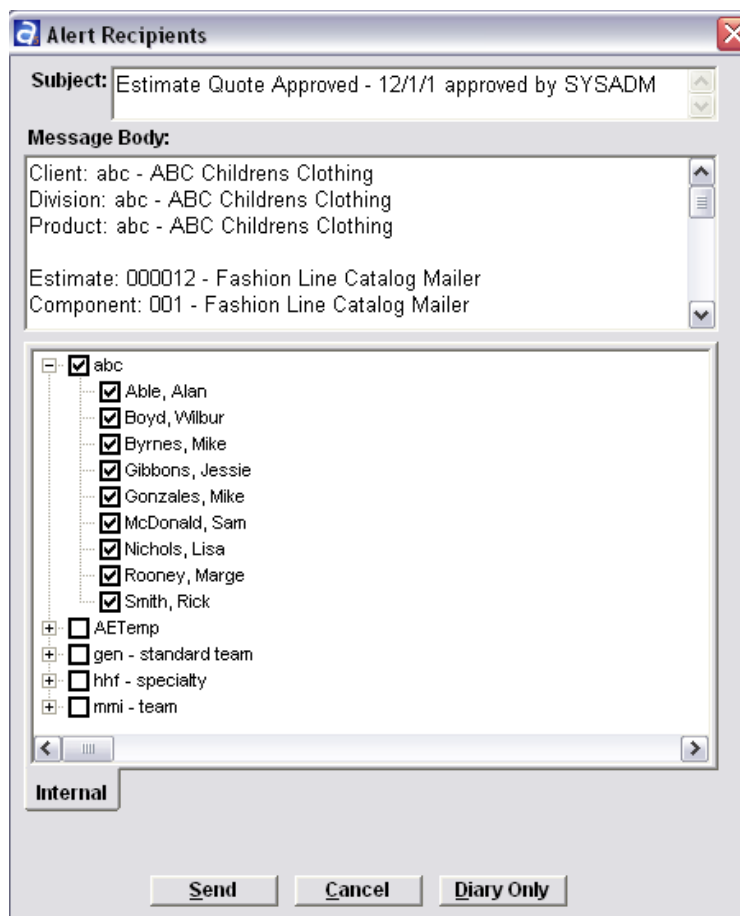
Printing and mailing an Estimate to a Client is not the only way to send a completed Estimate. The same Auto Email PDF capability discussed earlier in Vendor Quotes also exists in the Estimate application. After viewing the estimate, click on the "Email" button to start the process. A PDF is generated and attached to an email ready for you to send.



Alerts

As in all areas of the system, Advantage keeps your team “in the loop” by sending an Alert or Email to when important events occur on the estimate. Events include (all are optional):

- Estimate/Quote Created
- Estimate/Quote Revised
- Estimate/Quote Approved
- Estimate/Quote Modified



The "Alert Recipients" dialog box is shown. It has a title bar with a close button. The "Subject:" field contains "Estimate Quote Approved - 12/1/1 approved by SYSADM". The "Message Body:" field contains the following text: "Client: abc - ABC Childrens Clothing", "Division: abc - ABC Childrens Clothing", "Product: abc - ABC Childrens Clothing", "Estimate: 000012 - Fashion Line Catalog Mailer", and "Component: 001 - Fashion Line Catalog Mailer". Below the message body is a list of recipients. The "abc" group is expanded and checked, showing a list of individuals: Able, Alan; Boyd, Wilbur; Byrnes, Mike; Gibbons, Jessie; Gonzales, Mike; McDonald, Sam; Nichols, Lisa; Rooney, Marge; and Smith, Rick. Below this list are four other groups: AETemp, gen - standard team, hhf - specialty, and mmi - team, each with a plus sign icon. At the bottom left is a tab labeled "Internal". At the bottom right are three buttons: "Send", "Cancel", and "Diary Only".

Alert Recipients

Subject: Estimate Quote Approved - 12/1/1 approved by SYSADM

Message Body:

Client: abc - ABC Childrens Clothing
Division: abc - ABC Childrens Clothing
Product: abc - ABC Childrens Clothing

Estimate: 000012 - Fashion Line Catalog Mailer
Component: 001 - Fashion Line Catalog Mailer

☒ abc

- ☒ Able, Alan
- ☒ Boyd, Wilbur
- ☒ Byrnes, Mike
- ☒ Gibbons, Jessie
- ☒ Gonzales, Mike
- ☒ McDonald, Sam
- ☒ Nichols, Lisa
- ☒ Rooney, Marge
- ☒ Smith, Rick

☐ AETemp

☐ gen - standard team

☐ hhf - specialty

☐ mmi - team

Internal

Send **Cancel** **Diary Only**