



## 10 Step Guide to Quote Creation



# STEP 1

## Dashboard: Create/Open Job

1. Select New Project or
2. Open existing Job (Lead from WeOpportunity) by double clicking at Job level "J1".

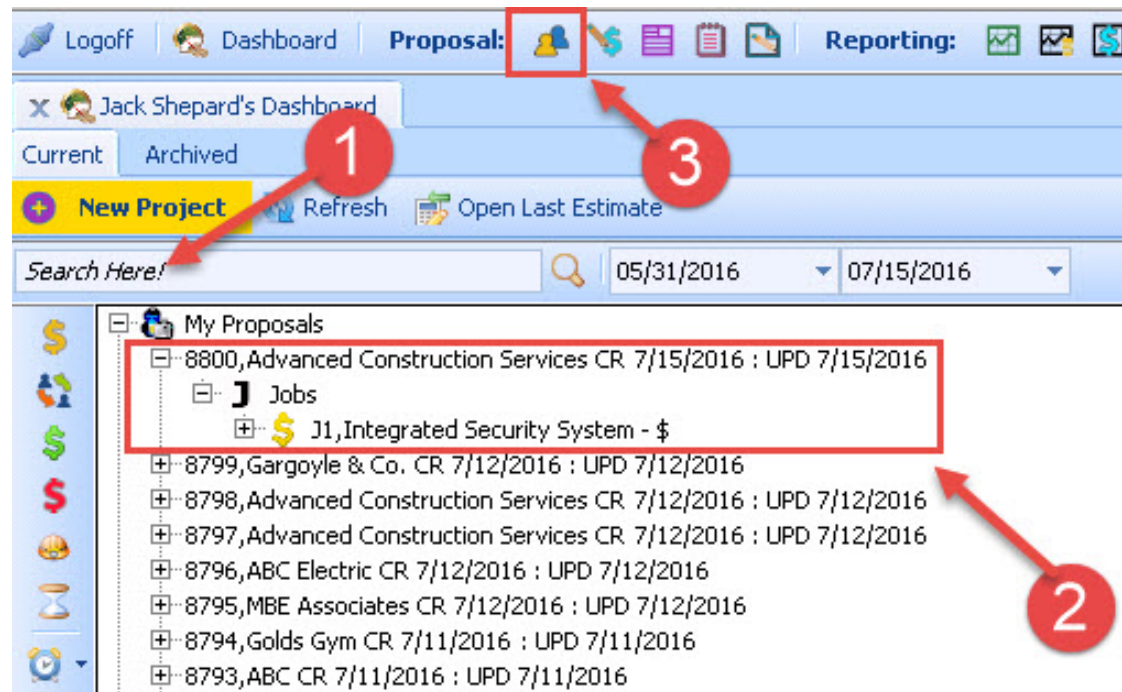
The screenshot displays the WeSuite dashboard interface. At the top, there is a navigation bar with options: Logoff, Dashboard (highlighted with a red box), Proposal: (with icons for user, currency, calendar, and document), Reporting: (with icons for chart, camera, and currency), Tools (with a wrench icon), and Help (with a question mark icon). Below the navigation bar is a breadcrumb trail: X Jack Shepard's Dashboard. There are two tabs: Current and Archived. A yellow button labeled 'New Project' is highlighted with a red box and a red arrow pointing to it, with a red circle containing the number '1' next to the arrow. Below the tabs is a search bar labeled 'Search Here!' with a magnifying glass icon, and two date dropdown menus showing '05/31/2016' and '07/15/2016'. The main content area shows a tree view of 'My Proposals'. Under 'Jobs', the item 'J1, Integrated Security System - \$' is highlighted with a red box and a red arrow pointing to it, with a red circle containing the number '2' next to the arrow. Other items in the list include '8800, Advanced Construction Services CR 7/15/2016 : UPD 7/15/2016', '8799, Gargoyle & Co. CR 7/12/2016 : UPD 7/12/2016', '8798, Advanced Construction Services CR 7/12/2016 : UPD 7/12/2016', '8797, Advanced Construction Services CR 7/12/2016 : UPD 7/12/2016', '8796, ABC Electric CR 7/12/2016 : UPD 7/12/2016', '8795, MBE Associates CR 7/12/2016 : UPD 7/12/2016', '8794, Golds Gym CR 7/11/2016 : UPD 7/11/2016', and '8793, ABC CR 7/11/2016 : UPD 7/11/2016'.



