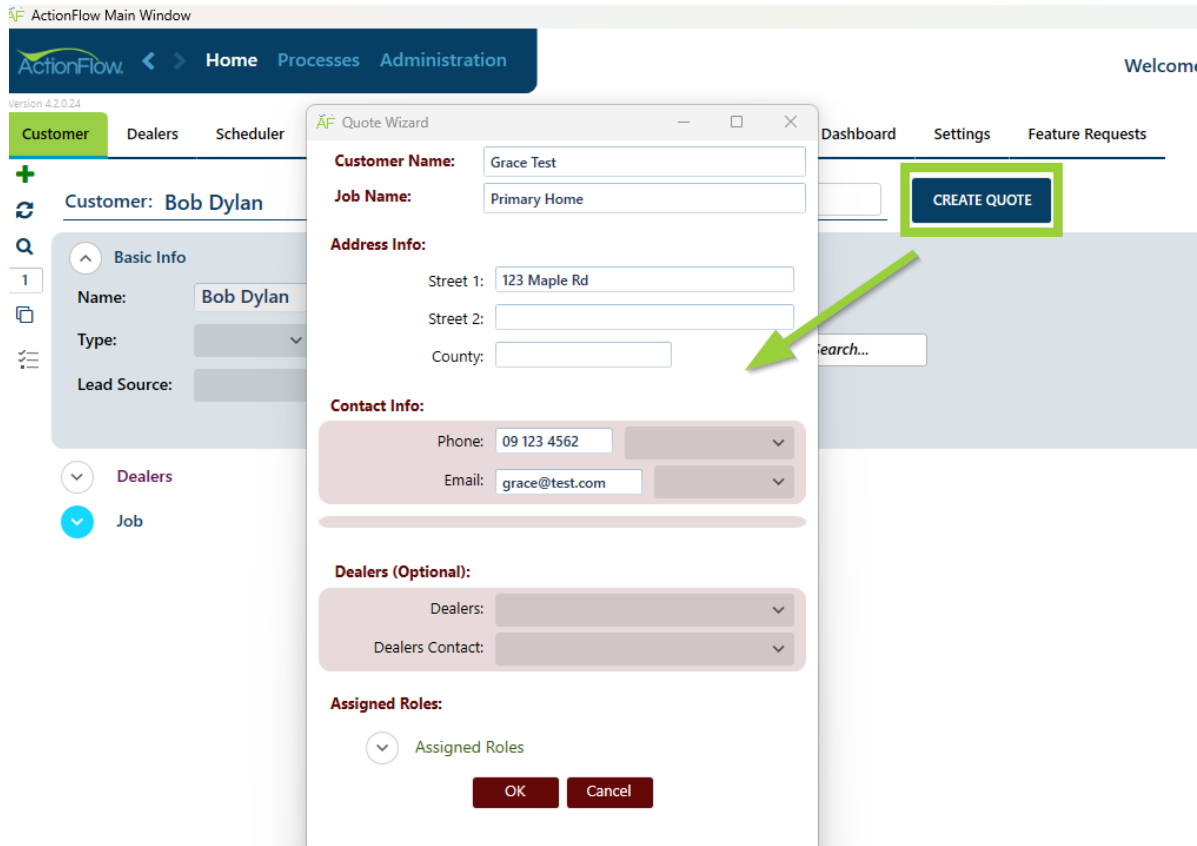


Step 1- Create a Customer

Create a customer using the quote Wizard or by manually entering a customer

Option 1: Quote Wizard-

1. Click on the Quote Wizard icon to the left side of the Home Tab Screen. You can enter in the client information here and click okay. This will create a new quote and open the Area Module, where you can enter your quote.



The screenshot shows the ActionFlow software interface. The main window is titled 'ActionFlow Main Window' and has a navigation bar with 'Home', 'Processes', and 'Administration'. The 'Customer' module is active, showing a customer profile for 'Bob Dylan'. Overlaid on this is the 'Quote Wizard' dialog box. The wizard contains the following fields and sections:

- Customer Name:** Grace Test
- Job Name:** Primary Home
- Address Info:**
 - Street 1: 123 Maple Rd
 - Street 2: (empty)
 - County: (empty)
- Contact Info:**
 - Phone: 09 123 4562
 - Email: grace@test.com
- Dealers (Optional):**
 - Dealers: (empty)
 - Dealers Contact: (empty)
- Assigned Roles:** Assigned Roles (with a dropdown arrow)

At the bottom of the wizard are 'OK' and 'Cancel' buttons. In the background, the 'CREATE QUOTE' button is highlighted with a green box, and a green arrow points to it from the 'Street 2' field.

