



Quote / Costing

The PCB X3 Quote / Costing Module is designed to simplify and streamline the art of costing, to generate professional quotes and to provide a framework to manage volumes of quotes and be able to track their status at any time.

PCB X3 achieves this by way of predefined workflow processes that a Quote follows and by providing a number of tools to assist the user in preparing and managing the Quotes.

The PCB X3 Quote / Costing Module consists of the following tool-set:

- Quote Register
- Quote Details & Quote Line Items
- Quote Acceptance & Job Start
- Job / Project Library
- Quote Rating
- Quote Manager – Completed Quotes
- Quote Manager – Job Classifications

Quote Register

The PCB X3 Quote Register provides easy access to all Quotes across all quote workflow processes.

The quote workflow is defined as follows:

1. **Quote preparation** – the quote is still a work in progress
2. **Quote completed** – the user completed the quote and a client report was sent. The quote is now in a holding pattern awaiting acceptance or rejection
3. **Quote accepted** – the quote was accepted and a job or project can be created

The quote workflow also provides the following additional options:

1. Quote rejected
2. Quotes On-hold
3. Quotes with no further action

PCB X3 displays the number of quotes in each of the workflow stages in a graphical way on the main menu from where the Quote Register can be called to display the desired quotes.

The Quote Register displays the site address and city, the quote description and total quote value and the quote and site ratings.

Key Quote Register features

- Find one or more quotes based on fields and speed buttons shown on the register
- Find one or more quotes using the Advanced Quote Finder
- Search results display a list of quotes including the total number and value of the quotes found
- With the quotes shown in the register, the user has access to:
 1. Quote details
 2. Underlying client request/call docket
 3. Service Job or Project (if quote was accepted)
 4. Client and Site details
 5. Print options
 6. External site folder
 7. Client contacts
 8. All quotes for the underlying site
 9. All quotes for the underlying client
- The register allows creating a follow-up quote based on a previous quote. This option is also available on sales invoices
- Display quotes based on underlying site post-code distribution

Quote Details & Quote Line Items

The Quote Details form consist of seven sections that cater for the following:

1. **Summary** – view major flags, quote description and notes and the financial summary of the quote
2. **Quoted Items** – create quote line items that can be pulled from the inventory or job library. Quote line items generate the actual costing and they can represent costs or composite rates. Insert line item headings, copy or move line items to different positions, select multiple line items to batch update with transaction

categories or rates. Generate a final profit and overhead line item that calculates both based on margins that are system wide or can be changed on the quote. If quoted line items are selected as client report, the system automatically distributes the profit & overhead across all line items and the profit & overhead are not shown on any client reports

3. **Client Items** – for each quoted line item a client item is available that may or may not be used. Once client items are used the system proposes to print the client items report. Client items allow the user to enter any text and any amount provided that the total matches the quoted line items
4. **Category Totals** – the category totals are derived from the categories that must be allocated to line items. Categories represent the activities or services or trades the enterprise engages in. They are user definable
5. **Quote History** – the history consists of snapshots of reports printed until a quote is accepted
6. **Administration** – the admin section allows setting up the week's working days and profit margins and provides a quick quote calculator, allows creating a copy of the quote and others
7. **Quote Variations** – the variation section is available once a quote is accepted. After acceptance, no changes can be made to a quote except via variations. Variations can be printed separately and need approving before the total is posted to the overall financial summary of the quote

Key Quote Detail features

- Quote line items allow calculations using Item, Hrs, Days, Weeks or Months or Calc for square meter, lineal metre, cubic metre and more
- Quote line items can be moved up and down the list to create a logical or sequential order
- Quote line items can be imported from the library
- Client items can be obtained from any previously entered items

- Client items can be generated on the fly from the underlying quoted items
- Easy access to client contacts
- Easy access to external site folder
- Add new user task or view quote related user tasks
- Workflow status is prominently displayed
- An accepted quote's line items can be transferred via purchase orders to the job or project

Key Quote Printing features

- Print internal or external (client) reports
- Print or Email the quote
- Easy access to the external site folder
- Print an Invitation for a Quote or Tender and send it to a Vendor
- Select different terms and conditions from the library (standard terms can be set system wide)
- Send a copy of the quote to someone else
- Select all underlying data records or only some
- Choose from a number of predefined reports
- Attach a contract to the quote
- Attach pictures to the quote

Quote Acceptance & Job Start

The PCB X3 Quote Acceptance & Job Start procedure varies depending whether a Service Job or a Project will be created. Both require the capture of who accepted the quote – ie a client contact, the final contract amount and any margins on variations that can be charged.

For Projects, the following can be predetermined:

- Charge type and starting and ending dates

- Retention amounts, warranty insurance taken out and indemnity / warranty given
- HRs (employed or GST entities) and Vendors nomination
- Cash-flow requirements
- Required Occupational Health and Safety (OHS) documentation

Once this process is completed, the workflow indicator on the quote allows the starting of the job or project.

Job / Project Library

The PCB X3 Job/Project Library allows setting up jobs or projects similar to what is described in the Quote Details. Library Jobs/Projects contain line items that may be derived from the inventory or may be entered free form.

Setting up standard jobs/projects in the library first may save many hours in the long term as they can be easily pulled across to the quote and quickly updated with quantities applicable to the quote at hand.

Transferring data from the library to a quote allows the following options:

1. Transfer all or only some records for a job
2. Transfer only the library job classification

The Jobs/Projects Library is part of the comprehensive PCB X3 Library that is discussed in detail in the PCB X3 Library Overview.

Quote Rating

The PCB X3 Quote Rating classification is part of the PCB X3 Rating Options for rating clients, sites and quotes.

Rating classifications are user definable. The default quote rating that is applied to all new quotes can be set on the entity set-up. Changing the quote rating occurs on the Quote Detail's Summary section.

Quote Manager – Completed Quotes

The PCB X3 Quote Manager for Completed Quotes provides a management tool to view and action on completed quotes.

Key features of the Quote Manager for Completed Quotes

- View completed quotes by month/year or client or the person that created the quote
- Re-send a quote (print or Email) and keep a history of any client interactions pertaining to the quote
- View and access all relevant and related data associated with the quote including external site folder, client and client contacts, site and site contacts and more
- Add new user task or view quote related user tasks

Quote Manager – Job Classifications

The PCB X3 Quote Manager for Job Classifications provides the function of batch-updating quotes with a job/project classification.

Allocating job classifications to quotes allows the grouping of and reporting on job classifications in terms of total value and number of quotes. This in turn can then be compared to actual jobs and projects completed that may lead to the specialisation of certain jobs versus others.

Key features of the Quote Manager for Job Classifications

- View all quotes without classification
- View job classifications with quotes allocated
- Easy access to the underlying quote, call request/docket and or job/project
- Easy access to the quote report menu for job classifications
- Single or batch updating process