

## Office Estimates Redesign

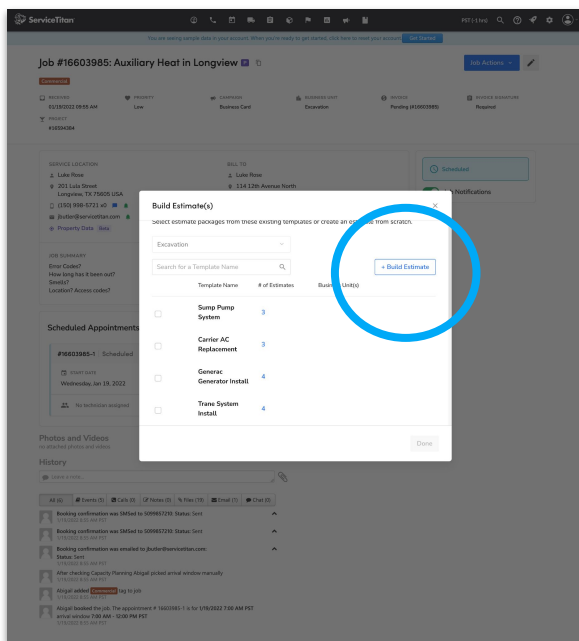
*Get Estimates out the door faster*

We know inefficient workflows can slow down the way you work, so we've redesigned the way you build and manage estimates in the office so you can quickly get estimates out the door and improve your profits on every job. The Office Estimates redesign is automatically enabled for you with ST-59. There are no new permissions and no loss to the existing functionality. For a list of notable changes, click [here](#).

### WHAT'S NEW

- ★ Inline editing of Items
- ★ Drag and Drop Items
- ★ Create Item Groups
- ★ Real-time display of Gross Margins
- ★ Improved User Interface (UI)

You'll build an estimate from the office just like you do today. You'll input the same general estimate details as before, only now we've categorized the fields into sections displaying the Customer & Location details along with the Name and Summary right at the top.





## Estimate Items

You can add Tasks, Equipment, and Materials to your estimate like before, but now you can add items in one click. For example, when you click **Equipment**, type the name of the Equipment to add, and when you select the Equipment, all of the information will populate for you automatically. Previously, you would have to choose the item type, select the item you wanted, then click to add it to the estimate.

Select item type

Enter item name

Item is added

Name & Code	Description	Add On	Task	QTY	Unit Cost	Unit Price	Total Price
Generic Equipment Generic Equipment	Generic Equipment	<input type="checkbox"/>	<input type="checkbox"/>	1.00	1000.00	0.00	\$0.00
				TOTAL COST \$1,000.00		TOTAL PRICE \$0.00	

## Inline Editing and Drag & Drop

Once you start adding your items, you can easily edit items inline by clicking into the text field. You can also easily reorder the items using drag and drop functionality by clicking on the two dots and dragging them where you want. Previously, you would have to click the pencil icon to make any edits and use the up and down arrows to adjust the order of the items.

Inline Editing

Name & Code	Description	Add On	Requisition St...	Task	QTY	Unit Cost
Generic Equipment Generic Equipment	Equipment 1	<input type="checkbox"/>	Completed	<input type="checkbox"/>	1.00	1500.00

Drag & Drop

Name & Code	Description	Add On	Requisition St...	Task	QTY	Unit Cost	Unit Price	Total Price	Project Labels
Generic Equipment Generic Equipment	Equipment 1	<input type="checkbox"/>	Completed	<input type="checkbox"/>	1.00	1000.00	0.00	\$0.00	drag up
Generic Equipment Generic Equipment	Equipment 2	<input type="checkbox"/>	In Progress	<input type="checkbox"/>	2.00	1000.00	0.00	\$0.00	drag down
Generic Equipment Generic Equipment	Equipment 3	<input type="checkbox"/>	In Progress	<input type="checkbox"/>	3.00	1000.00	0.00	\$0.00	drag up
				TOTAL COST \$4,000.00		TOTAL PRICE \$0.00			

## Hiding, Editing, Deleting

When you hover an item, you'll see three icons appear:

- Eye Icon: Lets you hide items from the estimate. This is helpful if the customer doesn't have to see it.
- Edit Icon: A flyout opens for you to make all edits to an item.
- Trash Icon: To completely delete the item from the list.