## STEP 2

# WeEstimate: Estimate from Lead

1. Search for Opportunity at Dashboard, open to Job level.
2. Double click on Job 1 level to open to the Estimate screen.
3. Start step 3 to create Folders.
4. Reminder: go to Customer Information screen to include Billing Address and confirm Contact information.



### NOTE:

If the Estimate being created is **NEW** from WeEstimate, skip to Step 2A (next slide).



## STEP 2a

# WeEstimate: New Job Screen

1. Search for Customer, enter name and select “go”.
2. Select Customer or create new, select Site & Billing Addresses or create new below.
3. Search for Contact or add new.
4. Name Sales Folder and Job, fill in/select appropriate and required Fields.
5. When check mark is “green” select Continue.

Starting a New Project

Step 1: Customer Information

ABC Electric

Use Default Customer  Quote Directly to Contractor

Customers

- ABC Electric (10049)
- ABC Electric: 100 Washington Ave
- ABC Electric: 100 Washington Ave
- ABC Electric: 100 Washington Ave
- Bill To: 123 Main Street

Using Existing Customer

Customer: ABC Electric (10049)

Site: 100 Washington Ave

Billing: 100 Washington Ave

Contact: Raymond Balde - ABC Electric

Step 2: Estimate Information

Job Description

Access Control System

Where are you Quoting? (Rates)

New York - Metro Region

Market

Corporate

Job Type

New Commercial

System Type

Access

Type of Sale

Negotiated Sale

Project Engineer

Pending Contract (Right Click to Reset)

Go To:

