Service Autopilot™

ESTIMATES

USER GUIDE

V3.1

Contents

Estimates: The Big Idea

Estimates are an important part of marketing your business, and the presentation is key to winning.

Service Autopilot offers the tools for you to build an estimate, send it to clients and leads, receive notifications about its status, and schedule jobs.

The initial setup requires an investment of time, but you'll gain efficiencies when you create estimates in the future.

How It Works

You can build specific documents, emails, and pricing grids to meet the needs of your different clients and marketing scenarios. You might create different sales campaigns for leads, existing clients, or upsells for services you offer. Using different document templates and emails lets you gear your presentation to various services and recipients.

Example

For example, you might offer silver, gold, and platinum bundles, so you would build grids specific to each bundle. Next, you would add appropriate bundles to the estimate. Or you might list multiple services in the estimate for the client to select. You might even want to use different language to address a commercial client versus a residential client.

By investing time up front in setting up documents and pricing, you'll streamline the process for your future estimates.

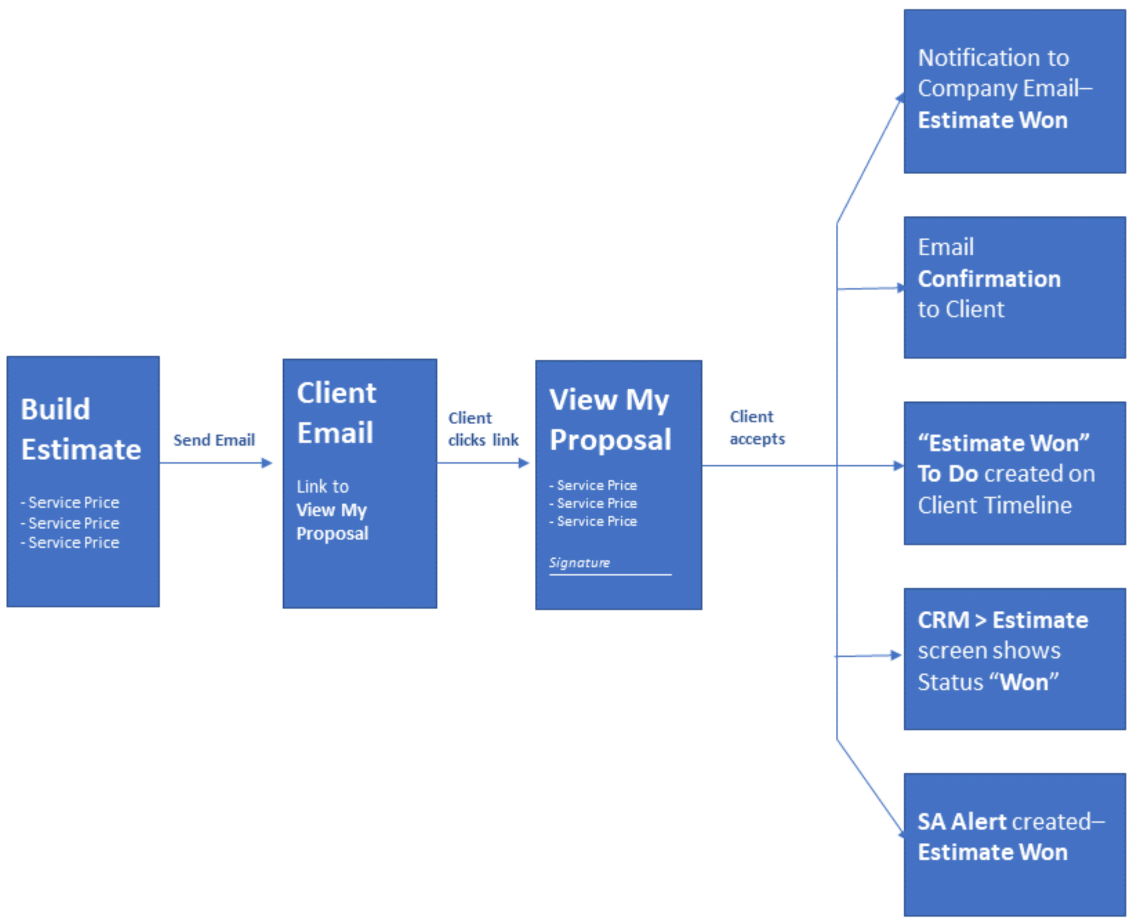
"It's all about the setup."

--Scott Howard

Estimates Overview

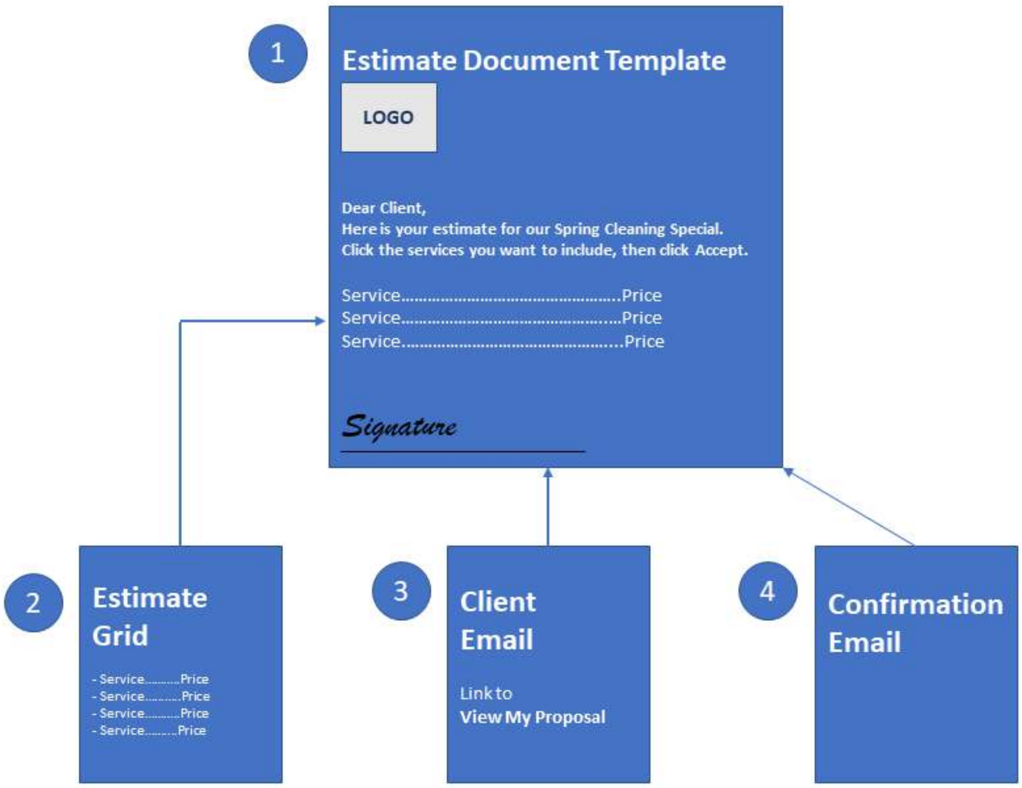
This guide is divided into two sections. The first topics walk you through the essential steps to get started with estimates. Later, we cover some advanced concepts, as well as setup options.

The graphic shows a high-level overview of the estimate workflow from building the estimate to winning it.



Build an Estimate Document

The Estimate Document has up to four parts:



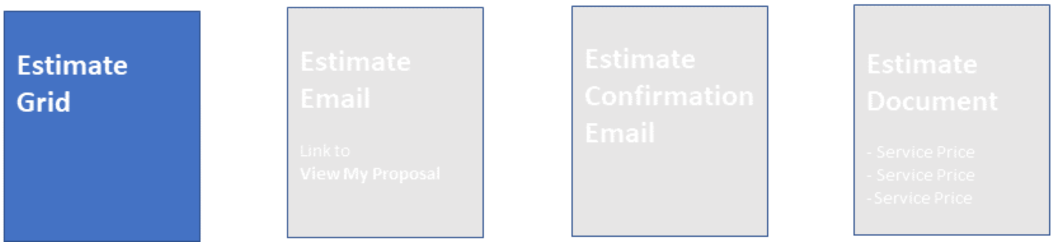
1. **Estimate Document** – This will become the actual estimate that your client will see, either as a printed document or PDF. It contains the estimate grid, client email, and confirmation email.

2. **Estimate Grid** – This is the part of the estimate template that contains the estimate line items--your quoted services, products, rates, and totals.

3. **Client Email** – This email goes to the client or lead, and can contain the estimate document in PDF form, and a link to the **View My Proposal** webpage. You can set it up so that the client can sign with a finger or mouse, then click the **Accept** button. Sending a Client Email is not required; you can simply print your estimate.

4. **Confirmation Email** – This is the email the client or lead automatically receives after they accept the estimate on the **View My Proposal** webpage. The Confirmation Email is optional; you can send an estimate without it.

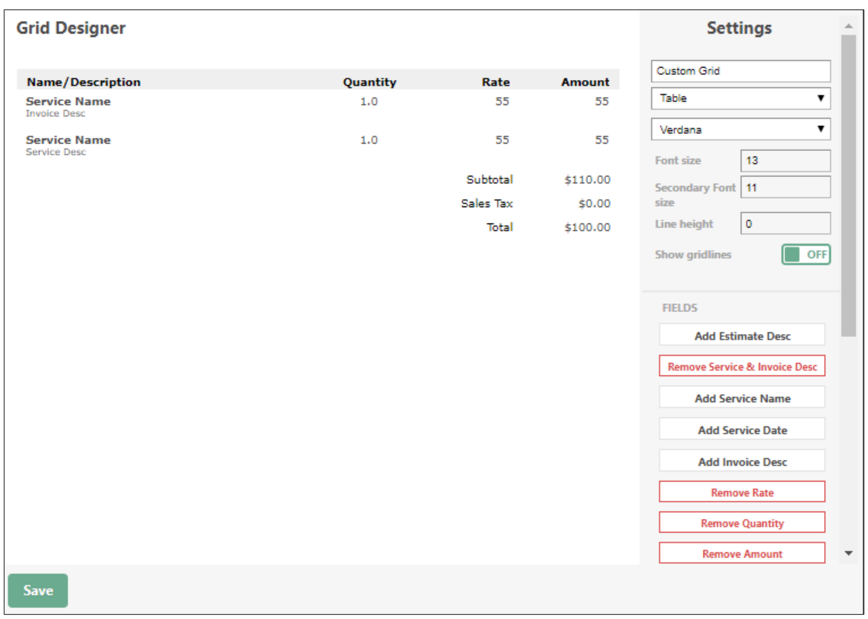
Create an Estimate Grid



The first step in creating an Estimate Document is to prepare an Estimate Grid. The Estimate Grid is a structure that defines how your line items look on the estimate. It can include your quoted services, products, rates, and totals. The Estimate Grid will appear in the finished Estimate Document.

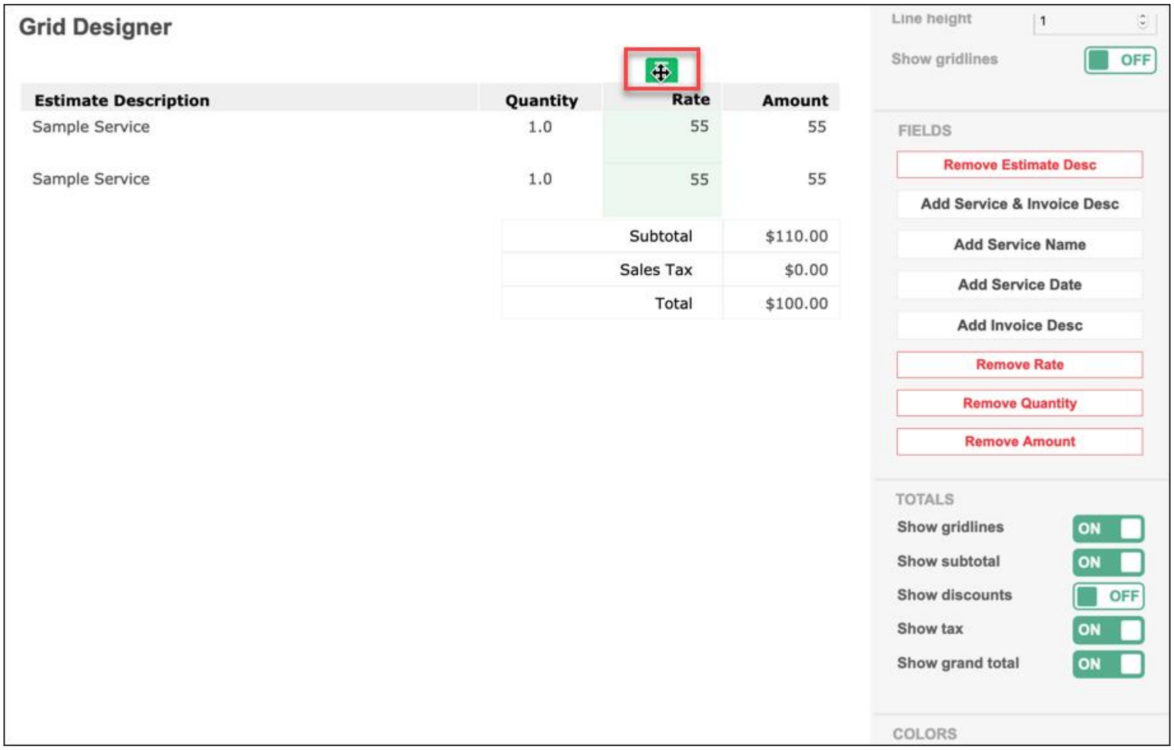
You can include as much detailed information as you want your client to see.

