Tidy Academy

PROJECTS

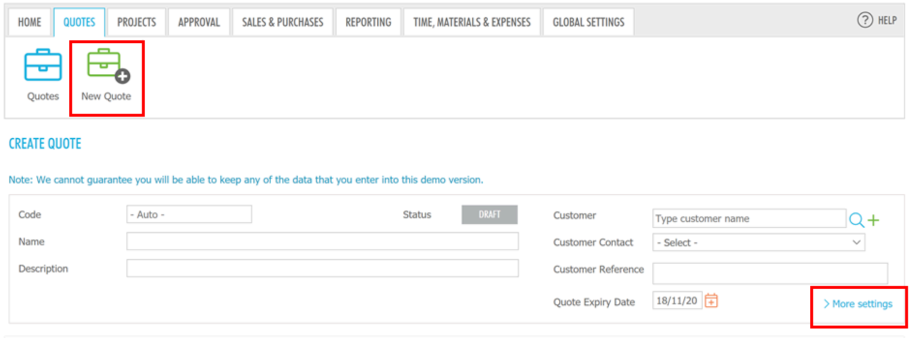
How to create a quote

OVERVIEW

Quotes allow you to present the estimated time, cost, material, tasks, etc. for a project.

STEPS

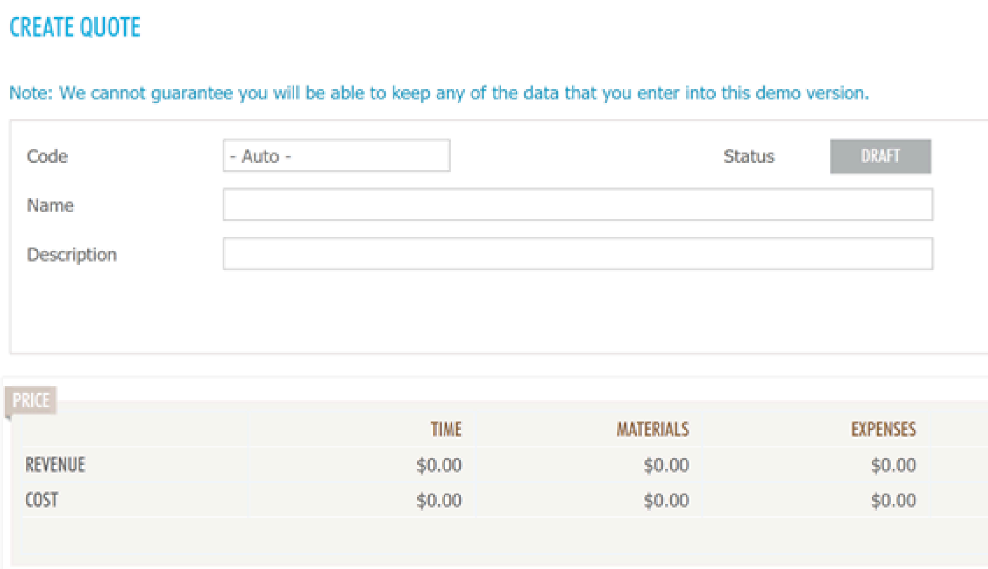
Go to the **Quotes> New quote** to create a new quote. Expand the **More settings** to see the full section of general information and fill in the detail.



Code: If you leave the quote code blank, it will generate an automatic code. This must only contain capital letters, numbers.

Sales Person: The user primarily responsible for the quote - they must have the **Estimator role**. Other team members can be added on the Role Assignment tab to co-manage the quote.

Materials Under Tasks: If this feature is enabled, you can use the mandatory option to require all materials in the Material Plan be assigned to a specific task.