Estimate

Required to Continue

Cancel Continue

### NOTE:

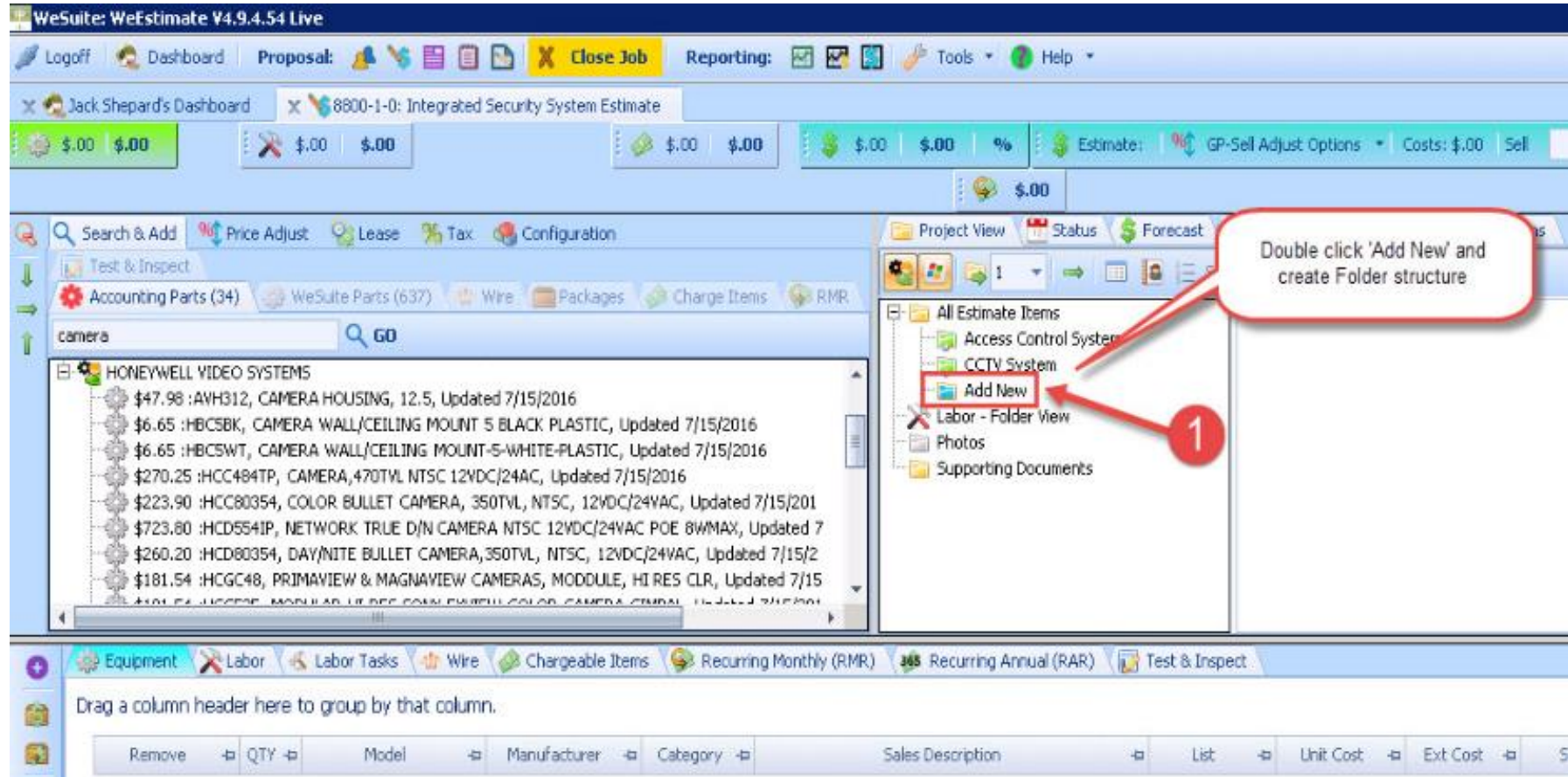
This step is only required if creating a **NEW** Estimate in WeEstimate without a Lead from WeOpportunity.



# STEP 3

# Estimate Screen: Create Folders

1. Project View - double click on "Add New" to name and create Folders for the Estimate.







# STEP 4

# Estimate Screen: Add Parts

1. Search for Parts at Accounting Parts tab.
2. Drag and drop Parts from results window to appropriate Estimate Folders.
3. Bill of Materials will build on lower half of screen.

The screenshot shows the WeSuite software interface. At the top, there's a navigation bar with 'Logoff', 'Dashboard', 'Proposal', 'Close Job', 'Reporting', 'Tools', and 'Help'. Below that, a status bar shows 'Jack Shepard's Dashboard' and '8800-1-0: Integrated Security System Estimate'. A financial summary bar displays various dollar amounts: \$1,389.95, \$1,430.00, \$0.00, \$0.00, \$2,882.51, \$5,007.89, 42.44%, and \$0.00. The main interface is divided into several sections. On the left, there's a search bar with 'camera' entered. Below it, a list of 'Accounting Parts' is shown, including items like 'AVH312, CAMERA HOUSING, 12.5, Updated 7/15/2016' and 'HCC484TP, CAMERA, 470TVL NTSC 12VDC/24VAC, Updated 7/15/2016'. A red circle with the number '1' is around the search bar, and a red circle with the number '2' is around the selected item. On the right, there's a tree view of the estimate structure, showing folders like 'All Estimate Items', 'Access Control System', and 'CCTV System'. A red arrow points from the selected item in the search results to the 'CCTV System' folder. At the bottom, there's a table with columns: Remove, QTY, Model, Manufacturer, Category, Sales Description, List, and Unit Cost. The table contains three rows of data:

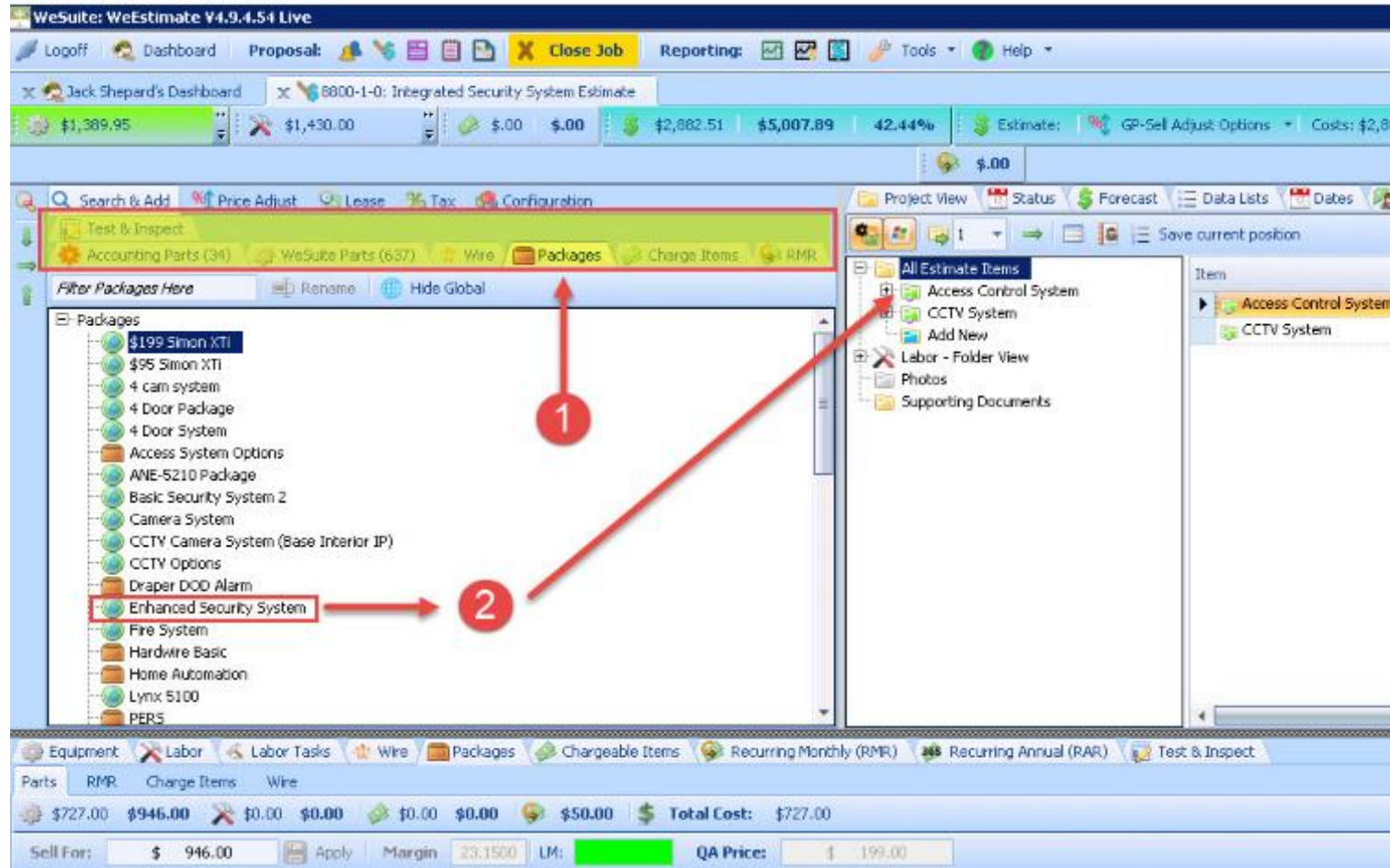
Remove	QTY	Model	Manufacturer	Category	Sales Description	List	Unit Cost
+ ▶	4.00	HBC5BK	HONEYWELL VIDE	None	CAMERA WALL/CEILING MOUNT 5 BLACK PLASTIC	\$0.00	\$6.65
+ ▶	6.00	HCC80354	HONEYWELL VIDE	None	COLOR BULLET CAMERA, 350TVL, NTSC, 12VDC/24VAC	\$0.00	\$223.90
+ ▶	3.00	HBC5WT	HONEYWELL VIDE	None	CAMERA WALL/CEILING MOUNT-5-WHITE-PLASTIC	\$0.00	\$6.65