1. Go to **Settings > CRM > Estimate Grids**.
2. Click **Add Grid** to see the **Grid Designer** overlay.



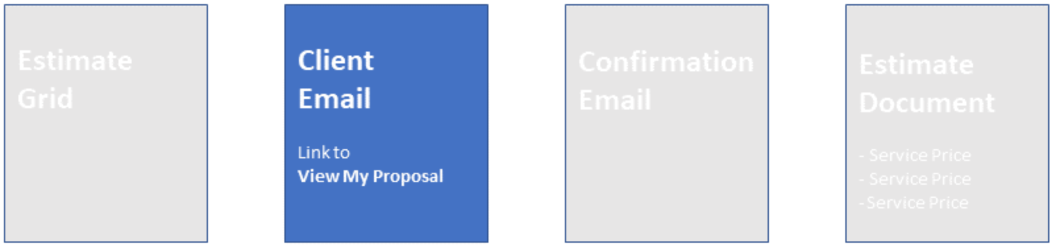
3. Under **Settings**, rename the grid.
4. Choose to make the grid either a Table or Paragraph.
5. You can change the font, font size, and line height, and turn off gridlines. A good rule of thumb is to make the "Line Height" at least 1 for readability.
6. In the **FIELDS** section, click to select any columns you want to include in your grid. At a minimum, include the "Estimate Description" and "Amount."

7. Click and drag any columns to reposition them by hovering over the column, then dragging the green tab that appears at the top of each column.



8. In the **TOTALS** section, click to turn off any items you don't need. None are required.
9. In the **COLORS** section, choose any colors you want for the different sections of the grid.
10. Click **Save**.

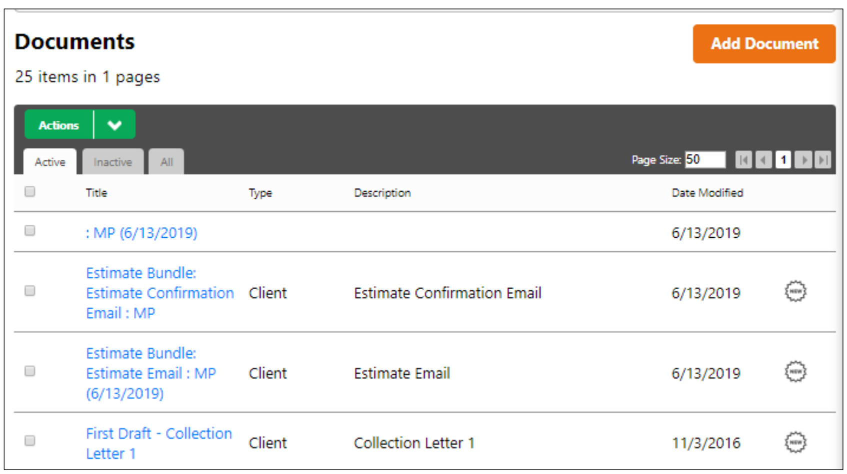
Create a Client Email



The Estimate emails are both optional, but recommended. Preparing these pieces in advance enables you to create estimates faster.

You can create an email from scratch, or download a template from the Marketplace. Follow these steps to create a new Client Email or Confirmation Email.

1. Go to **Settings > CRM > Documents**.



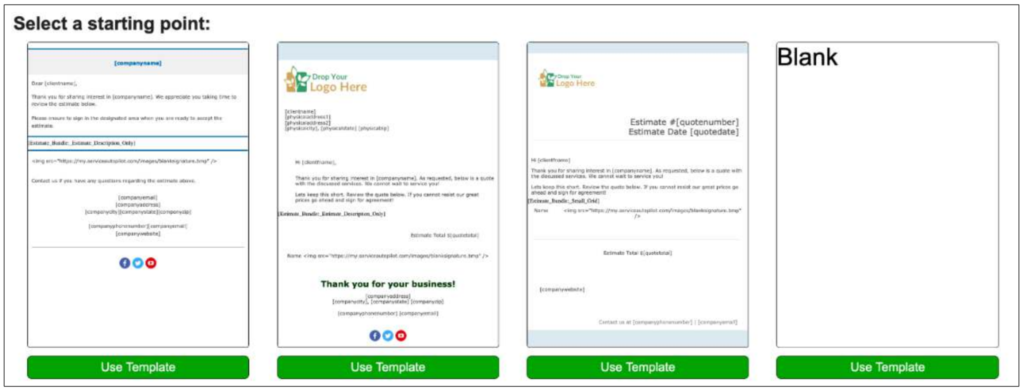
2. Click **Add Document** on the top right corner of the Documents list.

3. For **Document Type**, select **Client Email**.

4. Enter the document name and description (for your reference only; these are not seen by the Client).

5. Enter an email subject that will appear on the subject line of the client's email.

6. Click **Save**. You are then redirected to the Document Editor.

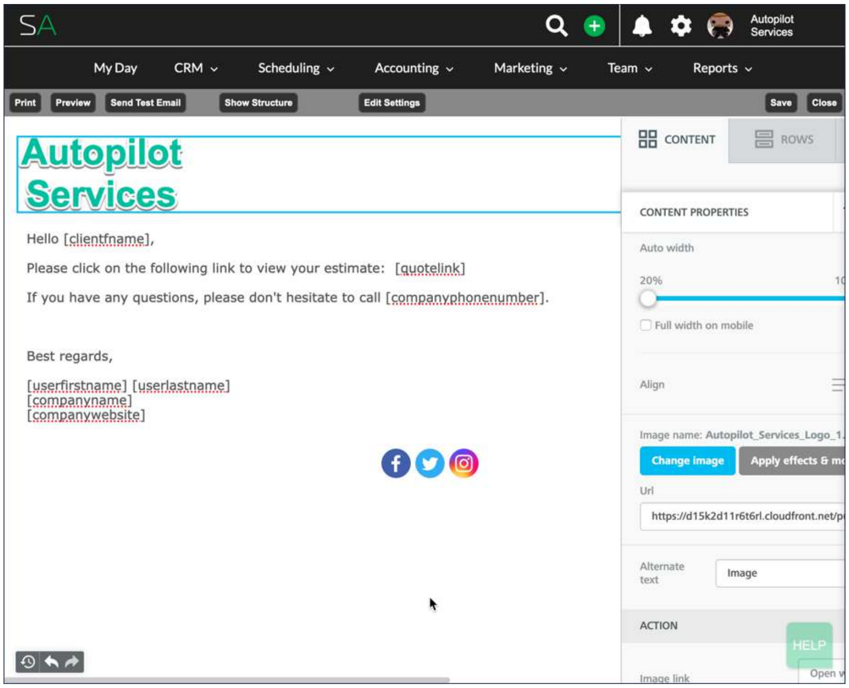


7. Click the green **Use Template** button to select a customizable document template, or choose the blank one to build your own Client Email.

8. Create your email, and insert text, images, and merge tags as needed.

9. Include the Estimate Link Merge Tag [quotelink], which will take the client to the **View My Proposal** website. There, the client will be able to see the full estimate, select specific services, and approve it. If you've added a signature line, they can sign it with their mouse or finger.

   The client email will look something like this.



For more information on using the Document Editor, go to:
HELP > User Guide > Document Editor or **HELP > How-To Videos > Document Editor**

Create a Confirmation Email

After a client accepts your estimate online, they can receive an automatic confirmation email from you. This would say something simple, such as: “Thank you for accepting our estimate. We’ll be in touch soon to schedule your services.”

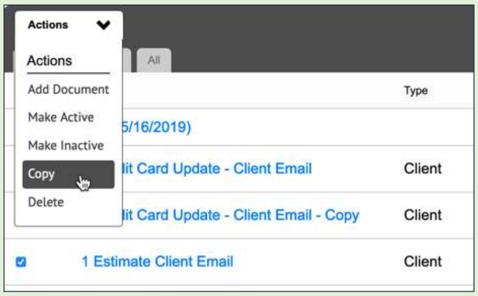
You can create the confirmation email from a copy or from scratch, or by downloading a new template from the Marketplace.

The steps are the same as creating a Client Email as shown on page 6, except that you don’t need to include the “Estimate Link” merge tag.

Create an Estimate or Confirmation Email from a Copy

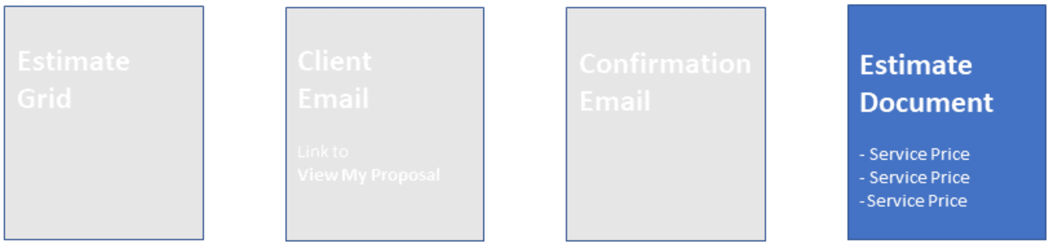
You can save time by starting from a copy of an Estimate Email you already created.

1. Select the email in the **Documents** list, hover over **Actions**, then select **Copy**.



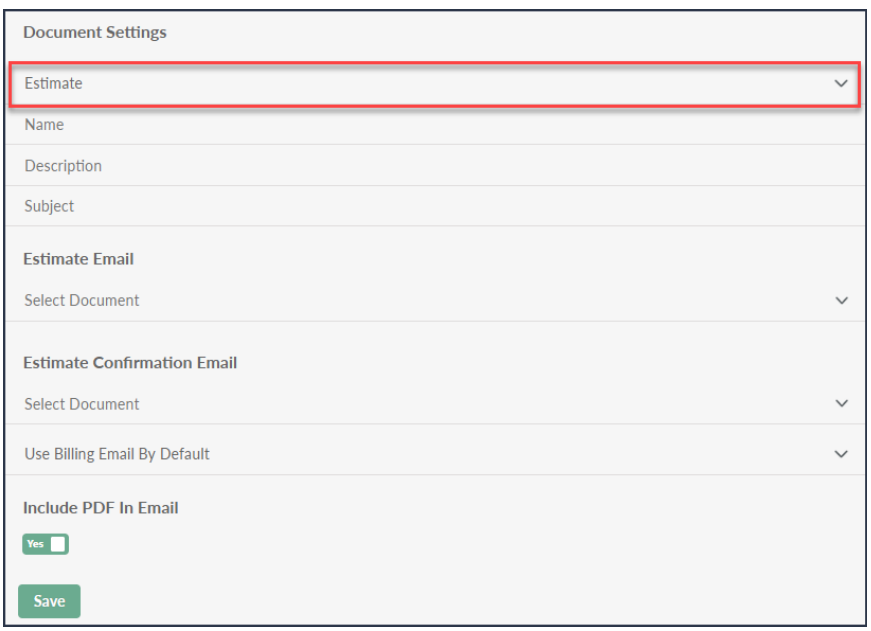
2. The copy of the email appears in the Documents list, with "Copy" on the end of the name.
3. Rename the document, change the Subject line, and click the **Edit** button.
4. In the Document Editor, edit the text.
5. Click **Save**.

Create an Estimate Document



After setting up your Estimate Grid and optional Client Email and Confirmation Email, you're ready to put these into an Estimate Document. You can create the Estimate Document from scratch, or download a template from the Marketplace. These steps show how to create a new Estimate Document.

1. Go to **Settings > Documents**.
2. Click **Add Document** on the top right corner of the Documents list.
3. For **Document Type**, select **Estimate**.



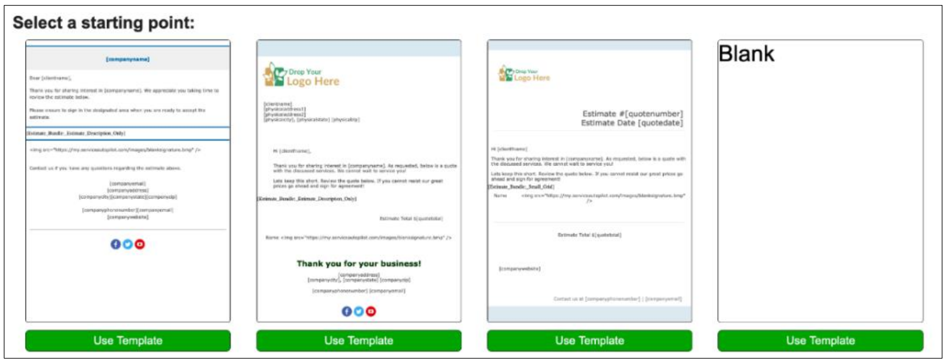
4. Enter the document name and description (for your reference only; these are not seen by the Client).
5. Enter an email subject that will appear on the Client's email. (This will be overwritten if you select an Estimate Email Document in the next step.)
6. For "Estimate Email," select the Client Email Document that you prepared.

7. For “Estimate Confirmation Email,” select the Confirmation Email Document you prepared.

8. For “Use Billing Email By Default,” choose to send this estimate document either to the client’s Billing Email or Contact Email. (In most cases, use “Contact Email.”)

9. For “Include PDF in Email, select “Yes” to include a PDF copy of the estimate as an attachment. This is not needed if your estimate will be viewed and accepted online.

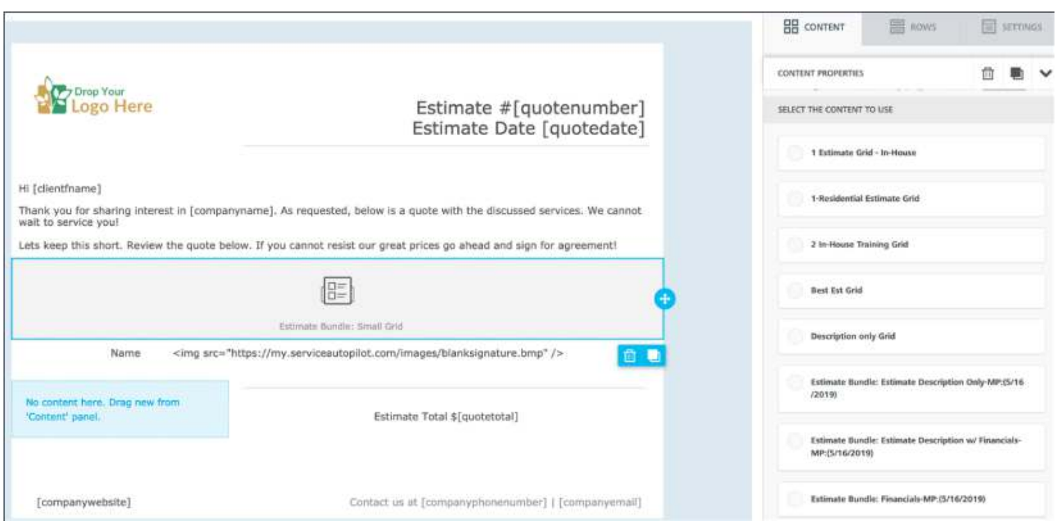
10. Click **Save**. The Document Editor appears.