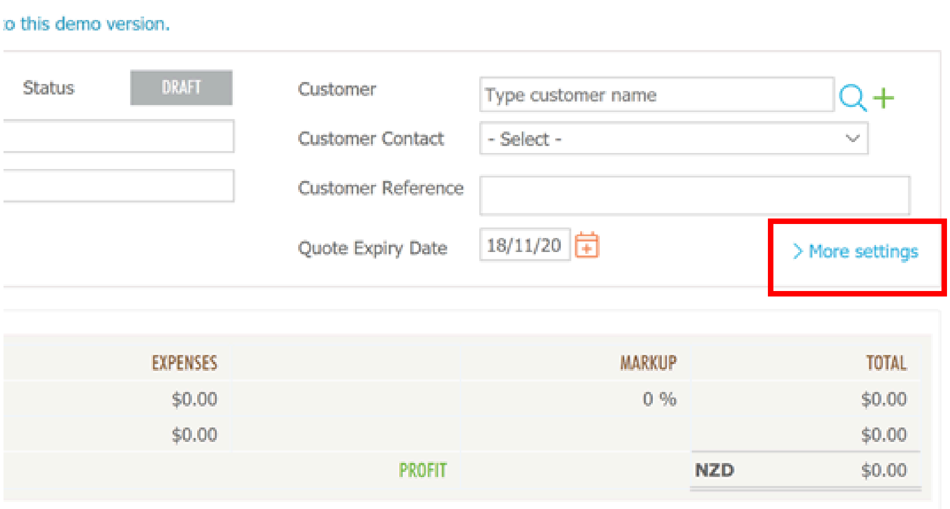


CREATE A QUOTE

Tidy Build

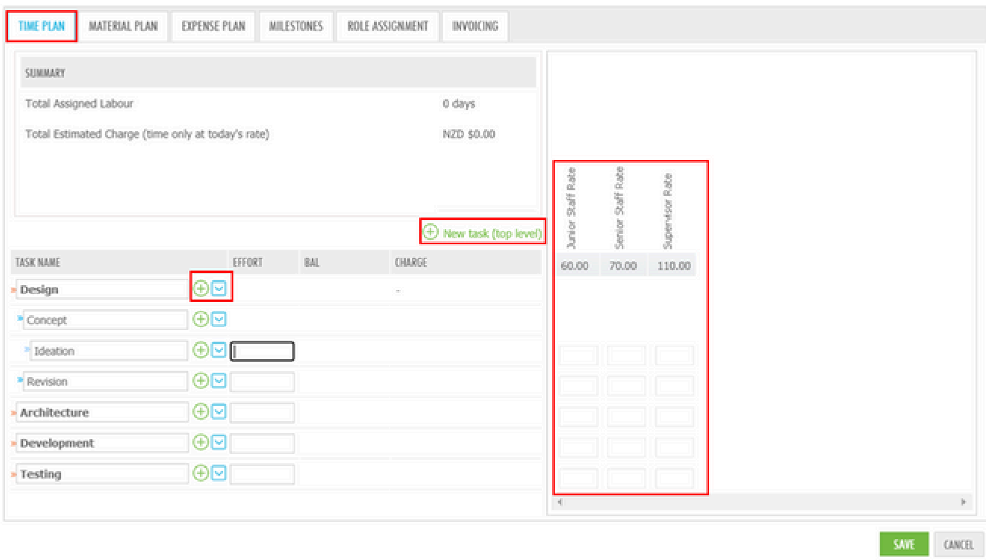
Expiry Date: The date the quote will expire on if the customer has not accepted it.
Project Start Date (optional): The estimated start date for the project.
Project End Date (optional): The estimated end date for the project.

Project Group: The logical group to which your project belongs (groups are configured by your Resource Administrator).



In the **Time plan** tab, you indicate the expected labour resource used for the project.

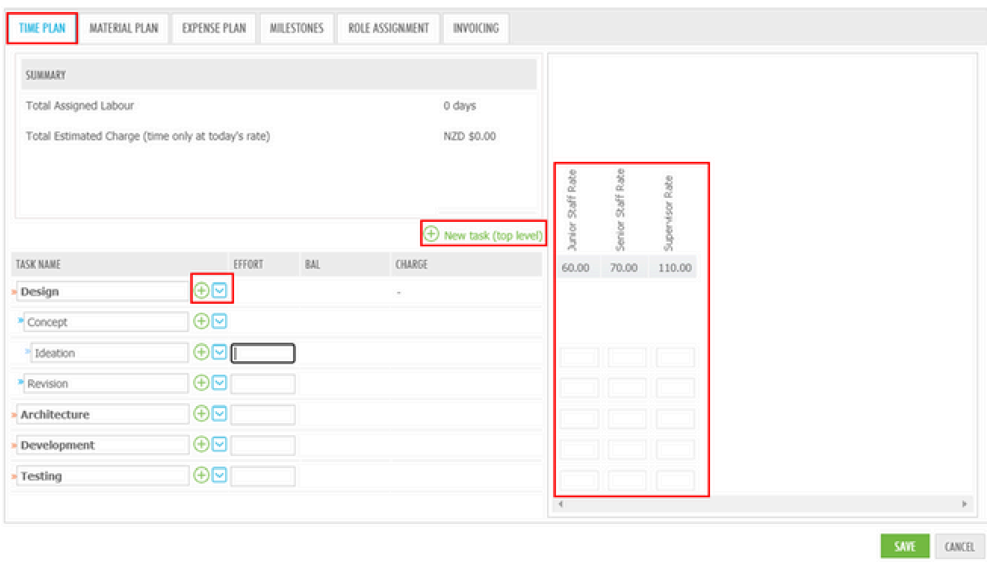
In the top left there is a **summary**, based upon the tasks that you enter. On the right are the **charge rates**, which you indicate effort against. At the bottom of the panel is the **task list** (which begins with one empty task).