# STEP 5

# Add Other Items

1. Select the Tab to search and add: Packages, Chargeable Items and/or RMR items.
2. Drag and drop items from the results window to the appropriate Estimate Folders.





# STEP 6

# Add Labor

1. Select the Labor Tab.
2. Labor Tab: Add/edit Labor hours at Add Qty column for each Labor Category.
  - a) Labor may come in with selected parts (depends on your database). Hours from parts at the BOM will show at the QTY column on the Labor Grid.
  - b) You may also add labor at the Line Item (BOM) by clicking on the +.
  - c) You may enter Labor at the Labor Grid "Add QTY" column.

The screenshot shows the WeSuite software interface. The top navigation bar includes 'Logoff', 'Dashboard', 'Proposals', 'Close Job', 'Reporting', 'Tools', and 'Help'. The main window displays a project estimate for '8800-1-0: Integrated Security System Estimate'. The 'Labor' tab is selected, showing a 'Hours Schedule' for 'All Estimate Items\Access Control System'. A table below the schedule shows labor categories and their associated costs. A red circle '1' points to the 'Add QTY' column header, and a red circle '2' points to the '+' button in the 'Add QTY' column of the first row.

Folder	Category	QTY	Add QTY	Total QTY	Est	Sell	GPM	Total Cost
Grand Summaries								
		Sum = 14.00	Sum = 0.00	Sum = 14.00				Sum = \$770.00
Access Control System	Installation	14			\$55.00	\$75.00	26.67	\$770.00
Access Control System	Prevailing Wage				\$55.00	\$75.00	26.67	\$0.00
Access Control System	Project Mgmt				\$45.00	\$70.00	35.71	\$0.00
Access Control System	Technical Service				\$50.00	\$100.00	50	\$0.00