11. Choose a template, or choose the blank document and build it from scratch. In this example, we chose the third option.

12. Modify any fields as needed.

13. Click the Estimate Grid placeholder to select it. The Estimate Grids you’ve already built appear on the right side of the screen. For instructions on building a grid, see page 4.



14. If you’re building an Estimate Document from scratch, insert an Estimate Grid into the Estimate Document by doing the following.

    a. On the “Rows” tab, drag in drag in a new row where you want pricing to display.
    b. On the “Content” tab, click Dynamic Content, then drag it to the row you just inserted.

This is where your grid will go.

c. Click the radio button on the right to select a grid.

15. Add social media links, if you wish.

16. Optionally, you can include any text, such as your Terms and Conditions, below the grid, at the bottom of the Estimate Document. This additional information can allow the Estimate Document to serve as a contract agreement.

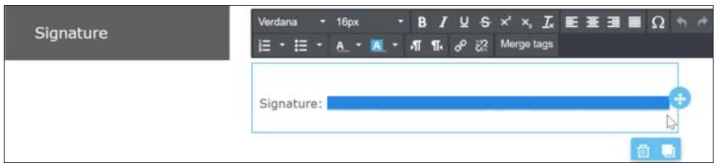
    Tip: To accommodate different types of clients, you might create two or more document templates. To do so, use the Copy feature, edit the wording, and name each accordingly. For example, you might have “Commercial Estimate Document” and “Residential Estimate Document.”

For information on using the Document Editor, go to:
HELP > User Guide > Document Editor or **HELP > How-To Videos > Document Editor**

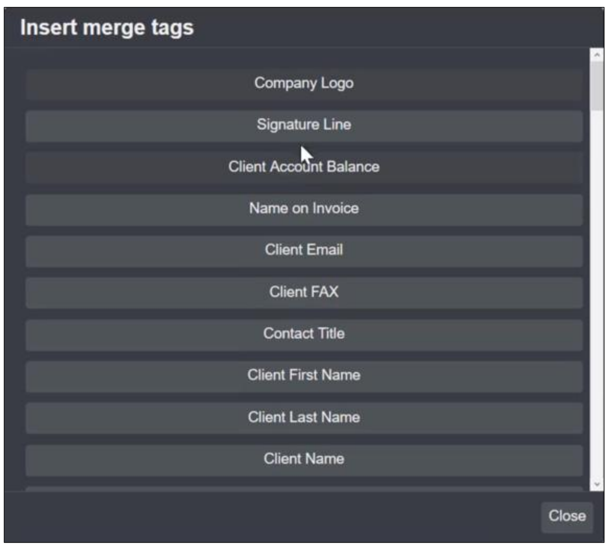
Add a Signature Line to an Estimate Document

Some documents from the Marketplace contain a place for a signature line. To allow the client to sign online, you need to replace this line with a merge tag signature line.

1. Highlight the signature line, then click **Merge tags**.



2. Select "Signature Line."



3. The HTML code is placed in the Signature box.

Note: Electronic signatures require the setting "Allow Signature Capture on View My Proposal." The appendix for Estimate settings starts on page 51.

Quick Tip: Inserting Merge Tags

A shortcut to using merge tags is to type the @ symbol anywhere you want it to go in the body of a document.

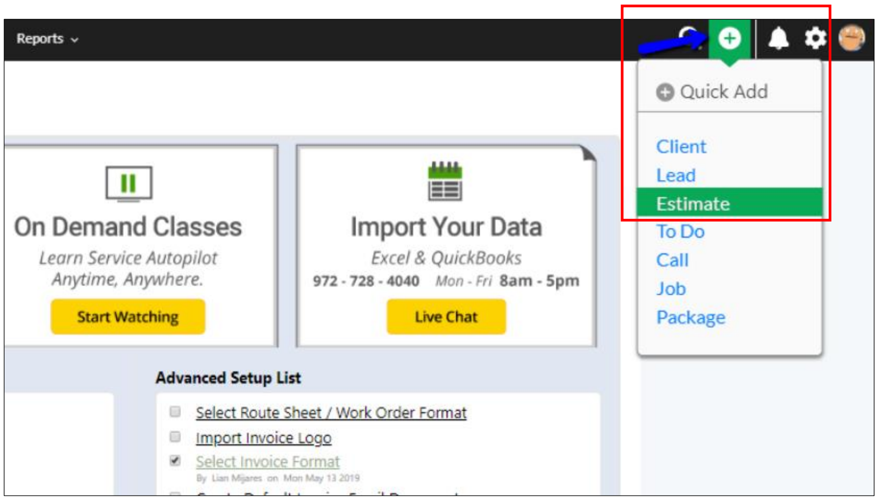
1. For the signature line, you can type "**@sig**" and the system finds the merge tag for Signature Line.
2. Click "Signature Line" and the merge tag is inserted.

Start a New Estimate

Where do you start an Estimate? From any of these places in Service Autopilot:

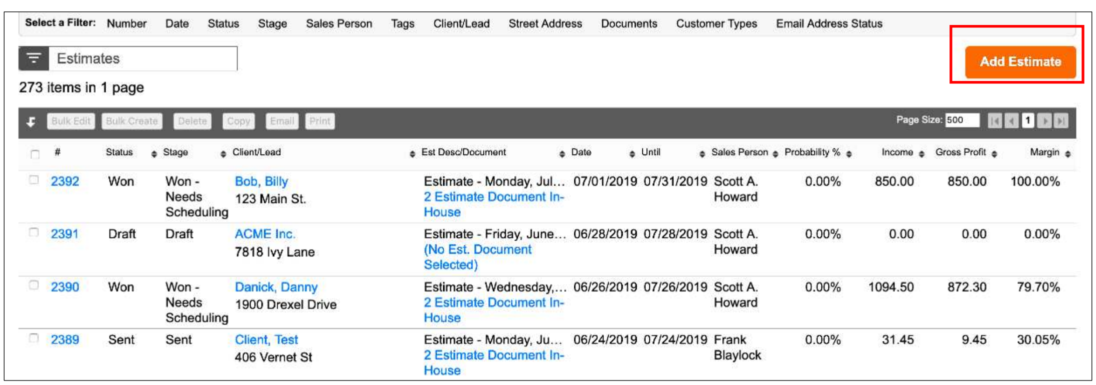
From anywhere in SA

+ (Quick Add) > Estimate



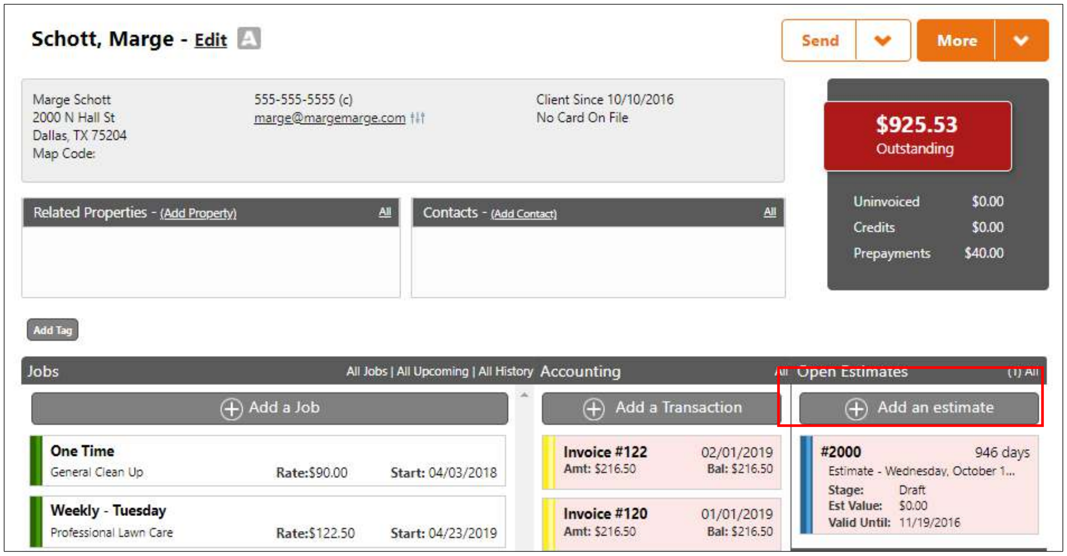
From the Estimate List screen

CRM > Estimates



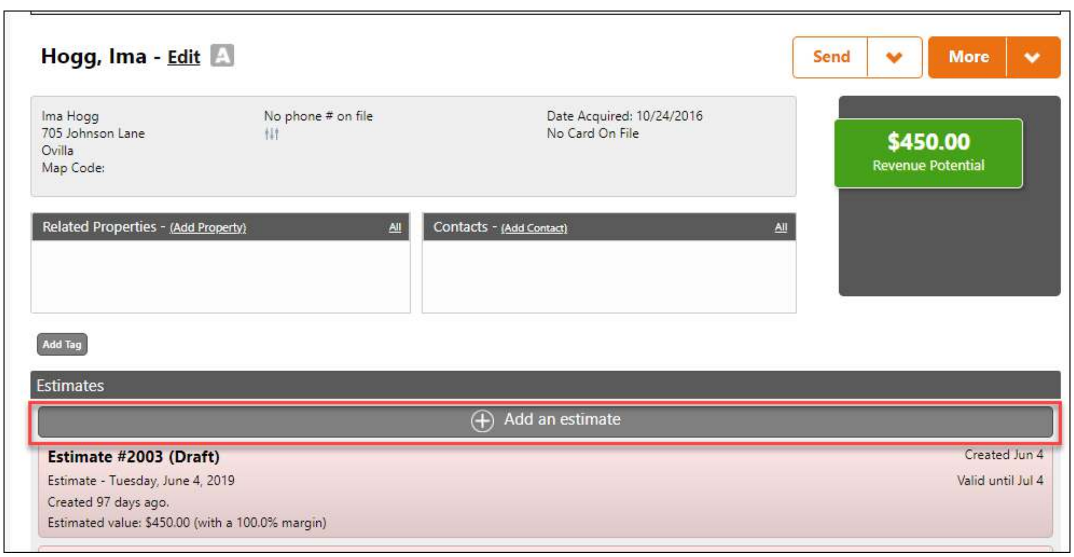
From the Client or Lead Account

CRM > Clients > (Client Name) > + Add an estimate
OR type a client name in the Navigation Bar.



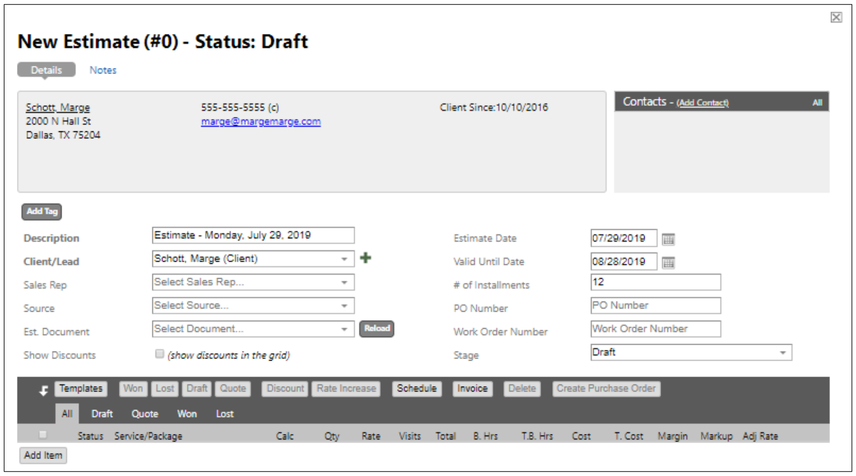
From the Lead Account screen

CRM > Leads > (Lead Name) > + Add an estimate
OR type a lead name in the Navigation Bar.



Fill in the New Estimate Screen

In the **Clients** or **Leads** screen, click **Add an Estimate.** The **New Estimate** screen appears.



In the top half of the screen, fill in information for the estimate. All **bold** fields are required.

Description — Defaults to today's date. Change it if needed.

Client/Lead — Already filled in if the estimate is started from the Client or Lead screen.

Sales Rep — Optionally, select the sales representative from the dropdown list.

Source — Optionally, select the marketing source such as referral or website.

Est. Document — Select an estimate document from the dropdown list. This is the document created earlier in this guide.

Est. Date — Defaults to today's date. Change it if needed.

Valid Until Date — Defaults to 30 days from today. Change it if needed.

# of installments — If you're doing contract billing or need to be paid in installments, enter that number here. It defaults to the number set in the Estimate Settings (and if it's not set, the default is 12). You can use the merge tag within your Estimate Document "Installment Amount" to display the monthly installment price. SA will divide the total amount of the estimate by the number of installments to display the monthly installment amount.

PO Number — Optionally, enter this number.

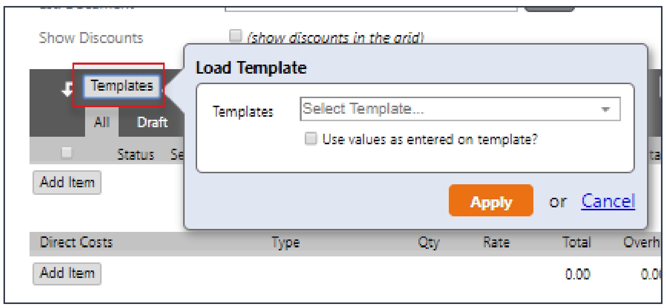
Work Order Number — Optionally, enter this number. If not, a number automatically generates after you save.

Stage Defaults to **Draft**. After you send the estimate, the stage automatically changes to **Sent**. You can customize stages for your needs.

Add a Template

If you have already set up estimate templates, follow these steps on the **New Estimate** screen. See “Estimate Templates“ on page 43 for more information on setting up templates.