Name & Code	Description	Add On	Requisition St...	Task	QTY	Unit Cost	Unit Price	Total Price	Project Labels
Generic Equipment Generic Equipment	Equipment 1	<input type="checkbox"/>	Completed	<input type="checkbox"/>	1.00	1000.00	0.00	\$0.00	drag up



View/Edit Equipment Details

General

Name

Generic Equipment

Code

Generic Equipment

Description

Equipment 1

Equipment Details

Manufacturer

Model

Serial Number

Installed On

☐

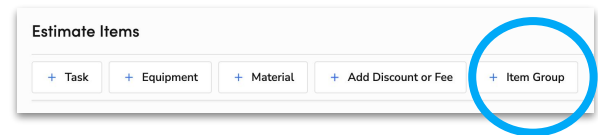
Cancel

Save

Back to Top

## Item Groups NEW!

Item Groups are new to Office Estimates and help bundle Tasks and Equipment items into groups. For example, if you have multiple tasks in one estimate and want to group the various equipment items into each task, you can create an item group. Item Groups must be enabled in your account for use.



**Create Item Group**

Parent Item Type: **Task** | **Equipment**

Select Parent Item: **GFR-120: Replace Gas Valve - Universal**

Name (optional):

Description: **Replace gas valve task and equipment items.**

Project Labels: **Select Project Label**

Cancel Save



**Estimate Items**

+ Task | + Equipment | + Material | + Add Discount or Fee | + Item Group

Expand Descriptions

**Item Group**

**Replace Gas Valve - Universal** TOTAL \$250.00

Name & Code	Description	Add On	Tax	QTY	Unit Price	Total Price	Estimated
Replace Gas Valve - Universal	Replace gas valve task and	<input type="checkbox"/>	<input type="checkbox"/>	1.00	0.00	\$0.00	\$0.00
Labor	Labor	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1.00	250.00	\$250.00	\$60.00

+ Add Task

Name & Code	Description	Add On	Tax	QTY	Unit Cost	Unit Price	Total Price
Rheem/RAWL (10 - 20 Ton)	Galvanized steel with a	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1.00	180.00	0.00	\$0.00

+ Add Equipment Keyboard Shortcuts

Gross Margin: **95.43%**  
\$5,030.00

## Margin Calculator NEW!

One of the most exciting changes on this page is the Margin Calculator. As you start adding Tasks, Equipment, and Materials, this automatically updates to show you the cost totals and gross margin. This helps you know upfront how profitable a job will be. Additionally, when you click **Payments**, you'll see any Collected, Applied, and Unapplied payments.