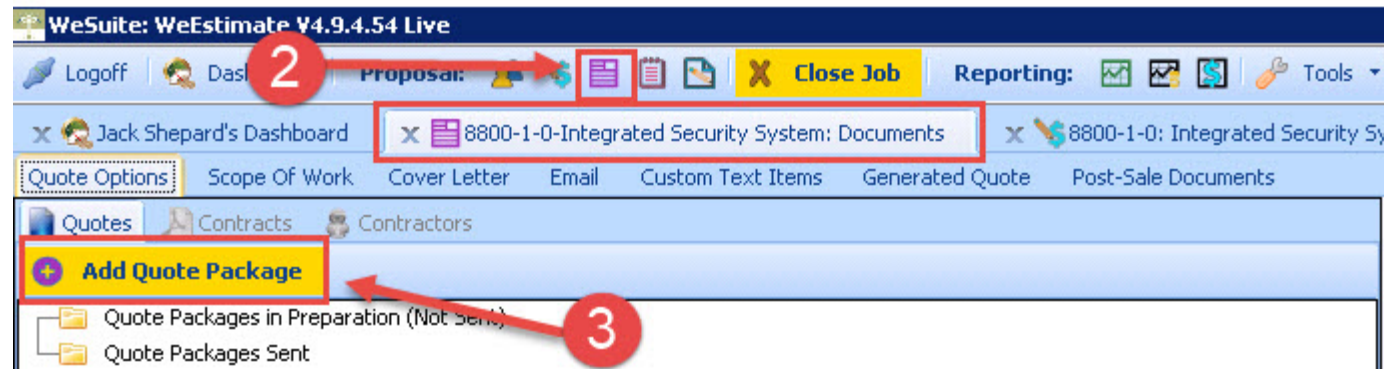
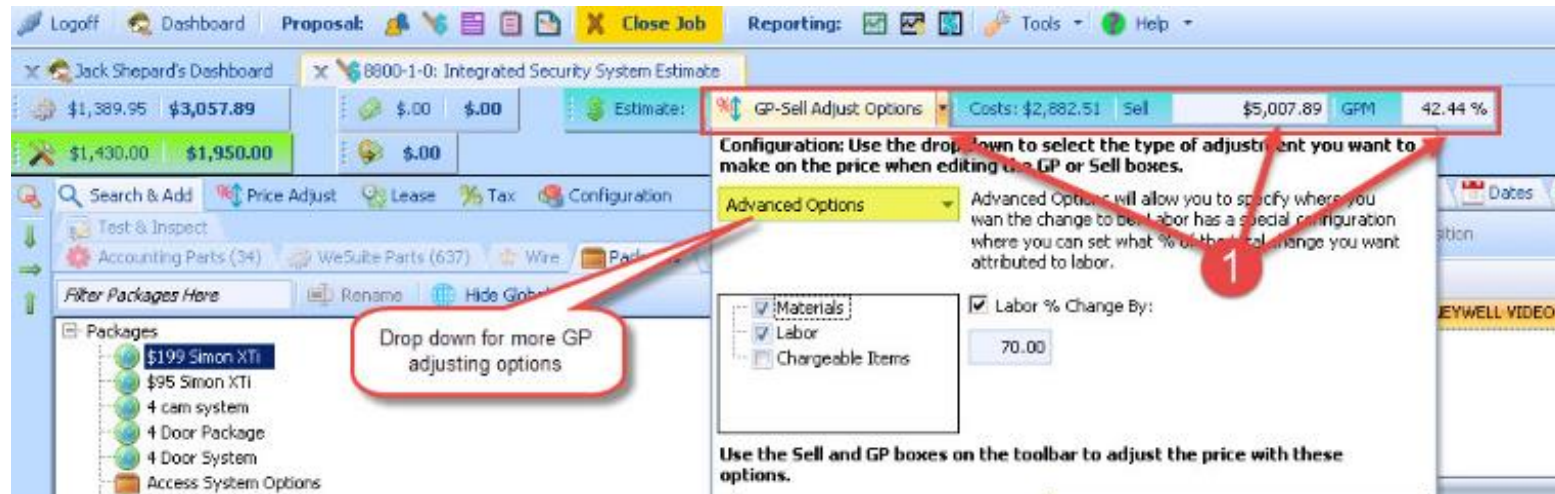




# STEP 7

# Create Documents

1. Adjust total Sale Price or Gross Profit at Price Adjust Tool Bar, Estimate Screen.
2. Select Document Screen icon to move to Document Screen.
3. Click on Add Quote Package to start Proposal creation.





# STEP 8

# Documents Proposal

3. At New Quote Package pop up, change Cover Page Project Title if desired.
4. Select Continue.
5. Select Appropriate Check Boxes or Template.

Adding a New Quote Package

First, Select a Template for your Quote Document:

Proposal Document Templates

What would you like to name your Quote Document?

Integrated Security System

If you are using a Cover Page what is the Project Title?

Integrated Security System

Would you like this new Quote Document to be a Copy of an Existing one?

Cancel Continue

Annotations: A red circle with the number 3 points to the Project Title input field. A red circle with the number 4 points to the 'Continue' button.