Option 2- Manually enter a new customer

1. Click on the green plus sign on the left side of the Home Tab Screen.

Version 4.2.0.7

Customer Account Scheduler Inventory Vendor Fabrication Fab Scheduler GridView Reports Dashboard Settings

Select Customer → Search... CREATE QUOTE

Name: [Text Field] Measure Square

Status: [Dropdown]

Type: [Dropdown]

Process: [Dropdown]

Lead Source: [Dropdown]

Contact Information

Persons Person Person Search...

Assigned Roles

Customer Details

Actions

Account

Job

Enter the Customer Name and update the customer information. Click Save. (If it is greyed out, ActionFlow autosaved your data.)

Customer: Harry Kane Search... CREATE QUOTE

Customer View Job View #

Basic Info

Name: Harry Kane

Type: [Dropdown]

Lead Source: [Dropdown]

Contact Information

Address

10 Russell St

London

WC2B 5HZ

Phone

+44 20 7636 0935

Email

test@gmail.com

Persons Person Person Search...

Assigned Roles

Dealers

Job

2. Create a Job by clicking the green plus sign on the left side of the Home Tab.

Customer View

Customer: Harry Kane

Job List

#	Status	Job Name	M2	Revenue	Payments	AmountDue	CreatedDate	Notes	Estimate Notes
14	Created	Primary Home	0.0000	NotLoaded	0.00	0.00	10/08/2023		

Count: 1

Job: #14 Primary Home

Job Details:

- Name: Primary Home
- Status: Created
- Type: [Dropdown]
- Process: Standard
- Contact Information: [Dropdown]
- Persons: [Dropdown]

Job View

Customer: Harry Kane

Job List

#	Status	Job Name	M2	Revenue	Payments	AmountDue	CreatedDate	Notes	Estimate Notes
14	Created	Primary Home	0.0000	NotLoaded	0.00	0.00	10/08/2023		

Count: 1

Job: #14 Primary Home

Job Details:

- Name: Primary Home
- Status: Created
- Type: [Dropdown]
- Process: Standard
- Contact Information: [Dropdown]
- Persons: [Dropdown]

3. Create an Area in that job by clicking on the green plus sign in the area section.

Customer: Harry Kane

Job: #14 Primary Home

#	Status	Job Name	M2	Revenue	Payments	AmountDue	CreatedDate	Notes	Estimate Notes
14	Created	Primary Home	0.0000	0.00	0.00	0.00	10/08/2023		

Count: 1

Area List:

Area#	Rv	Name	Qnt	Status	CalcType	Material	Color	Revenue	M2	RmkSqFt	Edge(s)	LnM	Fab Notes
1	0	13 0 Kitchen	1	Created				£0	0	0	0		

Process: Standard

Contact Information

Persons

Assigned Roles

CC Payment

ACH Payment

\$ Debit Payment

Step 2- Create a Quote

The process for creating a quote can be described in these steps:

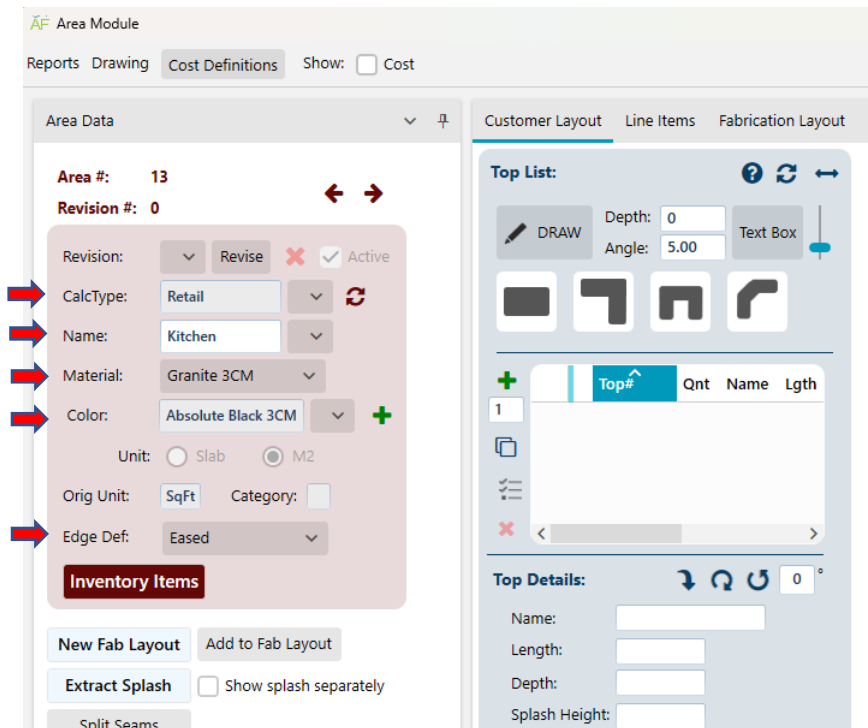
- 1) Add Required Area Data
- 2) Enter data for calculating square footage
- 3) Enter data for edges
- 4) Add additional options to the top
- 5) Add additional line items for quote
- 6) (If applicable) Enter data for calculating slab prices

