

# 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.

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Version 4. Cust	omer Account	Scheduler	ĂF Quote Wizard	-		Reports	Dashboard	Settings	Feature Reque
+ 2	Customer: #2	80 ABC Quo	lah Nama	Grace Test Primary Home		c	REATE QUOTE	1	
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## **Option 2- Manually enter a new customer**

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

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

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9	✓ Search CREATE QUOTE	CUSTOMER VIEW
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2. Create a Job by clicking the green plus sign on the left side of the Home Tab.

### **Customer View**

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



# 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:

- 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

ĂF Area Module Reports Drawing Cost Definitions Show: Cost	TS
Area Data v 4	Customer Layout Line Items Fabrication Layout
Area #:       2169         Revision #:       0         Revision:       ✓ Revise         CalcType:       Retail         CalcType:       Retail         Material:       Granite 3cm         Color:       Absolute Black 3CM         Orig Unit:       SqFt         Category:       A         Name OR:       ✓	Top List:       ②       ♡       >         ✓       DRAW       Depth:       25.500       Text Box         ▲       Angle:       5.00       Text Box       ↓         +       Top#       Qnt       Name       Lgt         1       □       □       □       □       □       □         *=          □       □       □
Edge Def: Eased  Inventory Items New Fab Layout Add to Fab Layout Extract Splash Show splash separately Split Seams Overrides	Top Details:   Length:   Depth:   Splash Height:   Edge (X):   Lamination/Miter Width:   2nd Edge ([]):   2nd Lamination/Miter Width:



#### 2) Enter data for calculating square footage

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

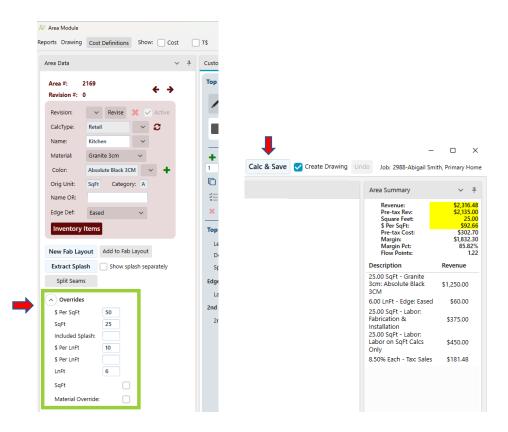
- Option 1: Override Section
- Option 2: Create rectangular tops
- Option 3: Create tops using the Drawing feature

The three options are described in detail below:

#### **Option 1: Override Section**

(The drawing is not required)

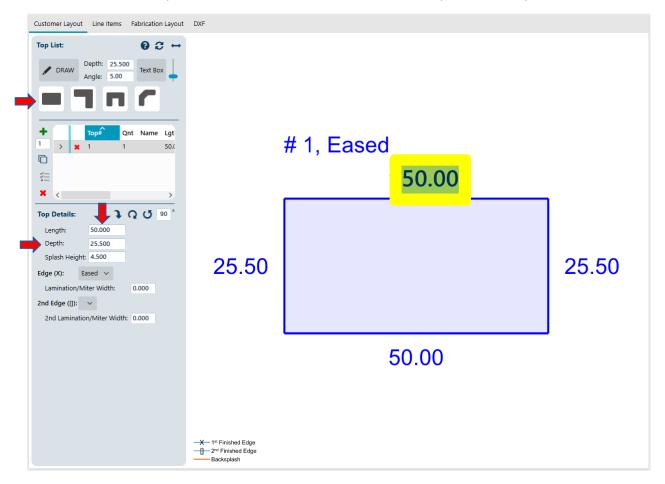
- 1. Expand the Override Section in the area data
- 2. Enter applicable values in the section and click the Calc and Save button on the right side of the screen to calculate override data that was entered.