1. On the **New Estimate** screen, click the **Templates** button.

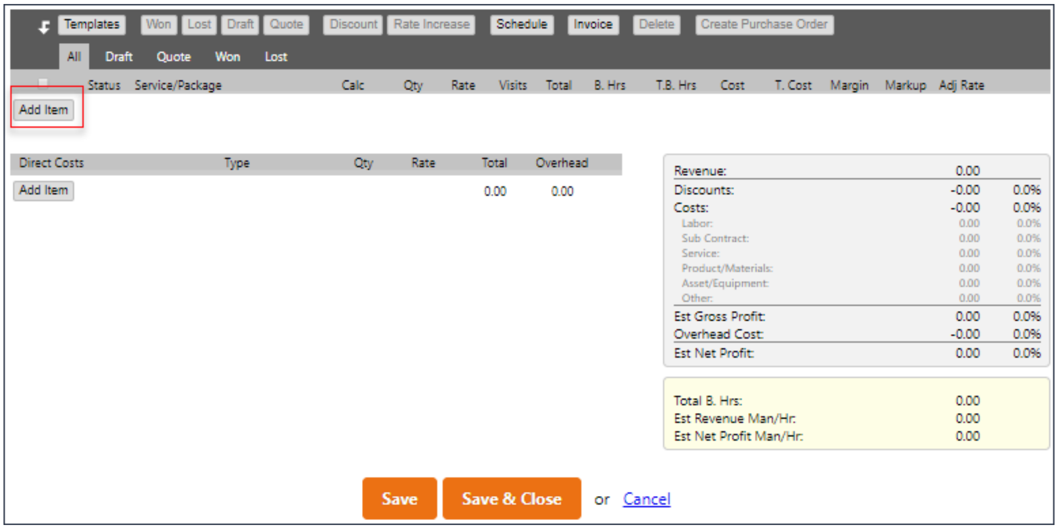


2. In the **Load Template** overlay, select a template from the dropdown list.
3. Optionally, check the “Use values on template” check box. This will fill in all pre-set quantity fields.
4. Click **Apply**.
5. After the template has loaded, fill in or change any information as needed.

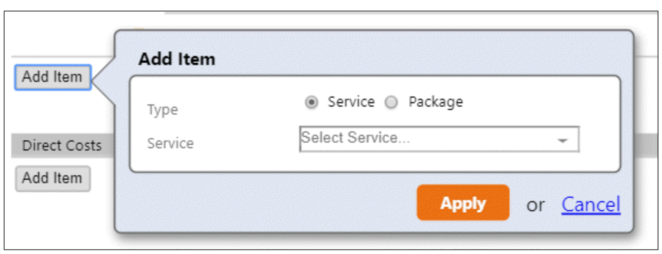
Add Services or Packages to an Estimate

If you've already set up services and master packages, follow these steps on the **New Estimate** screen. See "Create Services for Estimates" on page 36 for instructions on setting up services.

1. Click the **Add Item** button below the list of exis36ting line items, if any.



2. Click the **Service** or **Package** radio button.



3. Select the service or package from the dropdown list, then click **Apply**.

Note: Services and Packages in the dropdown list are set up in **Settings > Scheduling > Services** and **Settings > Scheduling > Master Packages**.

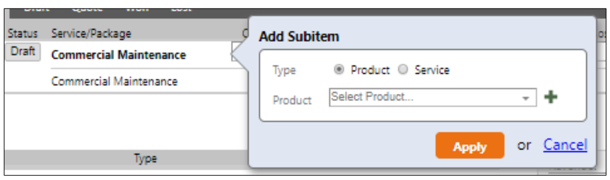
Add Subservices or Products to an Estimate

Optionally, you can add **Subitems** to an estimate on the **New Estimate** screen. This can be a subservice or product.

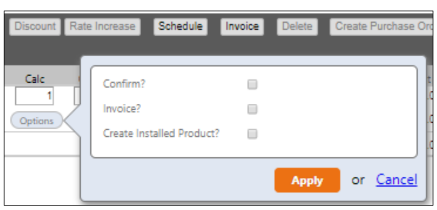
Adding subservices and products can help you calculate your costs more accurately. You can choose whether to have information about products appear on the estimate and/or invoice.

Subservices are used only for budgeting and costing purposes. They never show on an estimate to a client or lead.

1. On the estimate line item, hover over the area to the right of the name, then click the +.
2. In the **Add Subitem** overlay, click the **Product** radio button, then select a product from the dropdown list, then click **Apply**.



3. Add options for a product by clicking the **Options** button.

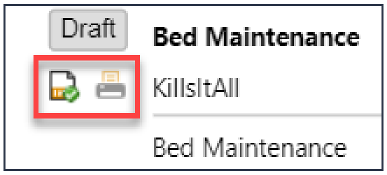


4. On this overlay, you can choose any of these options:

Confirm	Checking this will require you to confirm whether you used the product and to confirm the quantity. Products to confirm will appear in red on the Dispatch Board. Click the barcode icon on the far right to open the job overlay. There, correct the quantity if needed, select the Confirm button, then choose the appropriate option.
Invoice?	Check this if you want this product to appear on the invoice as a separate line item, including a price.
Create Installed Product?	Check this option if you are installing products that have a warranty.

5. Click **Apply**.

6. Specify whether the Client will see the product listed on documents.



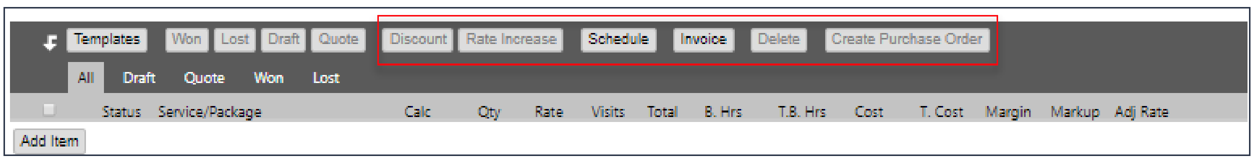
Invoice – Select the invoice icon on the left of the product name for it to appear on the invoice.

Print – Select the printer icon on the left of the product name for it to appear on the estimate.

7. Fill in the quantity and rate, estimated budgeted hours, and the cost for each individual product. The cost and rate defaults to the amount set up at the product level.

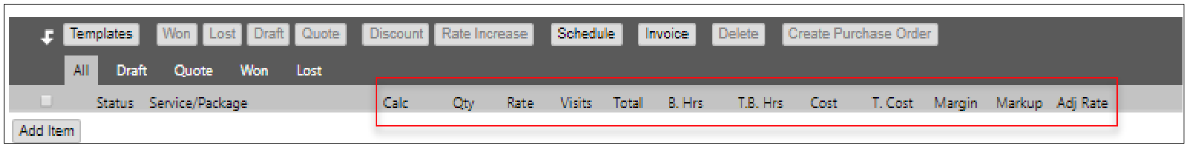
Fill in Estimate Values

The buttons in the middle of the **New Estimate** screen let you do bulk adjustments to the line items you select.



Discount	This button applies a discount to any line items you select.
Rate Increase	Click this button to increase rates for any line items you select on the estimate In the Increase By field, enter a percentage followed by the “%” sign, OR enter a dollar amount. It’s a good practice to use the Notes field to explain why you made the rate increase (this field is for internal use and not seen by clients).
Schedule	If line items have a status of Won, and the Estimate Stage is also Won, click this button to schedule the job.
Invoice	This button creates an invoice for the client for any “Won” items. If you select this option, keep in mind that when you schedule a job from the Estimate, an invoice for that job will be created, even if you created an invoice from the Estimate previously.
Delete	This button deletes the line items you select.
Create Purchase Order	This button creates a Purchase Order for the products and services on the estimate. You can use this to give to a Vendor as a request for materials and/or labor for the job.

In the columns in the middle of the **New Estimates** screen, you can adjust the rates, quantity, and calculation values for each service or product.



Calc This column can be used as a multiplier; it also can be used in a Rate Matrix, if you have one. See page 38 for information on setting up Rate Matrixes.

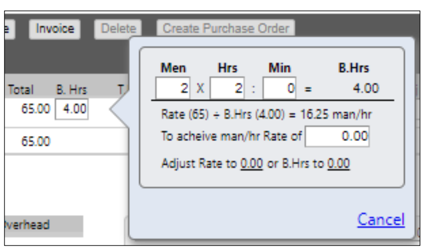
Qty Adjust if needed. This is a multiplier and can be used in a Rate Matrix.

Rate Adjust if needed. This defaults to the rate set at the service level. The rate typically displays to the client with the visit rate or the hourly rate. A Rate Matrix can be used to calculate the rate.

Visits Adjust if needed. For example, you might include the number of visits in the season so you can quote the total for the entire season. The number of visits is multiplied by the Rate and Qty to get the **Total**.

Total The system uses the multipliers above to calculate the total. For example, as a default, **Total = Calc x Qty x Rate x Visits**.

B. Hrs The total hours you expect your team to spend on the job. For help with calculating the amount, hover over the **B. Hrs** field and click the **+** button.



Fill in the **Men** and actual **Hrs** fields to calculate budgeted hours.

T.B. Hrs The total budgeted man hours times the number of visits (**B. Hrs X Visits**).

Cost The labor cost for the number of budgeted hours. This typically includes the labor burden of only your regular employees on the job. Other labor costs like subcontractors are accounted for under **Direct Costs**.

T. Cost The system calculates **Qty X Visits X Cost** to get the Total labor cost.

Margin The system calculates the Total minus the cost to get your profit margin.

Markup This applies only to products. It's the difference between what you pay for a product and what you sell it for (wholesale price versus retail price).

Adj Rate Adjust the Rate by entering a percentage or dollar amount you want to add to or subtract from the **Rate** column. If you use the percent sign (**%**), the system assumes it's a percentage. If you do not enter a **%**, the system assumes it's a dollar amount. You can make this a negative or positive number.

For example, you normally charge $45.00 for a service, but the client has obstacles that will make the job take longer. Use the **Adj Rate** field to specify the extra percentage or dollar amount that you need to charge for each line item.

Add Notes to an Estimate

Add additional information by clicking the Note icon on the far right of each line item. 

1. Fill in any of the tabs:

   The "Estimate Desc." tab – Defaults to what is shown at the service level. You might add a more detailed description of what the service includes. To display this to the client, your Grid must contain the **Estimate Description** field.

   The "Job Note" tab – Optionally, enter detailed instructions, OR click **Append** or **Replace** to make the estimate description part of the job note. If you create the job from the estimate, this information will display in the Job Notes for your field resources.

   The "Invoice Desc." tab – Defaults to the description set up at the service level. Change this if needed. Optionally, you can click either **Append** or **Replace** to apply the estimate description to the invoice.

   The "Line Item" tab – Use this optional field for private notes about this line item. Your client will not see this note.

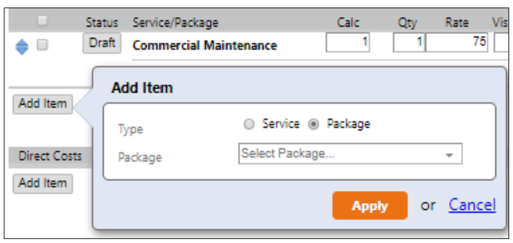
2. Click **Apply**.

Add a Package

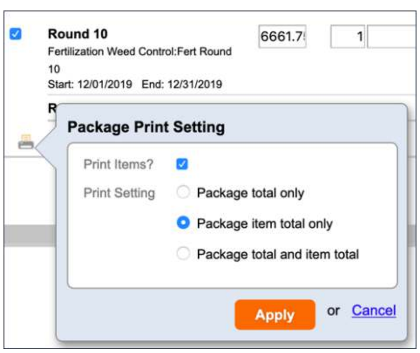
A package is a series of jobs, frequently Waiting List jobs, performed for a client over an extended period, scheduled as rounds. Packages are often created on a company level and then assigned to various clients.

Note that clients cannot select individual rounds of the Package on View My Proposal. They can only select the entire package or not.

1. On the **New Estimate** overlay, click **Add Item.**
2. In the **Add Item** overlay, click the **Package** radio button, then select a package from the dropdown list.



3. Click **Apply**.
4. **Print** – Choose whether the rounds for this package will appear on the estimate by selecting the printer icon on the left of the final package round.

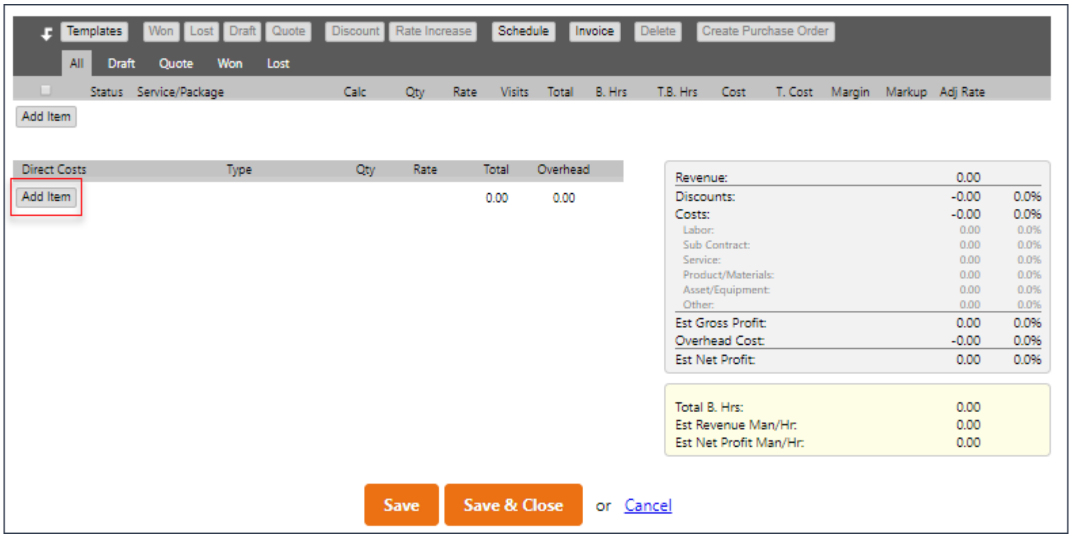


- Select the check box for the package round line items to appear on the estimate.
- Deselect the check box for only the top round to appear.