The steps above are described in more detail below:

- 1) **Add Required Area Data** (You can select a name for this Area in the drop down or you can highlight the field and type in your own custom name)

The items below are required for all quotes:

- Select a CalcType, which sets the prices that will apply for this quote.
- Select the Material
- Select the Color
- Select the Edge Default



Area Module

Reports Drawing Cost Definitions Show: Cost

Area Data

Area #: 13
Revision #: 0

Revision: Active

CalcType: Retail

Name: Kitchen

Material: Granite 3CM

Color: Absolute Black 3CM

Unit: Slab M2

Orig Unit: SqFt Category:

Edge Def: Eased

Inventory Items

New Fab Layout Add to Fab Layout

Extract Splash Show splash separately

Split Seams

Customer Layout Line Items Fabrication Layout

Top List:

DRAW Depth: 0 Angle: 5.00 Text Box

Top#	Qnt	Name	Lgth
1			

Top Details:

Name:

Length:

Depth:

Splash Height:

2) Enter data for calculating square footage

You have three options for entering the information that is used for calculating square footage:

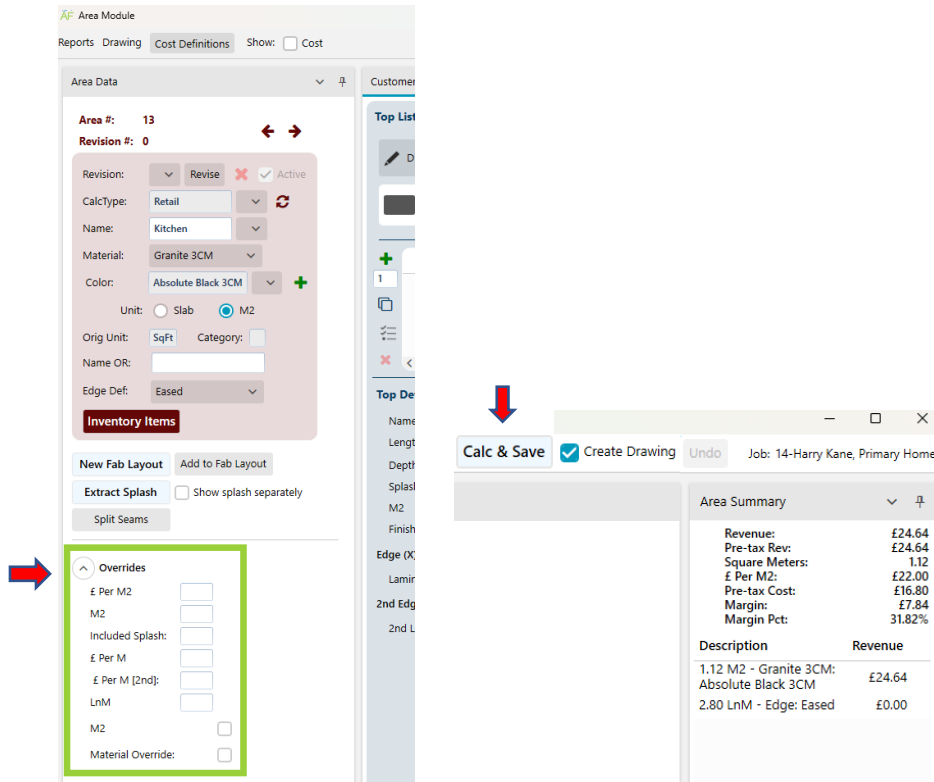
- Option 1: Override Section
- Option 2: Create rectangular tops
- Option 3: Create tops using the Drawing feature

The three options are described in detail below:

Option 1: Override Section

(The drawing is not required)

1. Expand the Override Section in the area data
2. Enter applicable values in the section and click the Calc and Save button on the right side of the screen to calculate override data that was entered.



The screenshot shows the 'Area Data' form in the 'Area Module' with the following details:

- Area #: 13
- Revision #: 0
- Revision: [Dropdown] [Revise] [Active]
- CalcType: Retail
- Name: Kitchen
- Material: Granite 3CM
- Color: Absolute Black 3CM
- Unit: Slab M2
- Orig Unit: SqFt Category:
- Name OR: [Text Box]
- Edge Def: Eased
- Buttons: Inventory Items, New Fab Layout, Add to Fab Layout, Extract Splash, Show splash separately, Split Seams

The 'Overrides' section is expanded and highlighted with a green box, showing input fields for:

- £ Per M2
- M2
- Included Splash:
- £ Per M
- £ Per M [2nd]:
- LnM
- M2
- Material Override:

On the right, the 'Area Summary' window is open, displaying the following data:

Area Summary	
Revenue:	£24.64
Pre-tax Rev:	£24.64
Square Meters:	1.12
£ Per M2:	£22.00
Pre-tax Cost:	£16.80
Margin:	£7.84
Margin Pct:	31.82%
Description Revenue	
1.12 M2 - Granite 3CM:	£24.64
Absolute Black 3CM	
2.80 LnM - Edge: Eased	£0.00

Option 2: Create tops with predefined shapes.