Enter the **Task name** and click **New task (top level)** to add other top-level tasks.

Click the **green plus** icon beside the task name to add **next level child task** or click the **blue arrow** icon and select **New child Task.**

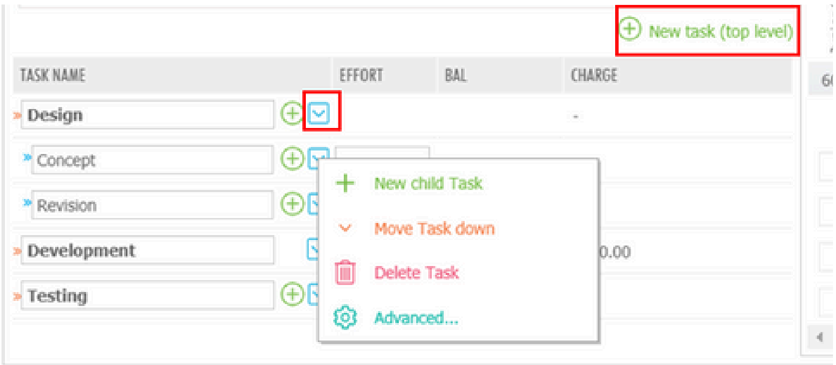
Note: TidyBuild supports unlimited task hierarchies. If you want to create a sub-task, you need click the plus icon in the level-up tasks.



CREATE A QUOTE

Click the **blue arrow** to:

- **Move** a task up/down the list.
- **Delete a task.** You have to clear the **Charge Rate** field, **Effort** field, **delete the child task**, to be able to delete the parent task (this cannot be done once time has been entered).



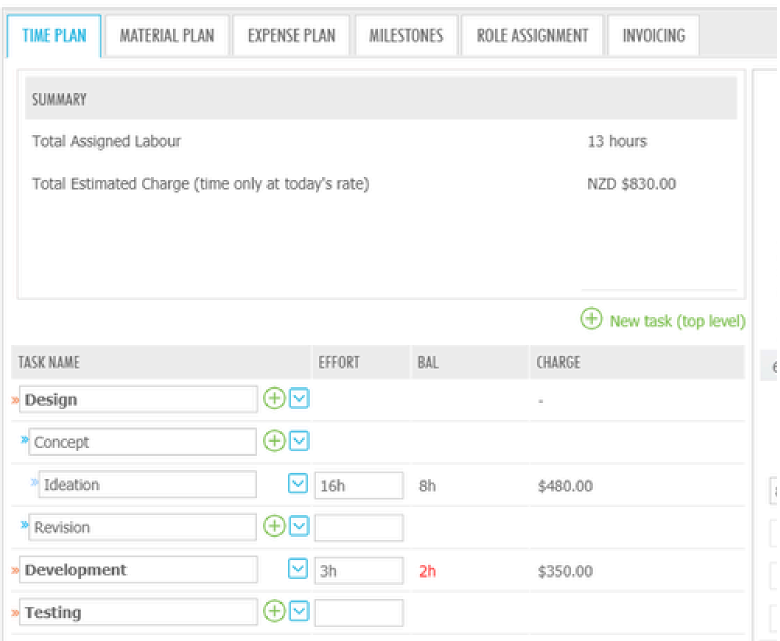
The **Advanced** menu, under the **blue arrow**, allows you to:

- See **Task descriptions**. This description is available when hovering on the task list in the Quote Console, and is displayed on the generated Quote Document.
- Select **Non-billable tasks**. Non-billable tasks are highlighted with a blue background on a Time and Materials quote. All tasks on Overhead, Non-Billable and Fixed price projects are non-billable by default and cannot be changed.

Effort is the number of hours required to complete the task. A task cannot be deleted unless the Effort estimate is blank.

Bal is the number of hours in the Effort that are unassigned. This figure will appear in red if the task has been over-assigned.