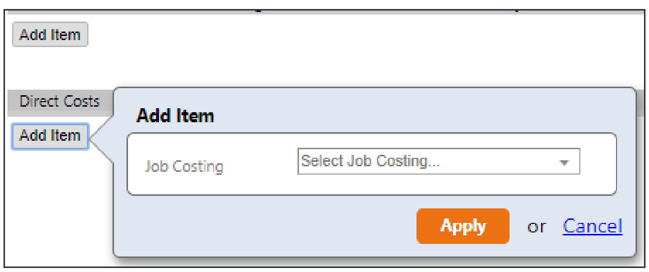
Note: You can set these as default options in **Settings > Estimate Settings**.

Add a Job Costing Item

If you have already set up job costing, follow these steps on the **New Estimate** screen. See "Job Costing for Estimates" on page 41 for more information.



1. Click the **Add Item** button under **Direct Costs**.



2. In the **Add Item** overlay, select a job costing item from the dropdown list.

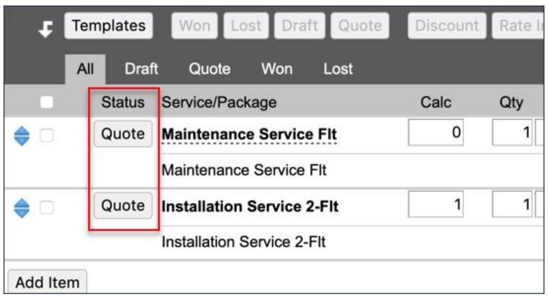
3. Fill in or change any information as needed.

4. Click **Apply**.

Change Line Items to Quote Status

After you have completed the estimate, in the Status column, you need to change each line item's status from Draft to Quote. This allows it to appear on the Estimate Document; and totals also appear in the lower right corner.

1. Click the button in the "Status" column, which defaults to **Draft**, to **Quote** for each line item you want to show on the estimate.



You can click the status button next to each line item.

OR

Select the check box for multiple line items and click the status button above the grid to apply a new status.

2. Click **Save**.

For more information on estimate statuses, see "Change the Line Item Status" on page 47.

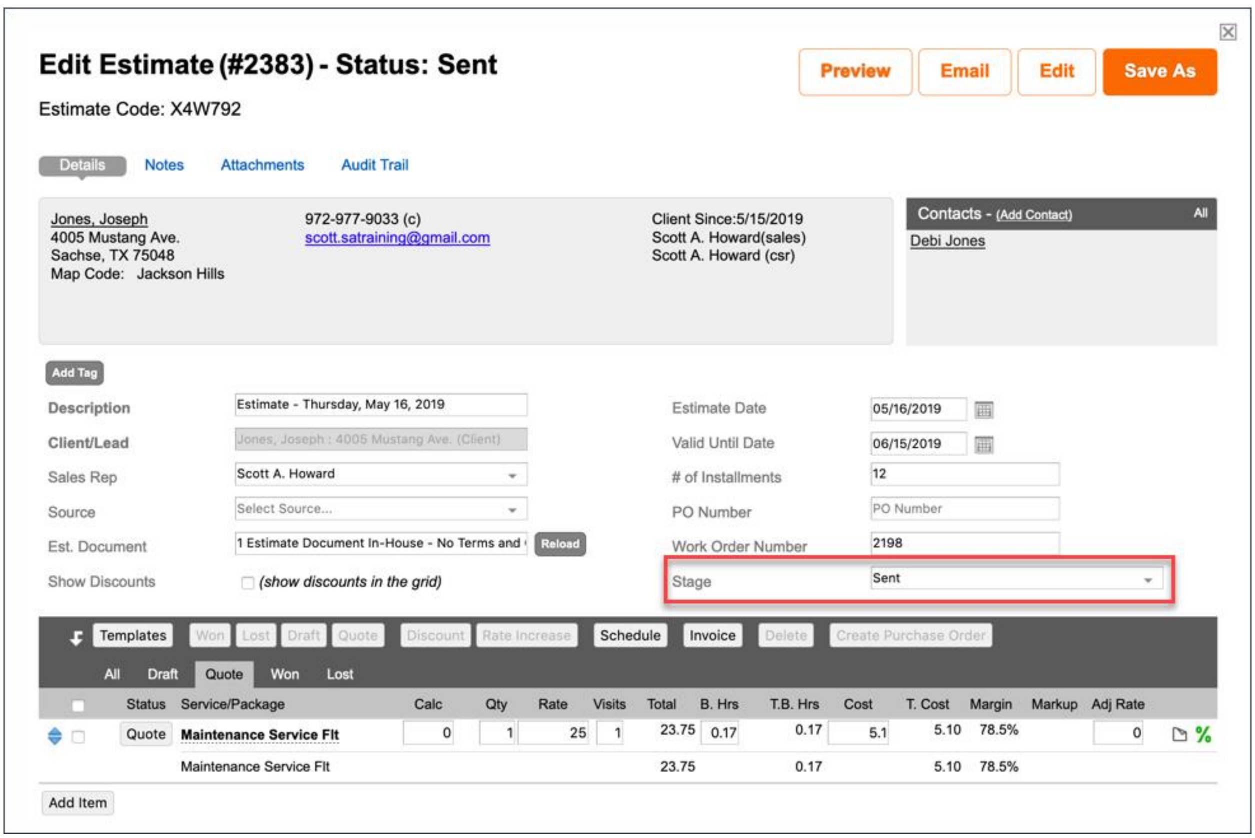
Send the Estimate

1. After you've changed the status of line items to **Quote** and clicked **Save**, click the **Preview** button in the upper right corner of the overlay.

   A new window opens and displays how the estimate will appear to your clients.

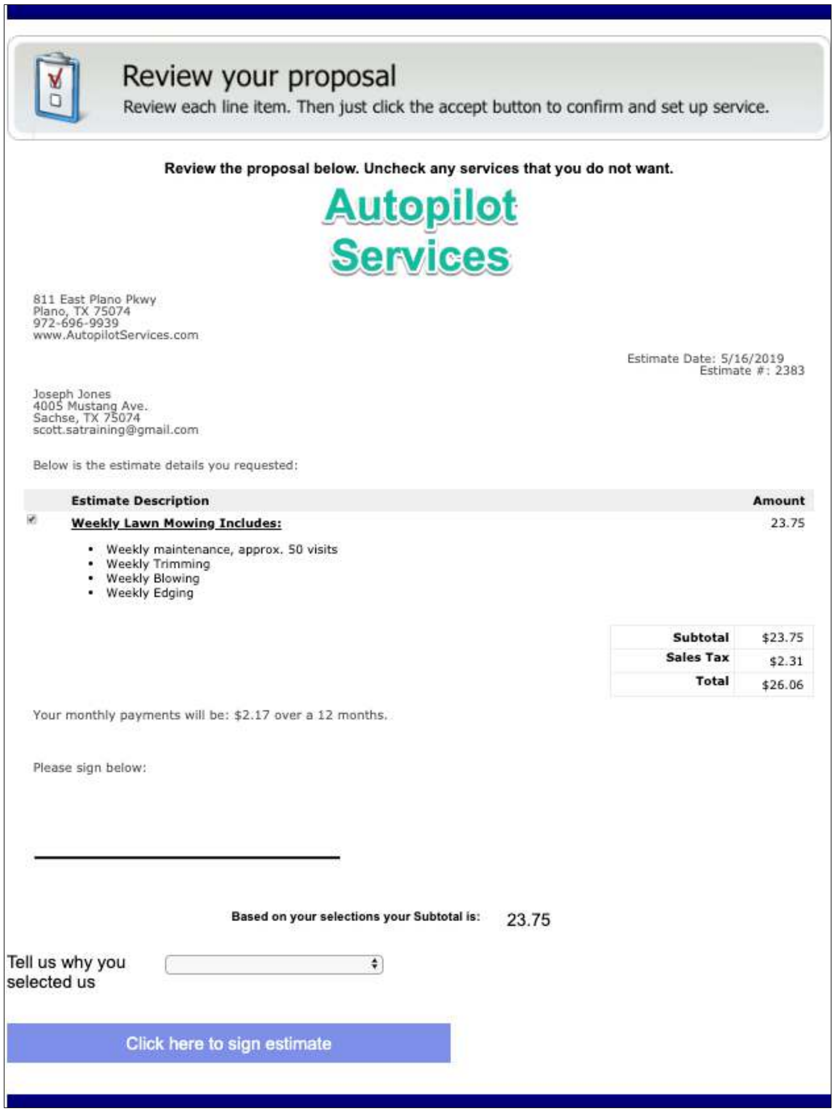
2. If you want to print the estimate, print it from the **Preview** screen.
   OR
   To email the estimate, click the **Email** button.

3. On the Email dialog, click **Send**. The Estimate stage changes to **Sent**.

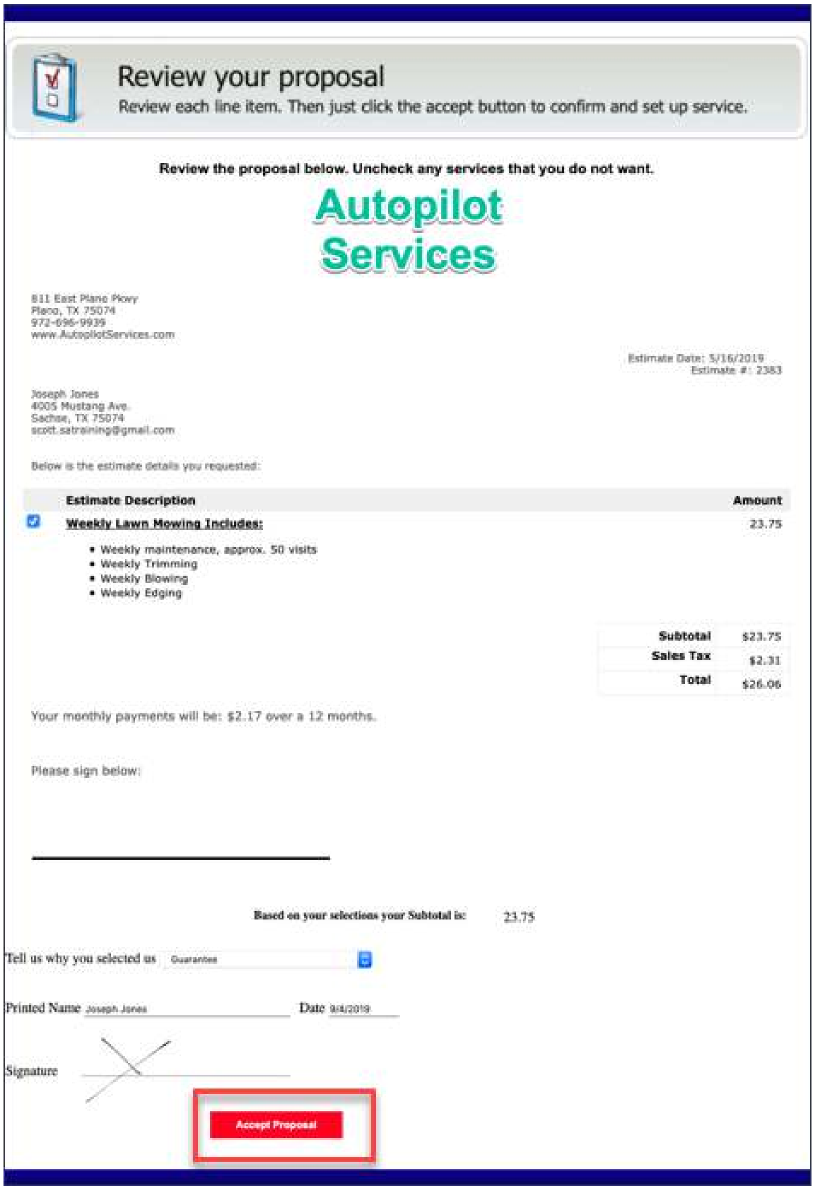


4. If the Client receives the estimate by email, they can click the link in the email to go to the View My Proposal website. Here, they can select services they want and then accept them.

   If you've included a signature line in your document and settings, the estimate will look like this:

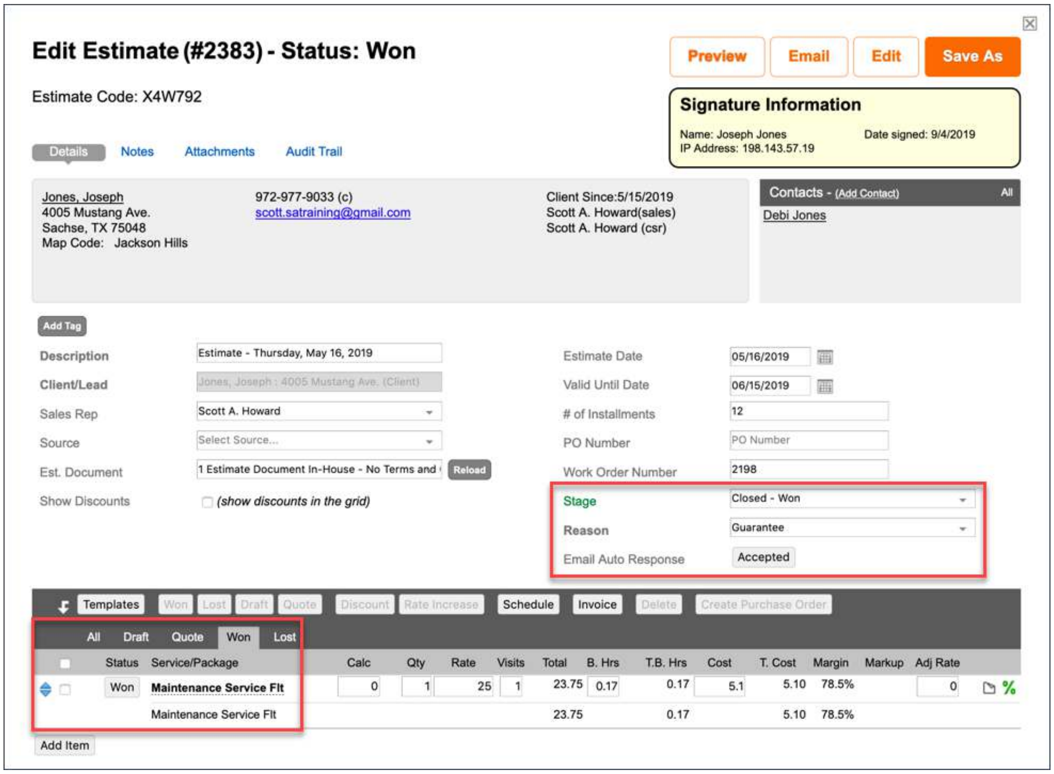


5. After the client signs electronically, the **Accept** button appears. The client clicks this to finalize their acceptance.