1. On the Customer Layout Section of the quote, use the predefined shapes button to create the top. Change the dimensions of the top by clicking the numbers. The top length and depth will also be displayed in Top Details.
2. Once a top is created, you can hover over the dimension to click and highlight the field. Once the box is selected, you can update/change the measurement. You can also hit the tab key to tab over to the other dimensions, so that you can modify them as well.

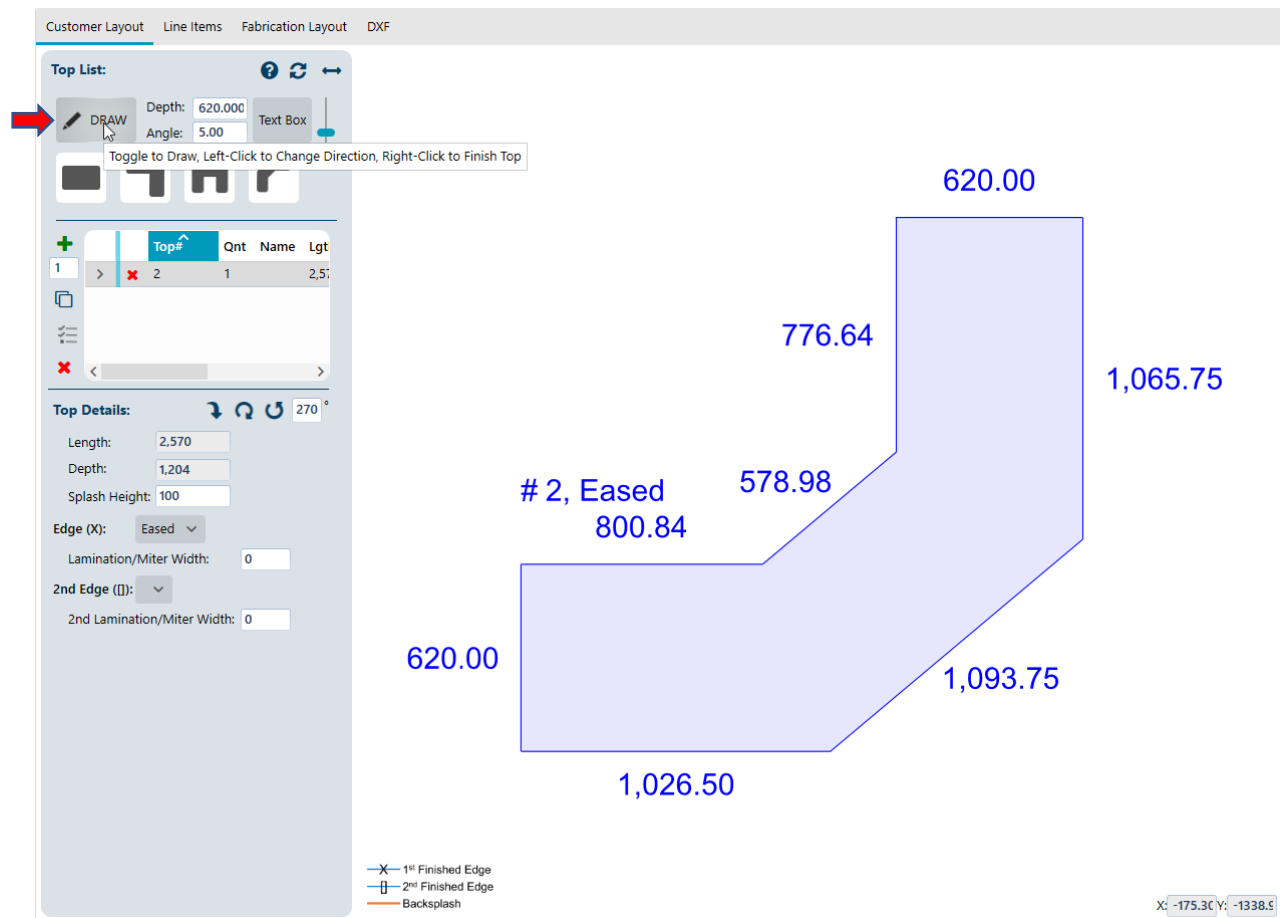
The screenshot displays the software interface for creating a top. On the left, the 'Top List' panel shows a table with one entry: a top with quantity 1 and length 1,600. Below this, the 'Top Details' panel shows the following fields:

- Length: 1,600
- Depth: 620
- Splash Height: 100
- Edge (X): Eased
- Lamination/Miter Width: 0
- 2nd Edge (I):
- 2nd Lamination/Miter Width: 0

On the right, a diagram of the top is shown as a light blue rectangle. The dimensions are labeled: a length of 1,600.00 (with '1600' highlighted in yellow), and a depth of 600.00. The text '# 1, Eased' is positioned above the rectangle. A legend at the bottom left indicates symbols for '1st Finished Edge', '2nd Finished Edge', and 'Backsplash'. The bottom right corner shows coordinates: X: 712.40, Y: -712.52.

