

STARTING A NEW ESTIMATE

1. Go to **Estimate** Drop Down Menu, select **New**
2. Either choose a **current customer from the list below** (if customer exists skip to step 5), or add a **new customer** (click the **New** button on the right).
3. Make sure that you are inputting the **Billing/Mailing Address (not the job address)** in the **CUSTOMER** info page.
4. Then click **Save** and **Close**. This will take you to a new **ESTIMATE** screen
5. Start by typing the **JOB ADDRESS** (building to be insulated) Make sure to include all relevant info (e.g.: **subdivision, lot number, city and state**).
6. Select the **Estimator** name from the drop-down list. Change the **Gross Margin %** and **Source** if applicable. Check **Blueprint** and indicate blueprint revision **Date** if applicable.
7. Now begin creating the **Estimate specs**. Starting at the top, work your way down using your field take-off sheet. Check product specifications and input information in the **QTY** column that corresponds with your needed material.
8. After the Estimate info has been input and **Double Checked**, click **Save**. Print by clicking the **Printer Icon** in the **Estimate Toolbar**. To create a Quote, click the **“Q” icon** in the **Estimate Toolbar**. If you have modified an existing Estimate and want the Quote to reflect the changes, click on **Create**, then **Yes** to overwrite. You can edit the Quote document in the tab pages. To print, first click **Save**, then **Preview**. If correct, click the **Printer Icon** in the **Print Preview Toolbar**
9. The Estimate stage is now complete until the job is awarded. Click **Close**.

CREATING THE WORK ORDER

10. Once Job is awarded, click on **Estimate-> Open**, and then search for the proper Estimate for the job. **Double click on the Estimate** to open.
11. Using the **Estimate Toolbar**, click on the **“WO”** button to create a new **Work Order**. This will take you to a new screen. **Make sure this is only done when the job has been awarded.**
12. **Check** the Product specs on the **Detail** tab. If correct, click on **Save**, then proceed to the **Matl Req** tab.
13. At **Matl Req**, Start by labeling the job **Phase** in the “Description” window.. Use wording like “batt”, “attic”, or spell out the phase number. **Do not input a number!** Then click the single or double right arrow (depending on phase) to transfer material from **Work Order Products** to the **Material Requisition** side. Select any materials that will not be used in the phase and return to the left side by clicking the left arrows.
14. Click the **Dispatch** tab. Click on the proper **Material Requisition (Phase)** to dispatch, then click the **“Dispatch A Requisition”** button. This will take you to a print preview screen. Click on the **Printer Icon** in the **Print Preview Toolbar**.
15. The **Material Requisition** and **Installer Dispatch** sheet are given to the installers prior to the job (phase), and then collected on completion to input **Job Activity** information.

This is as far as you can go before the installation of this PHASE is complete.

JOB ACTIVITY AND INVOICING

16. Once the **Material Requisition** and **Installer Dispatch** are turned in, Click on **Work Order->Open**, search for the proper job and **double click** to open.
17. Click the **Job Activity** tab and **select the proper phase** in the drop down menu that currently says "FULL JOB". Then click the "**Enter Activity**" Button to the left to bring you to a screen where you can input material and labor for this phase.
18. Begin with the **JOB DATE**. Be sure that it is the proper **date that the phase was completed**. Then hit the **Tab** key to begin in the **JOB ACTIVITY** fields. Input the bag quantity of material used in each line. Once complete click **Save**.
19. Click the **ADD LABOR** button to activate the labor section of the screen. Choose an employee with the drop down menu. Set a **PAY METHOD** for each employee: if HOURLY input a number in the **RATE** column, if SYSTEM (sq ft) pay, leave the RATE blank. **Always input the time spent on the job in the HOURS column. FLAT SUM and QTY RATE** are rarely used. When using **SYSTEM** pay you **must** input a percentage up to a combined total of 100% in the **SPLIT** column for each employee. When complete, click **Save**, then **Close**.
20. Next, create an **Invoice**. To complete this you must click on the **Invoice** tab.
21. The **Invoice** screen is very similar to the **Matl Req** screen. Start by labeling the invoice by **Phase**. Then Click on the **single or double right arrows** to move the product from the **Work Order Products** list to the **Invoice** list. Remember to move all products not yet installed back to the left (**Work Order Products**) column. Then Click on the **INVOICE** button. This will take you to a new screen.
22. In the INVOICE MAINTENANCE screen click after "**Materials and Labor per Estimate**" and add the **phase** info ("Materials and Labor Per Estimate, phase one" or "Walls".) Add-ons or credits can also be typed into the lines below. When complete, click on the **SAVE** button in the upper right. Then click the **Printer Icon** in the **Toolbar** to see a **Print Preview** screen. Click on the **Printer Icon** in the **Print Preview Toolbar** to print the **INVOICE**. Now this **phase** is complete.
23. To start a new **phase**, click **WORK ORDER -> OPEN**. Choose the correct Job and **double click** to open.
24. Repeat Steps **13** thru **22** on this sheet, using a different **phase number**.
25. Once all of the **phases** are complete, Click on the "**Wo Closed**" box next to the **INSERT ITEM** button on the WORK ORDER screen. Then, click on **SAVE**.
26. To reprint the Work Order with actual costing, click the **Printer Icon** on the **Work Order Toolbar**. This will take you to PRINT PREVIEW screen. Click the **Printer Icon** on the **Print Preview Toolbar**.
27. To report on material and labor activity, click on the Job Activity tab. Make sure that "FULL JOB" is in the drop down menu. Click the **View Activity** button, then the **Printer Icon** at the top left of the screen.

Now the job is 100% complete.