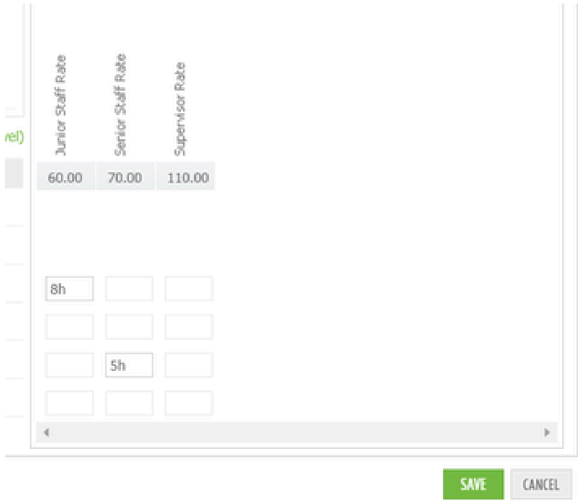
The **customer charge**, based upon the charge rate and hours applied is the **Charge**.



CREATE A QUOTE

Charge Rates are the number of hours at each Charge Rate. The sum of these is used to calculate the balance column.

The **Time cost** for Quotes is calculated based on the **Quote Cost** set for each Charge Rate. If no **Quote Cost** is set, the cost will default to the global cost rate.

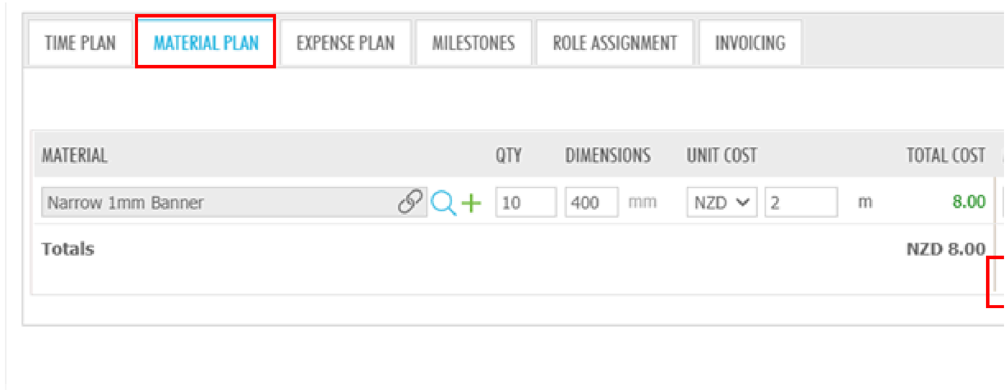


In the **Material plan** tab you can set a **budget** for billable and non-billable materials to be used in a Quote.

Click **New Planned Material**, click the **telescope** icon to search for a material, or click the **plus** icon to create a new material.

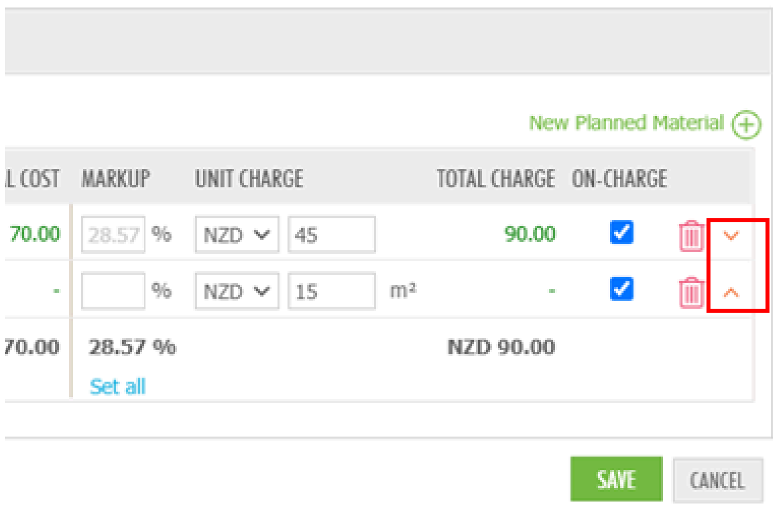
Type in the **quantities** of this material for the quote.

The **dimensions** and **cost** are obtained from the material list, but can be **overridden**.



If the **Markup** is greyed, it's showing how much markup is in the **Unit Charge**. When this field is edited, the value will be displayed in dark and the **Unit Charge** will be based on the margin of markup over the Unit Cost. Deleting the value will return the Unit Charge to its previous price.

Click the **Set all** to set the markup or margin for all material items - this will **override** values and charges.