6. If you have a confirmation email set up, it will be sent to the client after they accept the proposal.

You'll now see that the **Edit Estimate** screen shows the estimate stage has changed to **Won**.



Sending Estimates from the Legacy App

After you have set up estimates in SA, you can send estimates from the Legacy app.

Basic steps:

1. Turn on User Rights for the Legacy app:
   Go to **Settings > Company >User Roles and Rights > (Role) > "**Mobile" tab, then check the "Enable Estimates" check box.
2. On the Legacy app, go to a Lead/Client account.
3. Tap **View Estimates** and modify any existing estimates.
   OR
   Tap the **Add** (**+**) button and select **Estimates > Create Estimate** or **Create from Template**.
4. Choose any estimate template you've built in SA. (This can have a document template associated with it.)
   OR
   Add line items to the new estimate.
5. Modify the status of line items if needed.
6. Verify that your pricing and descriptions are correct
7. Make sure a document is selected, then email the estimate from the Legacy app.
8. If you're with the client, you can show them the estimate, and they can accept and sign it directly on your mobile device.

Schedule Jobs from an Estimate

When the client accepts an estimate, you can schedule the job from within the estimate. This moves all information from the estimate, including discounts, to the job.

If the client accepts online:

Ideally, the client clicks the email link and accepts the estimate online.

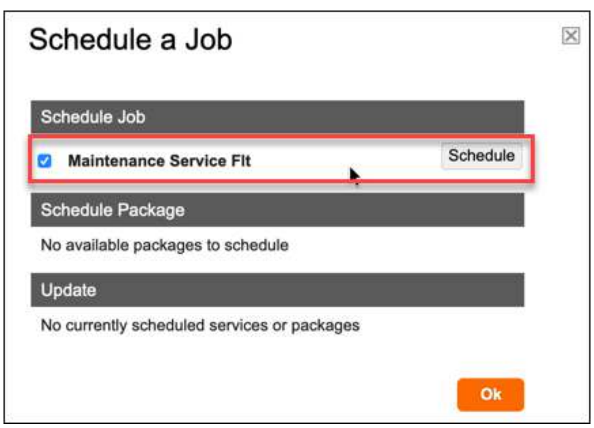
1. Go to **CRM > Estimates** to see the list of all your estimates in SA, and look for the estimate by filtering if needed. (Remember, filters are your friends!)

   You also can go to the client's account to access their estimate.

2. On the **Estimates list** screen, you'll see that your estimate is **Won** in the **Status** column.

3. Click the Estimate number to see the **Edit Estimate** screen. The line items won will be on the **Won** tab.

4. Click the **Schedule** button.



5. On the **Schedule a Job** overlay, select the services you want to schedule. Make sure to schedule each service as the appropriate job type.

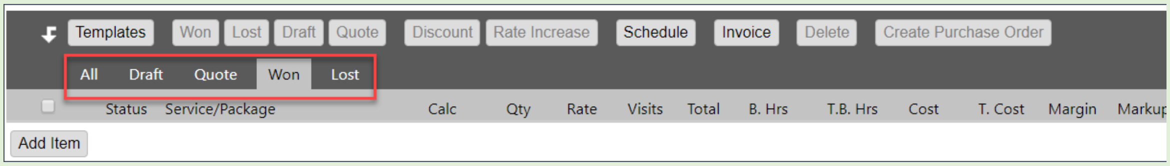
   For example, if a weekly service and a one-time service were both accepted by the client, you would not schedule them together. The weekly service would be scheduled as a recurring job and the one-time service would be scheduled as a one-time or waiting list job.

6. Click the **Schedule** button and select the type of job for this service (Recurring/Waiting List/One Time).

7. Click **OK**. Then schedule your job as you would any other.

   All information from the estimate, including Job Notes, Products, and Invoice Description, go into the job.

Finding Line Items According to Status



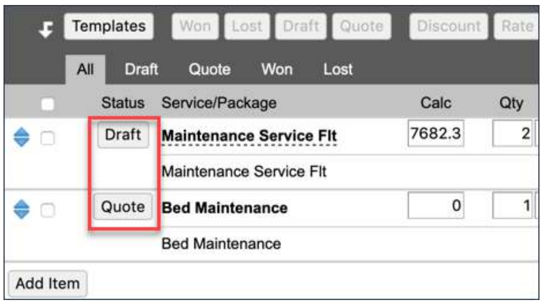
In the center of the **Edit Estimate** screen, the **Status tabs** group individual line items according to their current status: **All**, **Draft**, **Quote**, **Won**, or **Lost**. This can be helpful if you want to look at line items with a particular status.

If the client accepts offline:

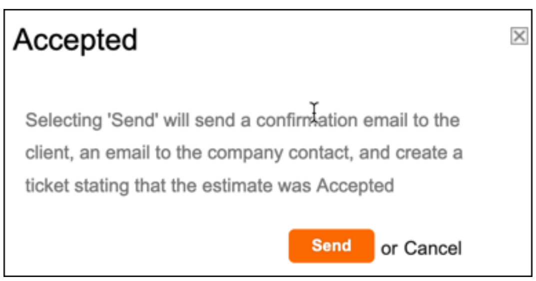
A client might accept by email or any other communication.

1. Go to **CRM > Estimates** to see the list of all your estimates in SA, and look for the estimate by filtering if needed.

2. Click the estimate and change the status from **Quote** to **Won**, then fill in the "Reason" field, if required.



3. If you want to send a confirmation email, click the **Accepted** button for the "Email Auto Response" field. This button appears only when the stage and status are set to **Won**.



4. Click **Send** at the confirmation dialog. This will send a confirmation email to the client stating that the estimate was accepted.

5. Click the **Schedule** button to schedule the job. For instructions, see "Schedule Jobs from an Estimate" on page 32.

All information from the estimate, including Job Notes, Products, and Invoice Description, go into the job.

Advanced Estimate Setup

You might need to do some setup before you create the estimate documents. Some options when creating estimates include:

- **Services** (page 36)
- **Products** (page 38)
- **Rate Matrix** (page 39)
- **Job Costing** (page 41)
- **Estimate Templates** (page 43)

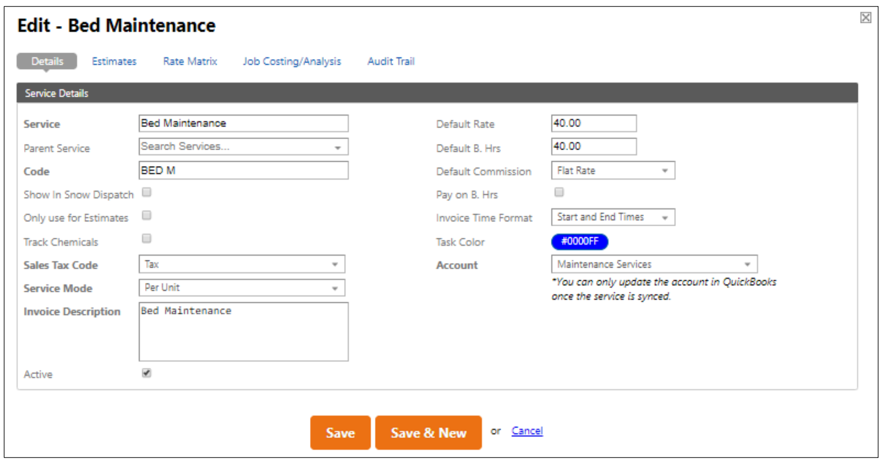
While these items each require some setup, the time you invest will pay off by streamlining your estimate process.

Create Services for Estimates

Services are always part of estimates, so it's best to set up any services in advance. These may include a rate matrix and estimate description. If you don't use a rate matrix, the estimate description uses the invoice description and default rate.

Estimates are affected by various items on the **Services** screen. You might want to adjust some of the following.

Under **Settings > Scheduling > Services > (Service Name) >** "Details" tab:

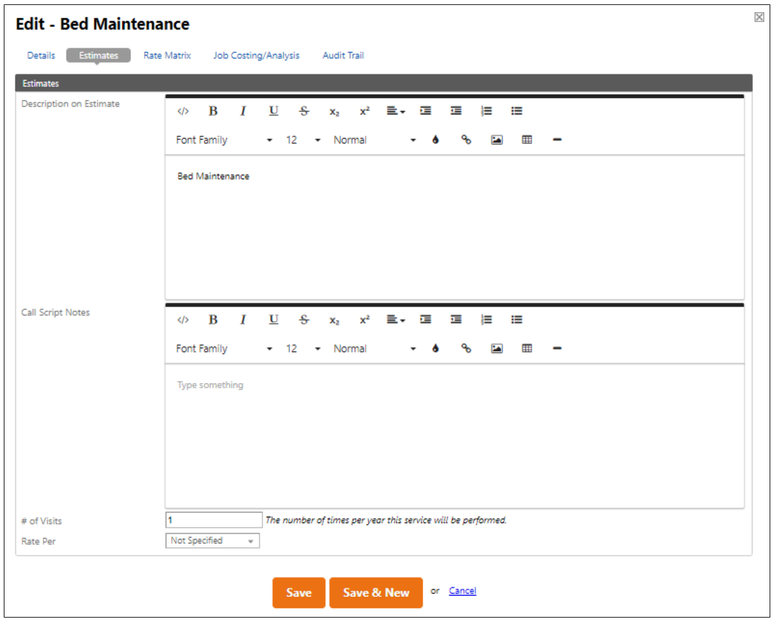


For Estimate Only – Checking this check box means the service will appear on your estimate and is only for presentation purposes on an estimate. It will not appear on any job or invoice.

For instance, you might create an overall service that lists major phases of a turnkey project. It will leave out the detailed descriptions that the client doesn't need to see. You would schedule the details your crew needs in the jobs, once you win the estimate.

Note: If you add a service marked as "Only use for Estimates," that service can be added only as a "sub item" on an estimate.

Under **Settings > Services > Edit Service >** "Estimates" tab:



Description on Estimate	Enter the description for this service, which will appear on any estimate containing the service.
Call Script Notes	Optionally, add quick reminder notes for sales and other staff to mention if they are on the phone with the client. For example, "Our monthly service includes xyz, and we are currently offering a discount to new clients through the end of this month." To see the notes, the sales rep goes to the **Estimate** screen where you've added the line items. Any line item with a call script note has a dotted underline that indicates there are notes. The sales rep can click the service to see these notes.
Number of Visits	The number of times per year the service will be performed. This number defaults to 1 on the Estimate screen.
Rate Per Visit	Type in the rate in the "Rate per Visit" field to create a default price. Note that the "Rate Per Visit" option is the only functional option.

Set Up Products for Estimates

If you include products on your estimates, you must have a service on the estimate first.

1. Under **Settings > Scheduling > Products**, do one of the following:

   On the "Non-Inventory" tab, click **Add Non-Inventory Product**.

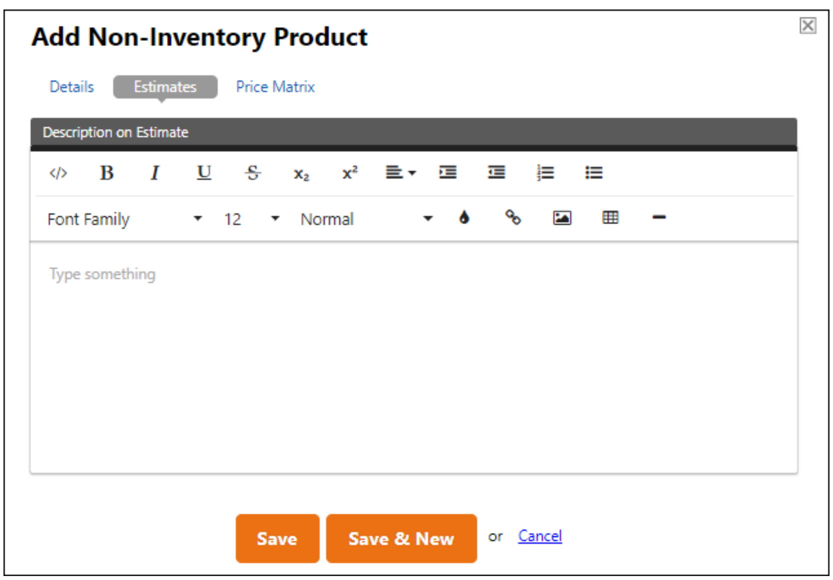
   OR

   On the "Inventory" tab, click **Add Inventory Product**. This might be used if you are syncing with QuickBooks.

2. On the "Details" tab, fill in all required **bold** fields, and any other fields as needed:

Default B. Cost	What you pay for the product.
Default Rate	What you'll charge the client for the product.
Default B. Hrs	Estimated number of man hours to install that individual product. Once you add a quantity of the product, the system will multiply it by the budgeted hours to help you estimate the total time for a job.

3. If you want to show this product on estimates, go to the "Estimates" tab, and add a description for the product that will appear on the estimate.