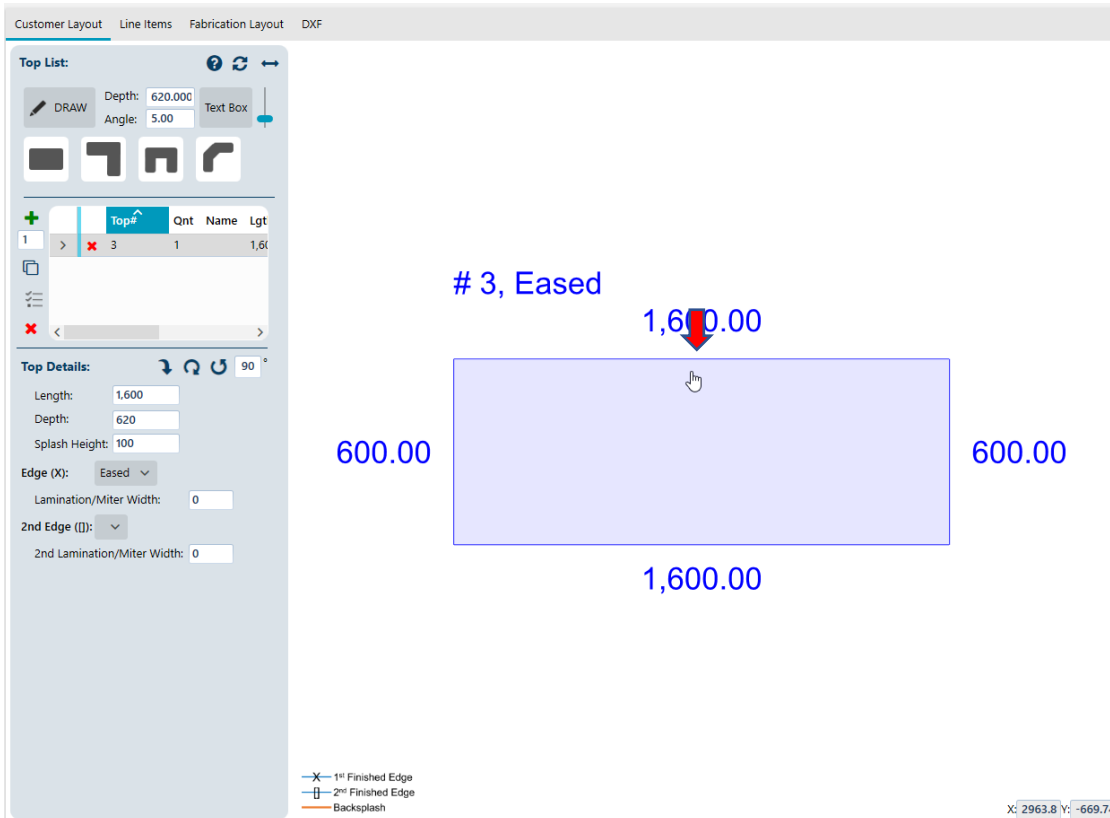
Option 3: Create tops using the Drawing feature

1. If you have a shape that is not predefined (a batwing with non-45° angles), use the “Draw” button.
2. Click on the open drawing area to begin drawing a top. One thing to emphasize is that you should release the mouse after your initial click. This is not a dragging action, but a click and release action. This is important, because if you want to change direction, you will click again.
 - Click the round Draw button
 - Click on the drawing page to get a starting point, release click, do not hold down mouse button
 - Move your mouse to start drawing your tops
 - When you are ready to make a turn/angle/Etc. Click your mouse to mark a stopping point and release. Make your turn/angle as you start to draw again. When you are ready to make a turn/angle/Etc. Click your mouse to mark a stopping point and release. Make your turn/angle as you start to draw again. Continue until tops are drawn.
 - Right click on your mouse to save the top and complete.



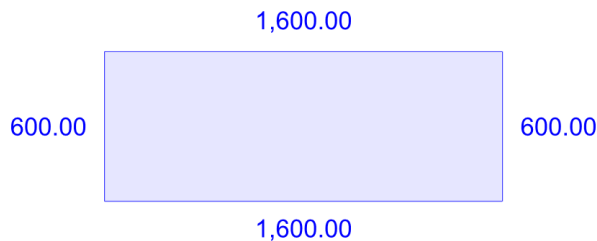
3) Enter data for edges

There are three options for each edge on a top: Unfinished, Finished and Backsplash. To change the edge on a top, you must first select the top by clicking on it (it will be highlighted in blue to indicate it is selected). Hover over the top and move your mouse close to the edge of the top and notice the mouse turns to a hand.