**Costing** | Payments

**Price Details**

SUB-TOTAL **\$119,200.00**

TAXES ▲

Tax **\$0.00**  
0%

TOTAL TAXES **\$0.00**

TOTAL **\$119,200.00**

**Cost Details**

Labor **\$62,100.00**

Material **\$23,660.00**

Equipment **\$3,000.00**

TOTAL **\$88,760.00**

Gross Margin **25.54%**  
**\$30,440.00**

**Costing** | **Payments**

Collected **\$2,600.41**

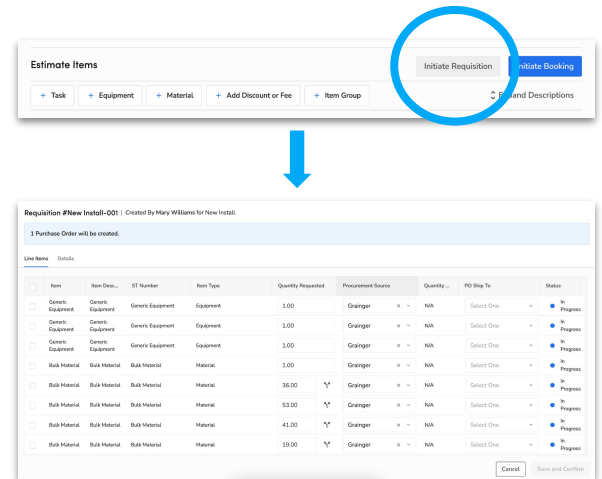
Applied **\$2,600.41**

Unapplied **\$0.00**

Back to Top

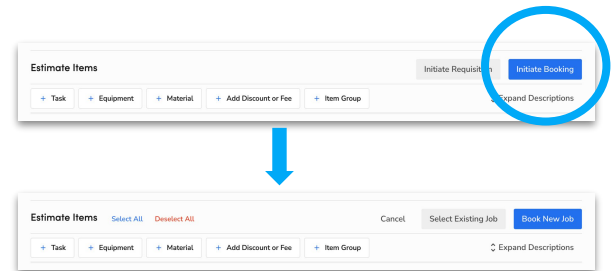
## Initiate Requisition

After an estimate gets sold and when Requisitions are enabled in your account, you'll see the **Initiate Requisition** button appear. This lets you get the procurement process started right from here. Once clicked, you're brought to the Requisition page and can complete the Purchase Order as you normally would.



## Initiate Booking

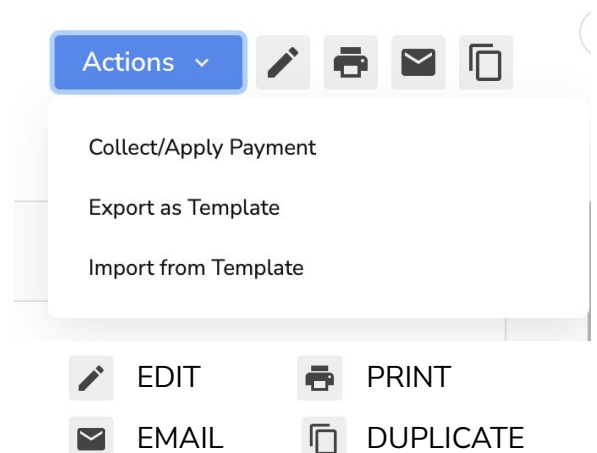
After an estimate gets sold, you'll see the **Initiate Booking** button. This lets you book a job to start performing the work. When **Initiate Booking** is clicked, you can select your estimate items and then **Book New Job**. If you've previously booked a job for this estimate, you'll see the **Select Existing Job** button. After **Book New Job** is clicked, you'll follow the existing workflow to book a job.



## Actions

We've consolidated all actions at the top of the page. First, the **Actions** dropdown will let you **Collect/Apply Payment** and **Export/Import** estimate templates. Additionally, you'll see icons to **Edit**, **Print**, **Email**, and **Duplicate** the estimate next to the dropdown.

*Collect/Apply Payment is only available to customers with Payment Collections enabled. Export/Import is only available for customers with Opportunities on Projects enabled. If you don't have either of these enabled in your account, you will not see the Actions dropdown.*



## Notable Changes

Action	Before	After
<b>Sort Items</b>	Click Up/Down arrows one row at a time.	Drag and Drop items wherever you want.
<b>View Opportunity</b>	Scroll down the page and click the <b>View Opportunity</b> button.	Clickable <b>Opportunity Number</b> that is always visible at the top of the page.
<b>Initiate Requisition</b> (must have Requisitions enabled)	Select checkboxes for the items you want and then click <b>Initiate Requisition</b> .	Click the <b>Initiate Requisition</b> button and then select all or specific items.
<b>Markup Items</b> (must have Time and Materials enabled)	Select time and material parent item, and then the materials with markup would show up in a separate table from other materials.	When you add a material in a new row, a flyout appears to select a time and material parent task. The material is now displayed in the material table with all of the materials and has an icon indicating it has markup.
<b>Editing Labor Cost</b> (must have Budget vs Actuals enabled)	Could only edit estimate labor cost within the task edit page.	Edit estimated labor cost inline as well as the edit task flyout. The labor cost total is displayed in the Margin Calculator on the right.
<b>Calculate Rate Sheet</b> (must have Pricing Engine enabled)	Button at the top of the page to apply the rate sheet.	The button is now located next to the rate sheet name.
<b>Import/Export Templates</b> (must have Opportunities on Projects enabled)	There was an Import and Export button on the left-hand side navigation.	Import and Export options are consolidated under the Actions dropdown.
<b>Collect/Apply Payments</b> (must have Payment Collections enabled)	Collect and Apply Payments using a button on the left-hand side navigation.	Collect and Apply Payment options are consolidated in the <b>Actions</b> dropdown and the amount collected will be displayed in the Margin Calculator panel when <b>Payments</b> is clicked.

[Back to Top](#)