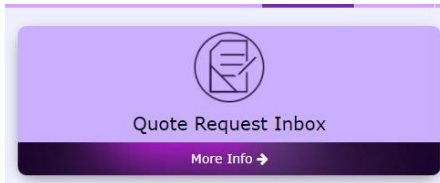
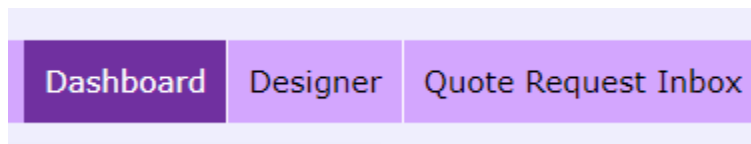


How to Complete an Estimate:

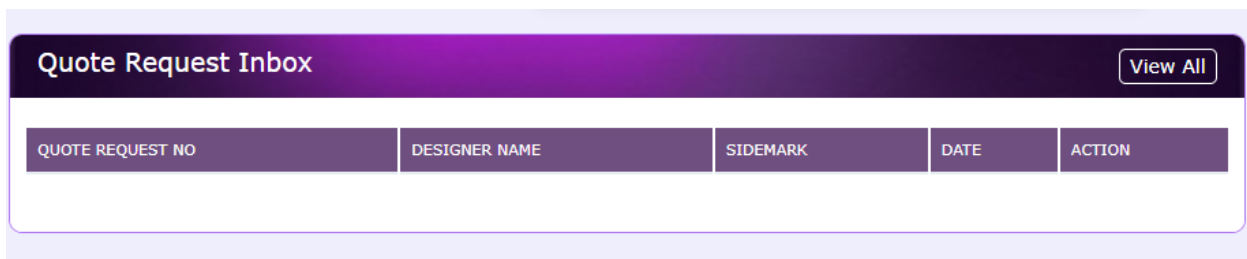
1. You have 3 ways to get to your quote requests:
 - a. The top left box on your Dashboard, click on More Info.



- b. Click on the Quote Request Inbox Tab on the top menu.






- c. Go to the Quote Request Inbox and select View All.



2. You will see a list of Pending Quotes and their status. If you have not quoted it yet it will say “Not Quoted”. If it has been quoted it will say “Quoted” and if it has been ordered it will say “Ordered”. If there are new quote requests the status will say “Not Quoted” and there will be a \$0.00 total to the right.
3. Select the eye icon to view only, select the arrow to estimate it.
4. When you click on the arrow the quote request will open.
5. Along the top you will see the “contents” of the quote request:



6. The arrow under the treatment description indicates the form that is currently open. Once you fill in that form you can move to the next form.
7. On the right of the form is the designer supplied treatment details. You cannot edit this part of the form except to add picture of fabric or treatments the designer did not include. If you do add pictures to this side, remember to save and continue this first, before you fill in the estimate side. This will become the work order so it’s important to have pictures included.
8. The Left side of the form is where you fill in the charges and yardages.

9. Additional Description at the top is where you would insert your code for the treatment type. It will not be visible to the designer on their side. i.e., LPP for Lined pinch pleat or whatever code you use.
10. The unit is where you put in the pricing units. i.e., # of widths, feet, or sq. ft. or per each.
11. The second cell is the \$ amount you charge per unit.
12. The third cell is automatically calculated for you.
13. If you need to add other charges, select the  another charge such as banding, headrails, nail heads, etc. You can also add a description of the additional charge. You can add up to 3 additional charges.
14. Fill in the yardage for lining and the charge for lining if you supply lining. If the treatment is not lined, you can leave it blank.
15. All the charges will be added together into the Grand Total cell.
16. Additional note is for you to be able to include extra information, questions or concerns.
17. Under Fabric Details there will be a list of all fabrics included in the designer quote request.
18. Under each fabric name you will fill in yardage and cut information.
19. Once you've filled in all the information you can click save and continue. If there are multiple forms this allow you to select next and move to the next form.
20. When you have completed all the forms select "Send Estimate" on the top right-hand side of the page. If you want to go back and review the data you've entered select previous and you can move back and forth between forms.
21. If your designer chooses to revise the form, you will receive a new Quote Request with the extension .1 after the quote number. That means this is the first revision. They can continue to revise the form as many times as needed. The extension will change with every revision
22. When you receive a revised quote request you will have a Red Back arrow to the right of that form.  Clicking on that will allow you to look at all previous version of that estimate. You can open any version on another screen and look at the old and new version at the same time.
23. On a revision you will also be able to tell which form has been revised (it will be in a different color than the unrevised forms) if there are multiple forms. The data in the unrevised forms remains intact and you only need to revise the estimate on the one form.
24. You can archive an estimate once you know it has been lost by clicking on the zipper file  icon.