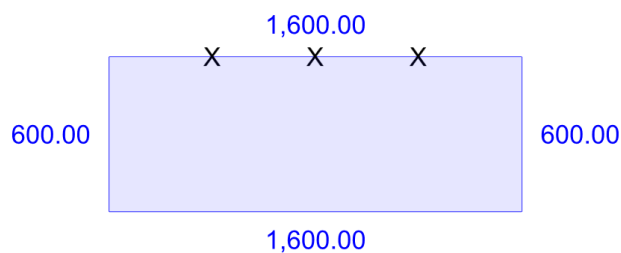


As you continue to click on the top, it will cycle through the Unfinished, Finished and Backsplash options:

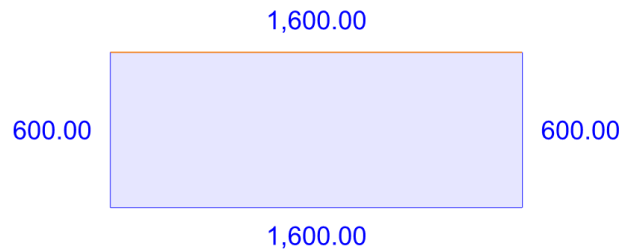
Option One- Unfinished Edge



Option Two- Finished Edge

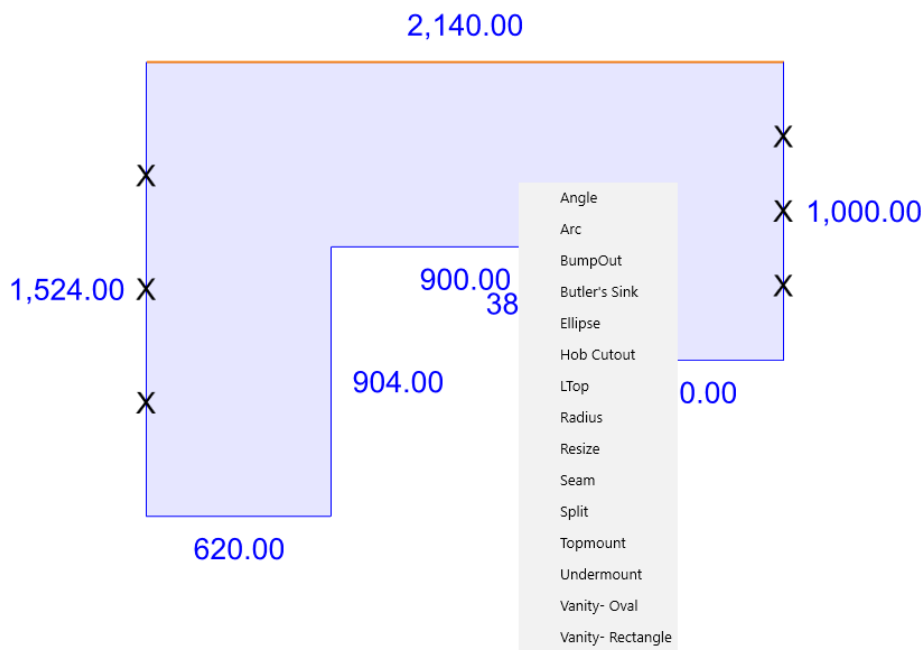


Option Three- Backsplash



4) Add additional options to the top

You can right click on a top to add multiple options to that specific top.



5) Add additional line items for quote

There are some line items that can't go on the drawing, for example a tearout. Those items are adding on the Line Items tab in the Area Module. To add one of those line items, follow these steps:

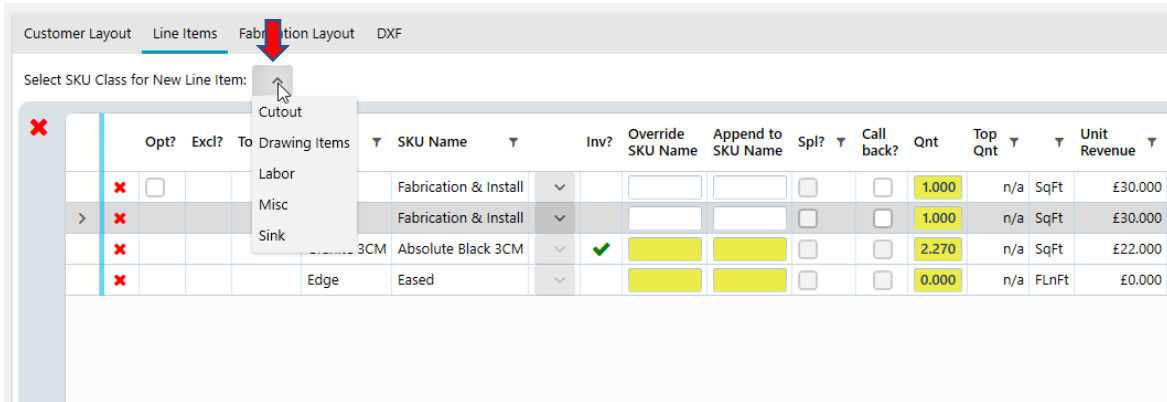
- Go to the Line Items tab on the Area Module