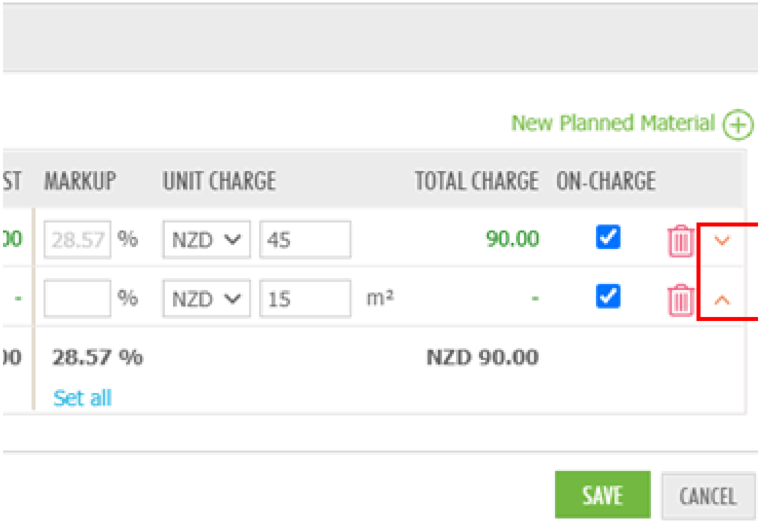
CREATE A QUOTE

The **Unit charge** is the charge for each of the items. This is obtained from the material list, but can be overridden.

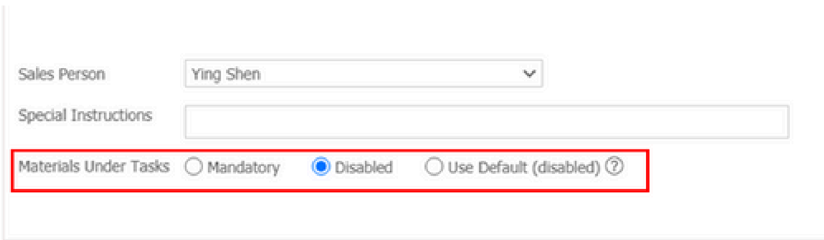
The **Total charge** is the **Unit Charge** multiplied by the **Quantity.**

If the **On-charge** is selected, the **material charge** will be passed through to the customer invoice (when approved).

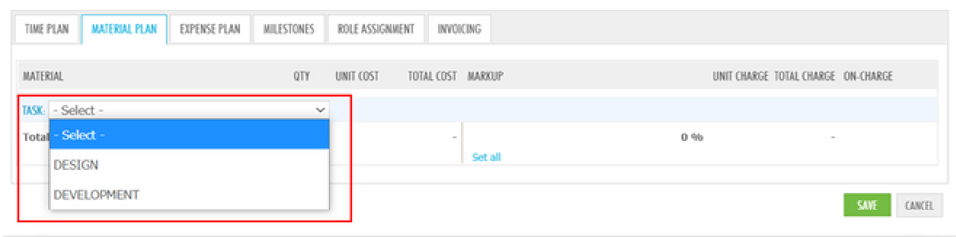
Click the **orange arrow** icon to move the material up or down.



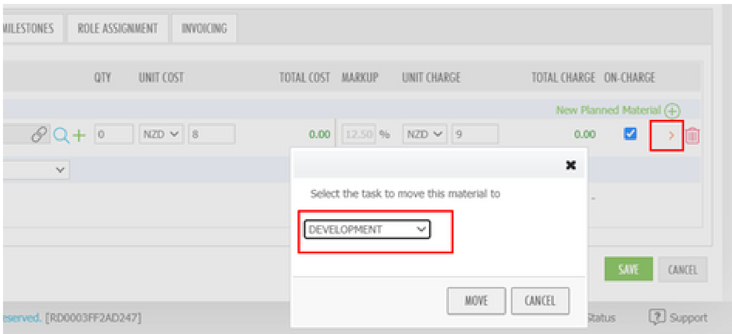
If you're using the **Materials Under Tasks** feature, the **Quotes Material Plan** works a little differently. You can turn on this feature in **More Settings** for this quote, or turn on this feature for all quotes under **GLOBAL SETTING > Company**.



Choose the **task** you want to add **materials** to. Then add materials directly to that task, as the steps explained above. If you have other tasks in your Quote, you will have the option to add them to the **Material Plan**, and then add materials to those tasks too.