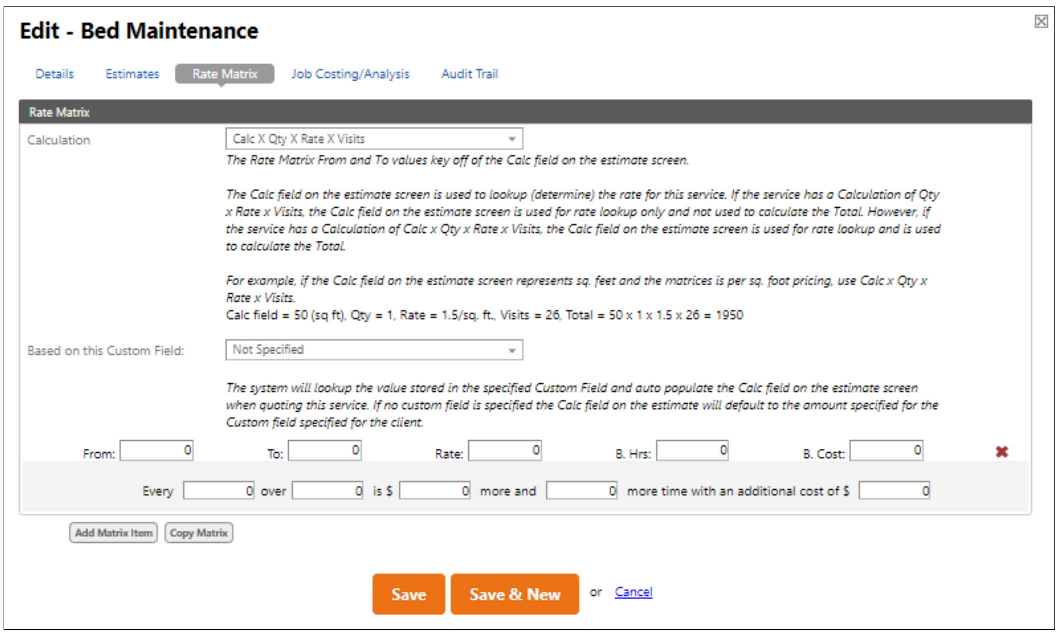
4. Optionally, on the "Price Matrix" tab, enter the **From** and **To**, **Rate**, **B. Hrs**, and **B. Cost**.

Create a Rate Matrix for an Estimate

Similar to a pricing sheet or scale with different levels of pricing, the Rate Matrix calculates the price of a service based on values in your custom fields. When creating an estimate, the pricing will be automatically filled in for that service, and you can edit it if needed. Rate Matrixes are typically used for a Flat Rate service mode.

You can base the Rate Matrix on variables such as the square footage of a house or lawn. Or if you use Rate Matrixes on subservices, you can factor in more complexities of a property. To set up custom fields, go to **Settings > CRM > Custom Fields.**

1. Go to **Settings > Scheduling > (Service) > Edit**, then click the "Rate Matrix" tab.



2. In the **Calculation** dropdown list, select the calculation for this item. A simple one is **Qty X Rate X Visits**.

3. In the **Based on this Custom Field** dropdown list, select a custom field that's already set up. The system will use this field to calculate pricing.

4. Set the minimum price range for this service in the **From** and **To** fields. For any range of between the **From** and **To** fields, your service will be charged at that minimum price.

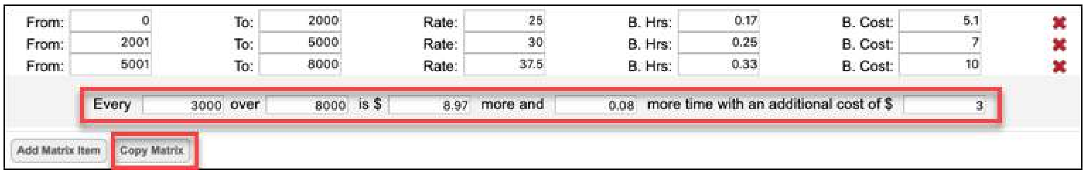
   In the example below, the range is 0 to 1000 square feet at a rate of $40.00.

5. For 1-to-1000 square foot range, enter the rate, budgeted hours (man hours), and budgeted cost (the average labor burden for the estimated budgeted hours).

6. Click **Add Matrix Item** to add another line for the next level of pricing. Add as many more lines as needed.

7. If your rates and ranges go up at equal increments, you can fill in the bottom fields to cover all additional scenarios.

   In this example, for every 3000 square feet over 8000, the range goes up at an equal rate of $8.97.



   The **Copy Matrix** button can copy matrix line items from another service. Note that the **Copy Matrix** button does not copy the **Calculation** field or equal increment pricing fields at the bottom.

8. Click **Save**.

Job Costing for Estimates

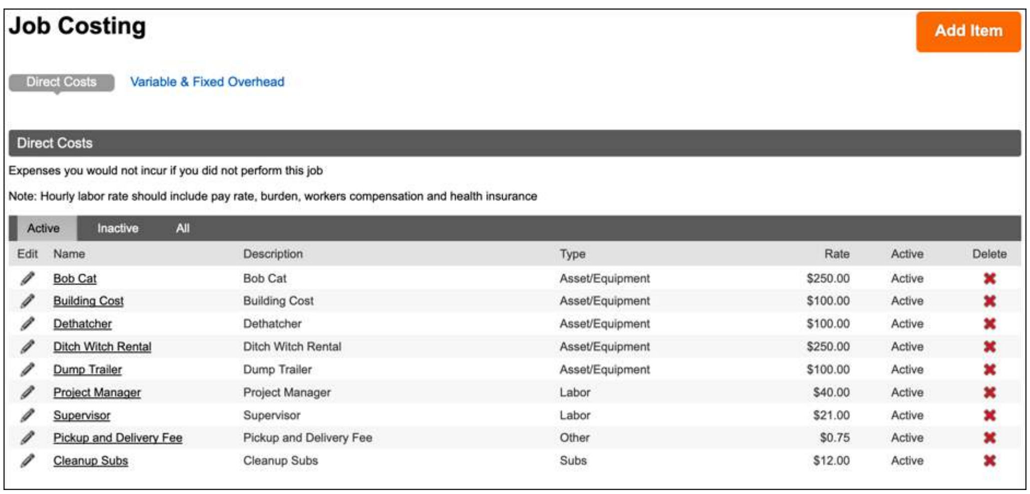
Job costing is not required for doing estimates, but industries that use a lot of products, such as landscaping, might benefit from job costing to keep track of variable and fixed costs, and also to determine a more accurate profit margin. You also can use Direct Costs to account for hourly wages for contract employees. For your own salary and office staff and expenses, you'd charge these to Variable & Fixed Overhead—in other words, your cost of doing business.

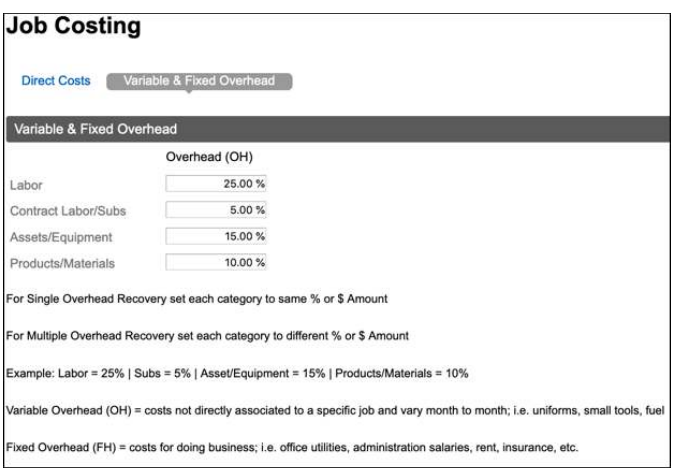
Using job costing in SA can help you assess your budget for a job, and determine whether the revenue will be enough to make the job worthwhile.

Set Up Job Costing Items for Estimates

You can set up job costing for estimates under **Settings > Accounting > Job Costing**.

On the "Direct Costs" tab, include overhead items that aren't consistent, such as fuel, maintenance, additional products or staff, and equipment rental. These are direct costs necessary for doing the job.



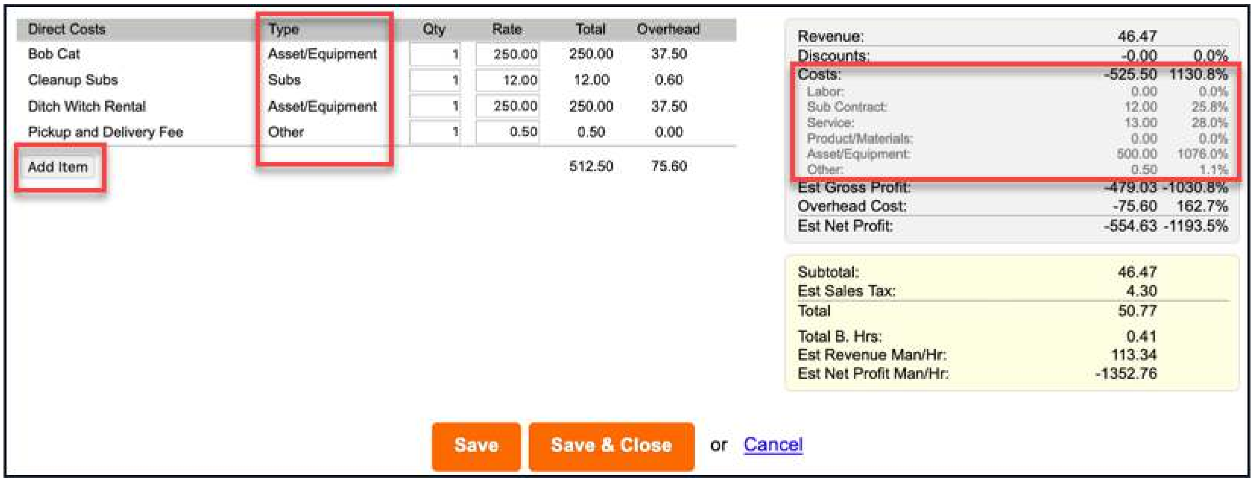


On the "Variable & Fixed Overhead" tab, include the cost of doing business. These are indirect costs, such as salaries for office staff, office rent, and equipment maintenance.

Add Job Costing Items to an Estimate

After you set up job costing and add it to an estimate, your costs are listed by type in the **Costs** section on the right side of the screen below.

1. In an estimate, click **Add Item** in the Costing section on the lower left of the screen.



2. Select a job costing item from the **Add Item** dropdown list.

3. Fill in the **Qty** and **Rate** fields for the item.

   Qty is multiplied by the rate to get the Total, which is your direct cost.

   Rate is the per-unit rate. For instance, you would estimate the number of hours for a resource, or the miles you will drive if you charge by the mile.

   Overhead is the “Variable & Fixed Overhead” set up above, such as labor and assets and equipment. In the example above, these are set up as a percentage of your direct costs for that type.

4. Click **Save**.

Estimate Templates

It's a good practice to build out some job estimate templates with products and services you typically bundle together. This will save you time when you create estimates.

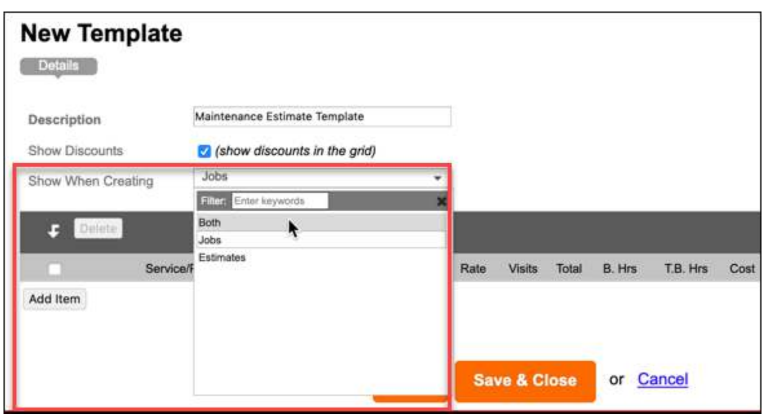
For example, an estimate template for a construction service might include subservices of demo, build, and cleanup. Within each of those subservices, you can include products to help you track your costs.

Then, you'll be able to quickly create a new estimate, even while you're on the phone with a client or lead. From the **Clients** or **Leads** account screen, click **Add Estimate**, select the pre-made template you've already set up, and customize it on the fly.

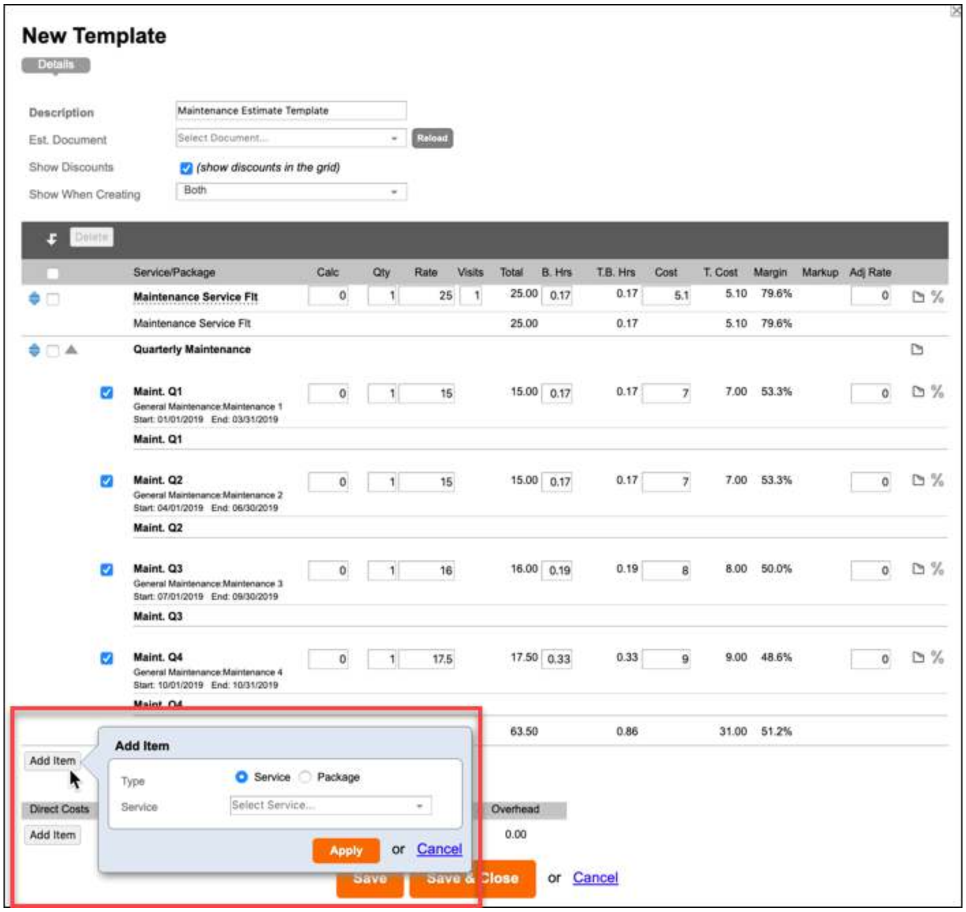
If you're talking to a client, click the **Quote** button for any service they are interested in.