The screenshot shows the software interface with the 'Line Items' tab selected. A red arrow points to the 'Line Items' tab. The interface includes a sidebar with 'Area Data' (Area #: 13, Revision #: 0, Name: Kitchen, Material: Granite 3CM, Color: Absolute Black 3CM) and a main table for line items. The table has columns for Opt?, Excl?, Top#, Class, SKU Name, Inv?, Override SKU Name, Append to SKU Name, Spl?, Call back?, Qty, Top Qty, Unit, Revenue, Override Unit Revenue, Override Percentage, and Exter Reve. The table contains four rows of data:

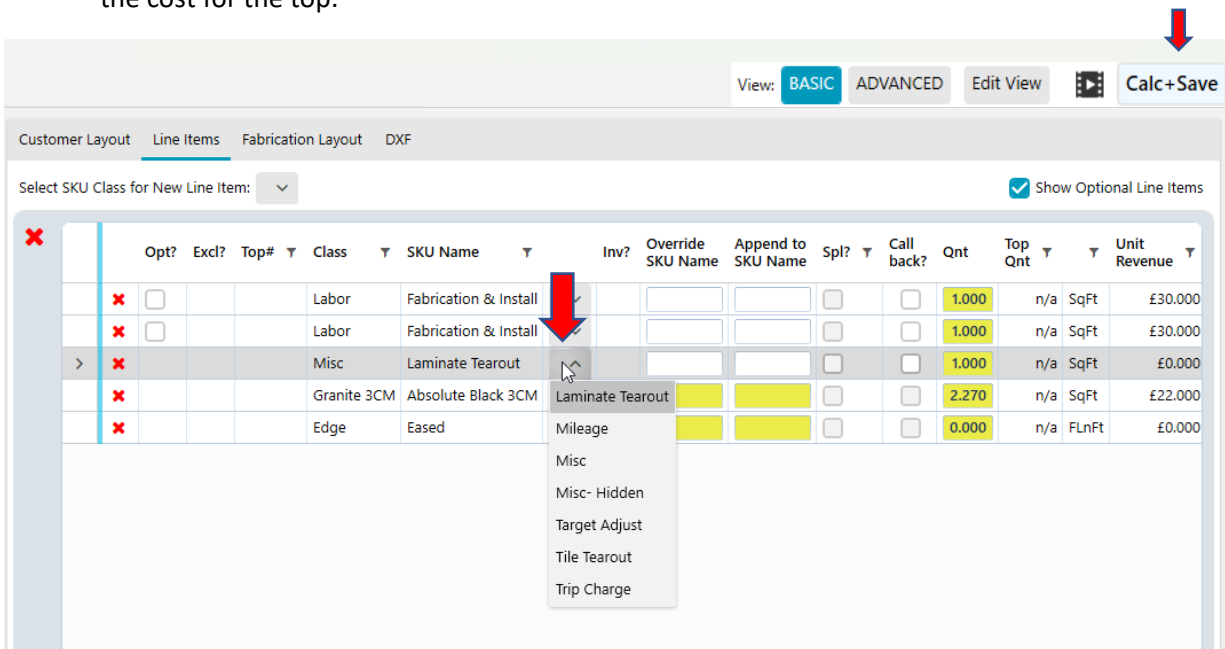
Opt?	Excl?	Top#	Class	SKU Name	Inv?	Override SKU Name	Append to SKU Name	Spl?	Call back?	Qty	Top Qty	Unit	Revenue	Override Unit Revenue	Override Percentage	Exter Reve
			Labor	Fabrication & Install						1.000	n/a	SqFt	£30.000			
			Labor							1.000	n/a	SqFt	£0.000			
			Granite 3CM	Absolute Black 3CM						2.270	n/a	SqFt	£22.000			
			Edge	Eased						0.000	n/a	FLNFT	£0.000			

On the right side, there is an 'Area Summary' panel showing Revenue: £49.94, Pre-tax Rev: £49.94, Square Meters: 2.27, £ Per M2: £22.00, Pre-tax Cost: £14.05, Margin: £15.89, and Margin Pct: 31.82%.

- Each Line Item has a Class and a SKU. First, select the Class in the drop down, which will add the Line Item to the list.



- From the drop down, select the specific SKU within the class. Click Calc + Save to calculate the cost for the top.