#### Option 2: Create tops with predefined shapes.

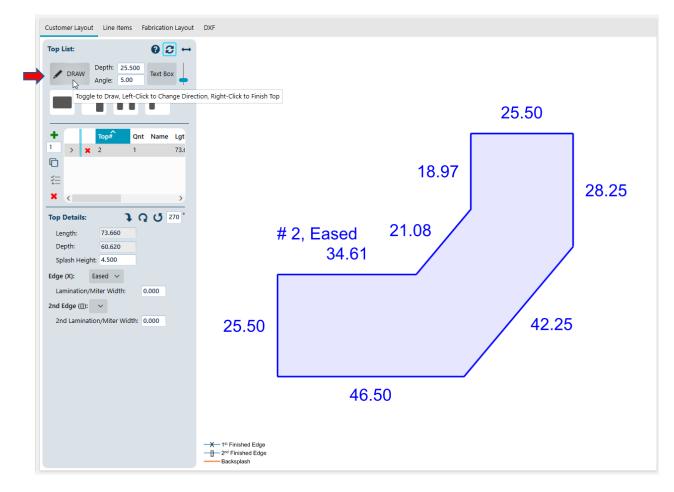
- 1. On the Customer Layout Section of the quote, use the predefined shapes button to create the top. Change the dimensions of the top by clicking the numbers. The top length and depth will also be displayed in Top Details.
- 2. Once a top is created, you can hover over the dimension to click and highlight 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.





### 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.



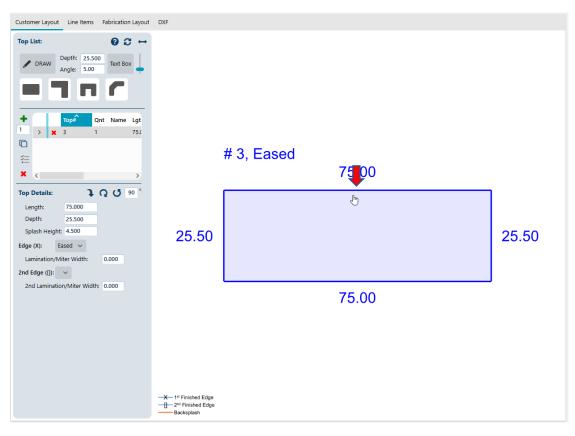


- 2. Click on the open drawing area to begin drawing a top. One thing to emphasize is that you should release the mouse after your initial click. This is not a dragging action, but a click and release action. This is important, because if you want to change direction, you will click again.
  - Click 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.



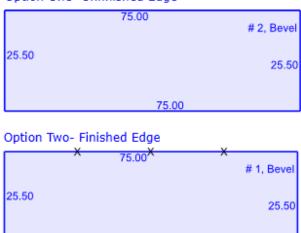
#### 3) Enter data for edges

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



75.00

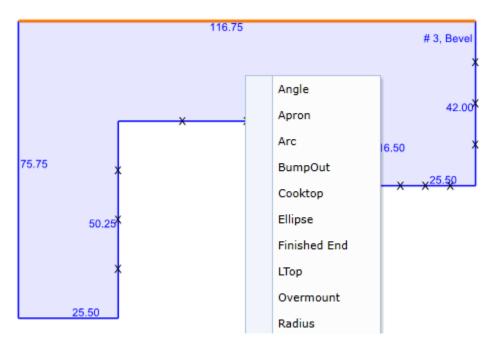


### Option Three- Backsplash

	75.00	# 2, Bevel
25.50		25.50
	75.00	

### 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:

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rea #:	2169 ← →	Sel	lect SKU (	class fo	New	Line Item:	~ L	ineal Materi	al						Show	w Optional L	ine Items	Revenue: Pre-tax Rev: Square Feet:	\$2,38 \$2,38 2,38
evision #:	0 Revise X 🗸 Active	*	•		Opt?	Excl? To	o# ▼ (	Class 🔻	SKU Name T			Override SKU Name	Append to SKU Name	Spl? 🔻	Qnt	Top Qnt ▼	T UI Ré	S Per SqFt: Pre-tax Cost: Margin: Margin Pct: Flow Points:	\$9 \$2,2 96
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• Go to the Line Items tab on the Area Module



• 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.

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			Opt?	Excl?		Brackets Columns	SKU Name	Ţ		Inv?	Override SKU Name	Append to SKU Name	Spl? 🔻	Qnt	Top Qnt ▼	Ţ
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• From the drop down, select the specific SKU within the class. Click Calc + Save to calculate the cost for the top.