Quote Options Contract Options Contractor Options

Templates My Favorite Proposal Template Maintenance

Proposal Pages

- Cover Page
- Cover Letter
- Corporate Profile
- Key Associates
- Products and Services
- Project Description
- Project Investment
- Project Investment Summary
- Project Acceptance
- Project Exclusions
- Terms and Conditions
- Project References
- Short Form

Custom Options

Template Type

- Andromeda Blue
- Gossamer Orange
- Popeye Spinach Green
- Grimace Purple

Category

Equipment

- Display
  - Show Equipment
  - Display Full Line Items
  - Display Qty & Description Only
  - Display Location
  - Include Unit Sell Price
  - Include Extended Sell Price
  - Include Total on Folder's Header
  - Include Discount in Subtotal
- Sort
  - By Manufacturer
  - By Part Number
  - By Description
  - By Unit Sell Price

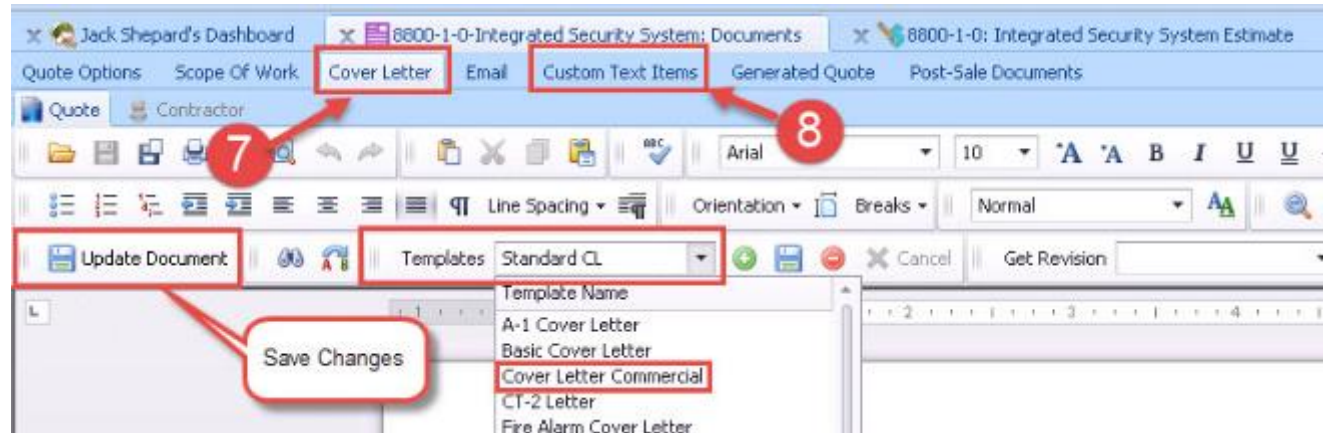
Annotations: A red circle with the number 5 points to the 'Template Maintenance' button. A red callout box labeled 'Proposal Pages' points to the Proposal Pages section. Another red callout box labeled 'Pricing Break out, Equipment, Charge Items,' points to the 'Display' sub-section under 'Equipment'.



# STEP 9

# Documents: Scope of Work & Cover Letter

6. Select Scope of Work Tab. Set font, size and type scope or create/use an SOW template from the drop down (if any).
7. Select Cover Letter. Type body of letter or select from Templates (if any).
8. Select Custom Text Items and fill out the appropriate Custom Text Items.





# STEP 10

# Documents: Generate Quote

9. Select “Generate Quote”
10. Proposal will show. Review, print (and select flag as sent) or email to Customer.
11. Under Quote Packages Sent – quotes emailed or flagged as sent will show.

The screenshot shows a software interface for generating quotes. The interface is divided into several panes. On the left, there is a tree view of 'Quote Packages' with a red box around the 'Generate Quote' icon and a red circle with the number '10'. Below this, a 'Quote Packages Sent' section is highlighted with a red box and a red circle with the number '11'. On the right, there is a 'Proposal Pages' section with a list of items and checkboxes, and a 'Custom Options' section with a list of items and checkboxes. A red circle with the number '9' is placed over the 'Generate Quote' button at the bottom right of the interface.





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