6) (If applicable) Enter data for calculating slab prices

1. You can do a calculation by slab. This can be done by selecting a color that is defined (in the Administration settings) to be priced per slab or by overriding the unit if you have permission. The slab revenue value can be pre-entered, but you can also change them at the time you do the calculation.
2. Click on the Open Inventory Items button under the Area Data field to open the Slab Details Grid.

The screenshot displays the ActionFlow software interface. On the left, the 'Area Data' panel is visible, showing fields for Area # (13), Revision # (0), Name (Kitchen), Material (Granite 3CM), Color (Absolute Black 3CM), and Unit (M2). A red arrow points to the 'Inventory Items' button. The 'Top List' grid shows a table with columns Top#, Qnt, Name, and Lgt. The 'Top Details' panel shows dimensions: Length: 2,140, Depth: 1,524, and Splash Height: 100. To the right, a diagram of a blue L-shaped slab is shown with dimensions 2,140 and 1,524.00, and a label '# 4, Eased, Hght'.

- Click on the Green Plus sign under the Slab Details area to add slab information. You can click on the plus sign multiple times to add multiple slabs.

- If the slab information is pre-entered in, you can change the information by clicking on the fields. Enter in your Length, Depth and M2 Price. Click Calc and Save to create quote.

Step 3 - Print Out or Email Quote

Once the quote has been calculated, you will probably want to print out or email a copy of the quote. To do so, click on the Customer Layout tab and then go to the left side of the Area Module to locate the Reports. This is where you can locate your Estimate to print, save or email to the client directly.

The screenshot shows the ActionFlow software interface. A red arrow points to the 'Area Module' window. The 'Reports' menu is open, and 'Estimate' is highlighted. The main window displays the 'Customer Layout' tab, showing a technical drawing of a slab with dimensions and a legend. The 'Top List' table is as follows:

Top#	Qnt	Name	Lgt
1	4		2,140

The 'Top Details' section shows the following values:

- Length: 2,140
- Depth: 1,524
- Splash Height: 100
- Edge (X): Eased
- Lamination/Miter Width: 0
- 2nd Edge (L):
- 2nd Lamination/Miter Width: 0

The 'Area Summary' table on the right shows the following revenue breakdown:

Description	Revenue
Revenue	£49.94
Pre-tax Rev:	£49.94
Square Meters:	2.27
£ Per M2:	£22.00
Pre-tax Cost:	£34.05
Margin:	£15.89
Margin Pct:	31.82%


The 'Inventory Items' table at the bottom shows the following data:

Item#	Custom Desc.	NSQnt	Vendor	Length	Depth	M2	Slab £ Per M2	Cost	Revenue	Location	Multitem#	UsedLength	Used
1						0.00	£15.00	£0.00	£500.00				


You can email, print, export or save your quote to the job files by clicking on the icons below:

- Print Icon- Print a hard copy of the Estimate
- Email Text- Email quote from within ActionFlow to your client
- Document Icon- Save Estimate to the job files
- Adobe – Open quote in Adobe Reader
- Save Icon- Export Estimate as a PDF, CSV File, EMF Description, Excel, Rich Text Format, TIFF file, Web Archive


AF Area Reports



1 of 1



Estimate



ABC
KITCHEN & BATH


Date: 10/08/2023

Customer: Harry Kane

Job Site: 10 Russell St
London
WC2B 5HZ
+44 20 7636 0935
test@gmail.com

Job: #14-Primary Home

Kitchen (#13,0)	£191.06
<i>Includes template and installation of countertops</i> Granite 3CM: Absolute Black 3CM Edge: Eased Labor: Fabrication & Install Misc: Laminate Tearout	
Without Backsplash: <input type="text" value="£173.84"/>	
Alternative Materials: <input type="text"/>	
Price Difference for Alternative Edges:	

Kitchen (#13,0)	
<div style="color: blue; font-weight: bold; margin-bottom: 10px;"># 4, Eased, Hght:100.00</div> <div style="color: blue; font-weight: bold; margin-bottom: 10px;">2,140.00</div> 	

Navigation bar with icons for back, forward, search, and other functions. Includes a page indicator '1 of 1' and an 'Email' button.

Estimate



ABC
KITCHEN & BATH

Customer: Harry Kane

Job:

Job Site: 10 Russell St
London
WC2B 5HZ
+44 20 7636 0935
test@gmail.com

- Acrobat (PDF) file
- CSV (comma delimited)
- EMF Description
- Excel 97-2003
- Rich Text Format
- TIFF file
- Web Archive

10/08/2023

Kitchen (#13,0)	£191.06
<i>Includes template and installation of countertops</i> Granite 3CM: Absolute Black 3CM Edge: Eased Labor: Fabrication & Install Misc: Laminate Tearout	
Without Backsplash:	<input type="text" value="£173.84"/>
Alternative Materials:	<input type="text"/>