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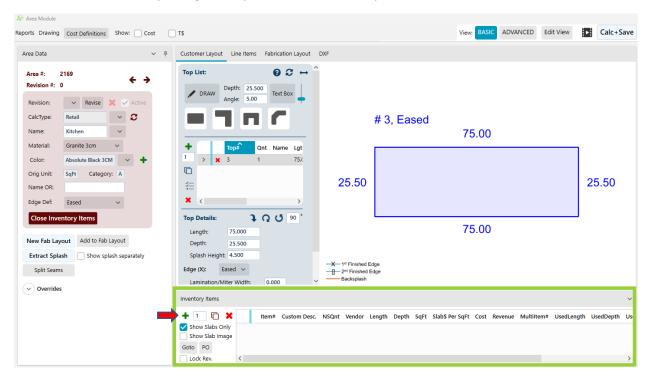
### 6) (If applicable) Enter data for calculating slab prices

- 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.

Area Data	✓ ₽ Customer Layout Line Items Fabrication Layout	DXF	_
Area Jata  Area #: 2169  Revision #: 0  Revise # Active CalcType: Retail  Area #: 2169  Revise # Active CalcType: Retail  Active CalcType: Retail  Revise # Active CalcType: Retail  Color: Absolute Black 3CM  Attichen  Attichen	Customer Layout Line Items Pabrication Layout Top List:		# 3, Ease
Split Seams	Edge (X): Eased V Lamination/Miter Width: 0.000 2nd Edge ([]): V 2nd Lamination/Miter Width: 0.000	-X − 1 <sup>ss</sup> Finished Edge -B − 2 <sup>nd</sup> Finished Edge -B acksplash	



3. 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.



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

Inventory Items															`
+1 🗅 🗙			Item#	Custom Desc.	NSQnt	Vendor	Length	Depth	SqFt	Slab\$ Per SqFt	Cost	Revenue	MultiItem#	UsedLength	ι
Show Slabs Only Show Slab Image	-	×	~			Granite 4 U 🗸 🗸	120.00	55.00	45.83	\$7.55	\$346.02	\$432.52	~		



# 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 the 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.

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Area Module		- O X
Reports Drawing Cost Definitions Show: Cost	T\$ View: BASIC ADVANCED Edit View	Calc & Save 🗸 Create Drawing Undo Job: 1514-Grace Watt, Primary Home
Include Current Area Only		
Commercial Estimate	Customer Layout Line Items Fabrication Layout DXF	Area Summary 🗸 🕂
Commercial Estimate (Copy)	Top List: Ø ♂ ↔ ^	Revenue: \$2,385.00 Pre-tax Rev: \$2,385.00
Commercial Invoice	Depth: 25.500	Square Feet: 25.00 \$ Per SqFt: \$95.40
Commercial Line Items	PRAW Angle: 5.00 Text Box	Pre-tax Cost: \$93.40 Margin: \$2,291.60
Customer and Fab Layout		Margin Pct: 96.08% Flow Points: 1.53
Customer Reference Form	# 3, Eased	Description Revenue
Deposit Request	75.00	25.00 SqFt - Granite 3cm: Absolute Black \$1,250.00
Dxf Drawing	+ Top# Ont Name Lgt	3CM
Estimate	1 > x 3 1 75.	6.00 LnFt - Edge: Eased \$60.00 25.00 SqFt - Labor:
Estimate (ABC Kitchen & Bath)		Fabrication & \$375.00
Estimate (ABC Kitchen & Bath) Retreat	≇ 25.50	25.50 Installation 25.00 SqFt - Labor:
Estimate (Cabinets)		Labor on SqFt Calcs \$450.00 Only
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Estimate (No Drawing)	Splash Height: 4.500	
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Estimate (No Units, Alts, or Drawing) MultiFab	Inventory Items	~
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Estimate (Uploaded Drawing)	Show Slab Image	
Estimate- Breakdown	Goto PO	
Estimate- Breakdown (No Drawing)	Lock Rev.	>



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

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Job Site:	Test Address 123 Test St. Louis, MO 123456 123-456-7890 grace@actionflow.net				
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Kitchen (#49	60,0)				

#3, Eased



AF Area Reports
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