Build an Estimate Template

1. Go to **Settings > CRM > Job/Estimate Template**.
2. On the **Templates** screen, click **Add Template**.
3. The **New Template** screen appears.
4. Add a name for the template in the **Description** field.
5. For **Show When Creating**, select **Estimates** from the dropdown list.



6. For **Est. Document**, select the Estimate Document you want to use.
7. Add a service to the template under the services area by clicking **Add Item**, then selecting a service from the dropdown list. Optionally, add other typical services you offer. It makes sense to choose your most popular services first, so they'll display at the top of the estimate when you load the template.



8. Leave the **Calc**, **Qty**, **Rate**, and other cost fields to be filled in automatically. You can adjust them for the individual client when you create the estimate.

9. To add subproducts or subservices to any line item, hover over the line item next to the **Calc** field and click the **+** button that appears. Select a subproduct/subservice, then click **Apply**. Add as many as needed.

10. Under **Direct Costs** below the list of estimate line items, click **Add Item** to include additional costs associated with the service, such as a special piece of equipment or additional labor like subcontractors.

11. Click **Save & Close**.

Now, within an estimate, click the **Templates** button, and choose a template to customize as needed for the client.

Manage Estimates

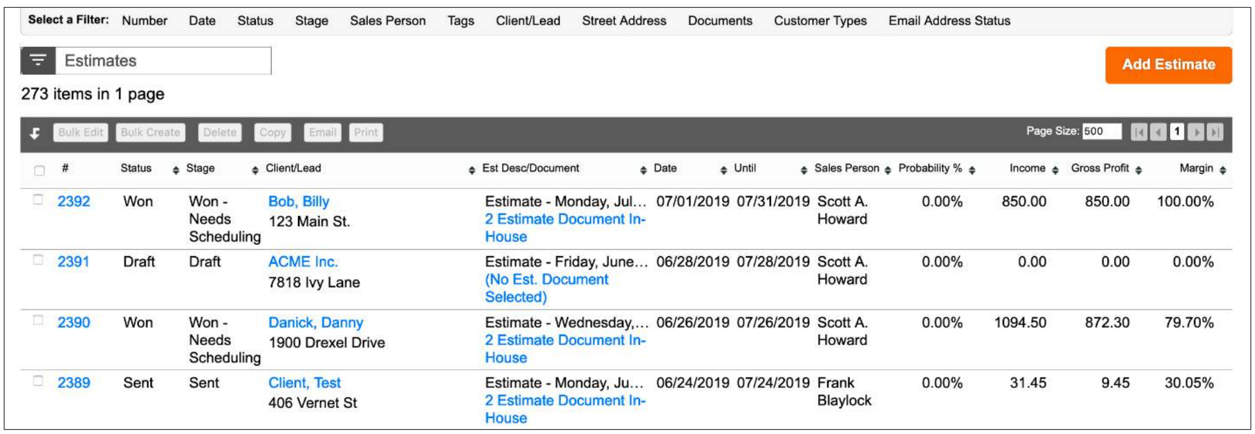
You can manage all your Service Autopilot estimates for any client or lead on the **Estimate List** screen.

Check the Estimate List Screen

Go to **CRM > Estimates**.

This screen shows all the estimates you have in SA. On this screen, you can focus on certain types of estimates using the filters at the top of the screen.

A couple of common filters are by stage and sales representative.



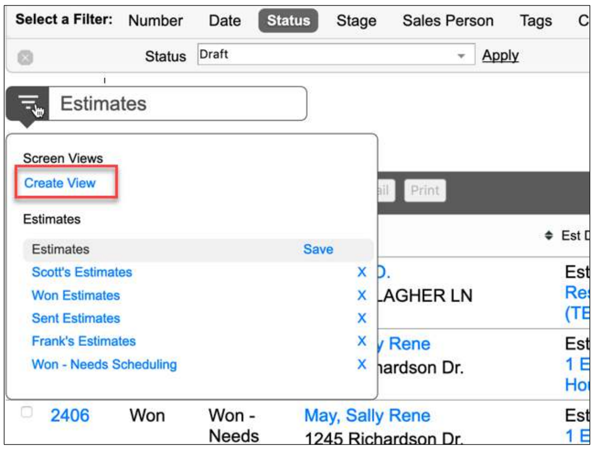
For example, click either or both the **Stage** and **Sales Person** filter at the top of the screen, then make a selection from the dropdown list.

Create a Custom View

On many list screens in SA, you can create a custom view that saves the filters you want. On the **Estimates List** screen, you might create a view called "Draft Estimates" or "Won Estimates."

1. On the **Estimates List** screen, select and apply the filters you want.

2. In the **Estimates Screen Views** dropdown list, click "Create View."



3. In the **Screen View** overlay, type a name for the custom view, such as "Draft Estimates."

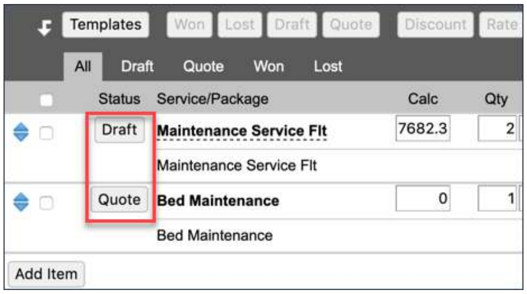
4. Click **Save**.

   This view will now be available in the dropdown list for quick access for your login. Each SA user creates their own custom views, and they can't be shared with other users.

5. After filtering your **Estimate List** screen, click an estimate number to see the estimate.

Change the Line Item Status

Within an estimate, you can change the status for individual line items or in bulk.



Clicking the status button next to each line item lets you change that line item to a different status.

This button toggles through all the statuses—**Draft**, **Quote**, **Won**, and **Lost**.

To make a bulk change to statuses, select the check box for the line item, then click the appropriate status button at the top.

Use Stages to Streamline the Estimate Process

The estimate stage is a customizable category that lets you track where an estimate is in the process. Stages can be helpful in many ways:

- Consider the stage of current estimates to project your upcoming income.
- Find out what estimates have been won and are now ready to be scheduled.
- Build automation triggers based on the estimate stage.

Stages apply to the entire estimate, while the status applies to individual line items.

Four stages come pre-loaded in SA:

- Closed – Lost
- Closed – Won
- Draft
- Estimate Sent

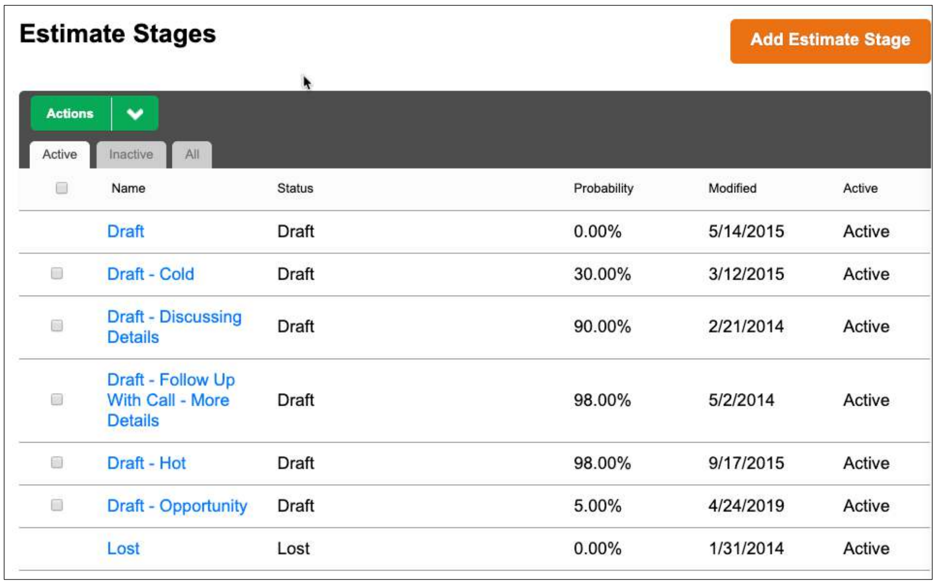
The system automatically assigns these stages as estimates pass through the process. You can create additional stages to assign to individual estimates. You also can edit the default stages that SA supplies.

For example, you might change the default name from “Closed – Won” to “Won – Needs Scheduling” so that when you win an estimate, it will automatically be assigned this stage. This stage serves as a reminder to your team. Once it’s scheduled, it can be changed to something like, “Won and Done.”

Add or Edit an Estimate Stage

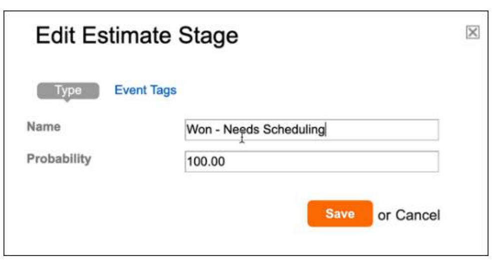
You can add or edit an estimate stage using the same process.

1. Go to **Settings > CRM > Estimate Stages**.
2. Click the **Add Estimate Stage** button.



Name	Status	Probability	Modified	Active
Draft	Draft	0.00%	5/14/2015	Active
Draft - Cold	Draft	30.00%	3/12/2015	Active
Draft - Discussing Details	Draft	90.00%	2/21/2014	Active
Draft - Follow Up With Call - More Details	Draft	98.00%	5/2/2014	Active
Draft - Hot	Draft	98.00%	9/17/2015	Active
Draft - Opportunity	Draft	5.00%	4/24/2019	Active
Lost	Lost	0.00%	1/31/2014	Active

3. In the Overlay, fill in a name such as “Won - Needs Scheduling.”



Now, when you go to the **Estimate List** screen, you can filter by this stage to see which estimates need to be scheduled.

Once scheduled, you can change the estimate stage to the next one, like “Won and Done.”

Assigning Probability in Estimate Stages

In the **Add Estimate Stage** overlay, you can add your judgment on the likelihood that you'll win the estimate, in the **Probability** field, as a percentage.

For example, your client has verbally confirmed they will accept the estimate. Because you have a high confidence level, you might assign a 95 percent probability of winning the estimate. You might label this stage as "Sent – Hot" and make similar stages for different levels of probability, like "Sent – Warm" and "Sent – Cold." You can then filter the **Estimates** screen by stage to help with planning.

Pro Tips for Stages

- Change the "Won" estimate stage to "Won – Needs scheduling" so you can search on these quickly.
- Automations can be triggered by stages. For instance, you might create a Ticket for estimates that reach the stage "Won – Follow Up." For more information, see the *Automations User Guide*.
- Don't delete lost estimates. Contact them in a month or a quarter in case they are not satisfied with the vendor they chose. On the **Estimate List** screen, you can do a bulk edit on estimates with a "Lost" stage and change that stage to "Lost – Re-contact."

Estimate Reports

You can run a report on estimate stages to help plan for projected revenue and staffing. Go to **Report Center > SA Reports > Estimates By Stage**. You can run this report based on criteria like Date Range, Sales Rep, and Stage.

You can even run a report to look back at the accuracy of projections made in the past.

The Report Center offers these estimate reports:

- Estimates by Stage
- Estimated Value Vs Actual Value
- Won Estimates by Service
- Won Estimates Service Products

You also can create a custom analysis for your estimates. In the Report Center, select **Create Analysis > Estimates**.

Appendix: The Settings - Estimates Screen

Under **Settings > CRM > Estimate Settings**, the **Settings – Estimate** screen contains these fields.

Show Grid Lines	Select the check box to show grid lines on the Estimates Grid. (This applies to only the legacy Document Editor.)
Grid Column Name - Rate	You can supply different text instead of "Rate" for the column heading. (This applies to only the legacy Document Editor.)
Grid Column Name - Quantity	You can supply different text instead of "Quantity" for the column heading. (This applies to only the legacy Document Editor.)
Grid Column Name - Amount	You can supply different text instead of "Amount" for the column heading. (This applies to only the legacy Document Editor.)
Margins	Set the left, right, top, and bottom margin for the estimate. (This applies to only the legacy Document Editor.)
Show Discounts	Discounts will appear in the estimate grid by default.
Print Package Items	This is the default setting for how package jobs will display prices on an estimate. When checked, individual package rounds will appear on the estimate by default. If checked, you have the option to choose whether to show the total of each round, the total of the package, or both, in the "Amount" column on the grid. You can change these settings for individual packages on the estimate.
Print Products on Estimate	This is the default setting for whether products will appear as line items on the estimate. You can change these settings for individual line items on the estimate.
Show Products on Invoice	This is the default setting for whether products will appear on the estimate invoice. If you schedule a job from the estimate, this invoice setting carries over to the job.
Confirmation Email	Insert an email address if you want the system to send you an email when an estimate has been accepted by a client online to an email address other than your company email address, which is the default. The notification will be sent to the email address in the field.

Default Number Of Installments	The number of installments will default to the number you select.
Default Estimate Items as Won	This setting defaults to "Checked." Depending on your selection, quoted services will appear in **View My Proposal** as checked (Won) or unchecked (Lost) when the client views the estimate online.
Disable Document Selection	Checking this prevents someone creating an estimate from choosing an estimate document. If you check this, the only way to add an estimate document is from an estimate template.
Allow Scheduling of Zero (0) Qty Products	Check this to list products without a quantity required. This allows you to show a product with a flat rate for the overall price of a product. You might use this if you know how much to charge for the product, but don't know how much you'll use.
Require an Estimate Reason (Won/Lost)	Checking this requires the client or employee to specify why the estimate is won or lost on the **View My Proposal** page and **Estimate** screen. You can add additional Estimate Reasons under **Settings > Estimate Reasons**.
Allow Signature Capture on View My Proposal	Check this if you want online estimates to include an electronic signature. You must also have the merge tag for "signature line" in your estimate document. This setting must be enabled for the merge tag to work.
Show Subtotal on View my Proposal	Check this to have a subtotal line at the bottom of the online estimate. The services that the client selects are added to create a subtotal. For this to work, the estimate grid must include the "Amount" field for the service.