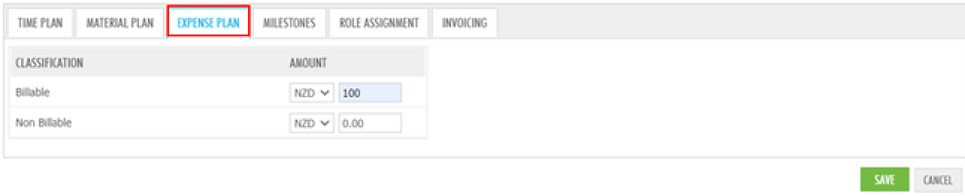


If you need to move the material to a different task, use the **orange arrow** icon at the far right of the material. From here you can select the task you wish to move the material to.



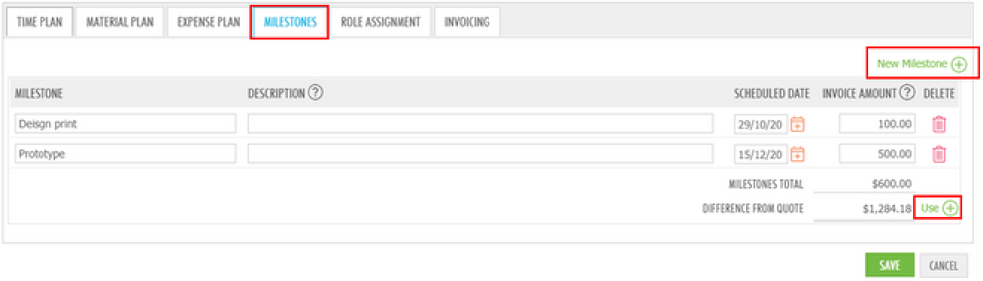
CREATE A QUOTE

In the **Expense plan** tab enter the amount of **billable expense** and **non-billable expense** and select the **currency**.



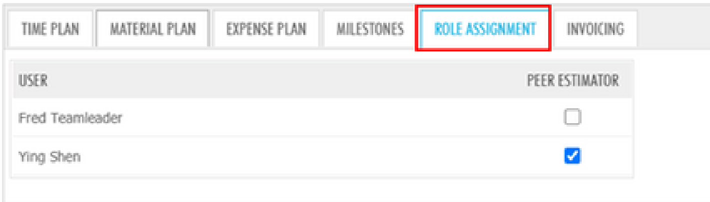
Click the **New Milestone** or **Use** to add the milestones, enter the milestone name and description. The description is optional and included on the invoice for invoice-able milestones.

Enter the **date** or select a date from calendar for this task. Click the **bin** icon to delete a milestone.



Under the **Role assignment** tab you can select the **peer estimator** for this quote.

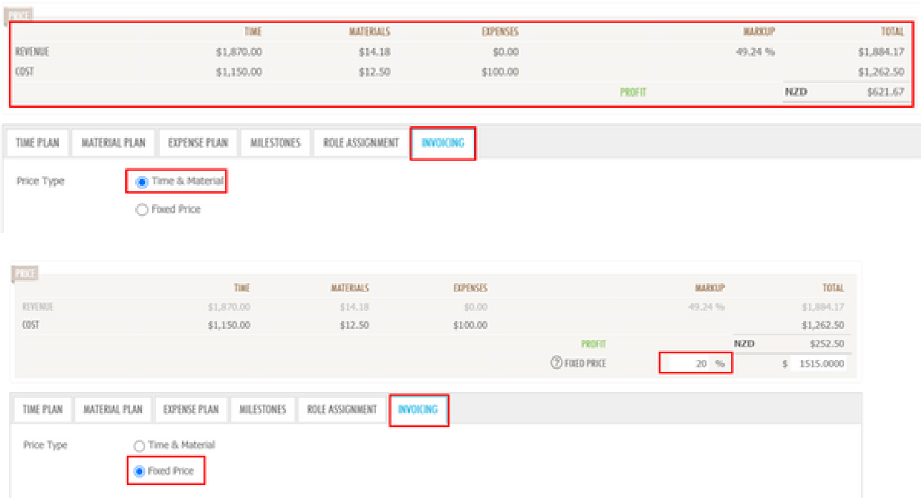
Note: only estimator role will be displayed in this screen.



In the **Invoicing tab** you can select a **Price Type** for this quote.

Time & Material: The revenue and cost total will be calculated based on the value that has been entered.

Fixed Price: Enter a markup percentage or a figure in total.



Select a label as **Quote** or **Estimate** on the quote document. Select the **Sales Tax** type and **Currency** and click **Save.**