V6.09 Training Manual

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Quoting

Find the freedom to focus on what matters with Nimbus

Contents

Document Information

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Overview

Quoting or Estimating is the process of working out what a Job, Service, or Goods will cost a Customer. In Nimbus, quoting templates are used to generate quotations (quotes). Quoted transactions are entered and saved as Job transactions, and can be compared with costed and invoiced Job transactions. Totals are displayed on the quote. Quoted totals are included on the Job Cost Report, and can also be viewed in other Job transaction reports.

Quoting mechanisms are often unique to the organisation using them. So is the range of reporting. Nimbus provides a very good quoting and report system off the shelf; more importantly however, it provides the tools to help refine your own business practice. Quoting is so varied and such a core part of a business's private intellectual property that Nimbus can only provide standard quoting templates to get you started. The templates can then be customised according to business needs. The standard quoting templates are:

Cost Plus	A template that takes the latest cost, adds a stock mark-up, and then adds an overall mark-up. The mark-up can be manipulated.
Quoting	A template that uses schedules. Takes the cost and adds a mark-up. The mark-up can be manipulated. If the quote is accepted, this template can be used for quote spreading, i.e. each schedule is assigned to its own Job.
Quote Spread	Do not use this template when preparing new quotes. It exists only to aid in the viewing of quotes that have been spread for Projects.
Sales Order	A template that is used for ordering pre-sold goods currently not in stock. Also used to issue stock when it arrives.

The quoting process involves:

- Creating a Job to hold the quote.

- Entering the quote details using the quoting template.

- Analysing the financial results and modifying the quote to make enough profit yet still remain competitive.

- Saving and printing the quote.

- Keeping the quote status up to date, i.e. telling the system what stage the Quote is up to.

A full list of all of the quote status types in the demonstration database are:

QR	Quote Request	Used when a quote has been requested by a client. Also used while the quote is being prepared.
QS	Quote Sent to Client	Used to indicate the quote has been completed and sent to the client. Also used while awaiting a response from the client.
QA	Quote Accepted by Client	Used to indicate that the quote has been accepted by the client but a Job has not yet been allocated. Notifies the Job issuer to move the Job along.
XQ	Quote Lost	Used to close the Job that is holding a quote when that quote is rejected by the client. Useful for statistical analysis.
XQA	Alternate Quote Used	Used to close the Job that is holding a quote. This status is different from XQ in that several quotes were prepared but only one was accepted. XQA means a quote was accepted but not the quote held in this Job, therefore this Job is closed.

Quoting Process

The key Nimbus routines for the quoting process are:

STEP 1: Find out what information exists in the system already.
STEP 2: Create a Job to hold the quote details.
STEP 3: Enter the quote details and save the Quote.
STEP 4: Analyse the financial results of your Quote and modify if required.
STEP 5: Print the Quote and send it to the client.
STEP 6: Change the quote status to QS.

What happens next is determined by whether the quote is accepted or not. When a quote is rejected the Job is closed; status is changed to XQ (quote lost) or XQA (alternate quote used). When a quote is accepted the status is changed to QA (quote accepted), JL (Job logged), JA (Job allocated) or JP (progress invoice).

Preparation Work

In Nimbus, if a Quote needs to be prepared then a Job will need to hold that Quote. However, before a Job is created, users must check the system for available information. A Prospect Job may already exist and if it does, the Prospect Job can be used to hold the Quote. If a Prospect Job does not exist, a new Job will need to be created. But all Jobs must be linked to a Debtor Account, so if a Debtor Account does not exist, this will need to be created before a Job can be logged. All of these prerequisites mean that there is preparation work to do before users can begin preparing the Quote. The process is illustrated below.
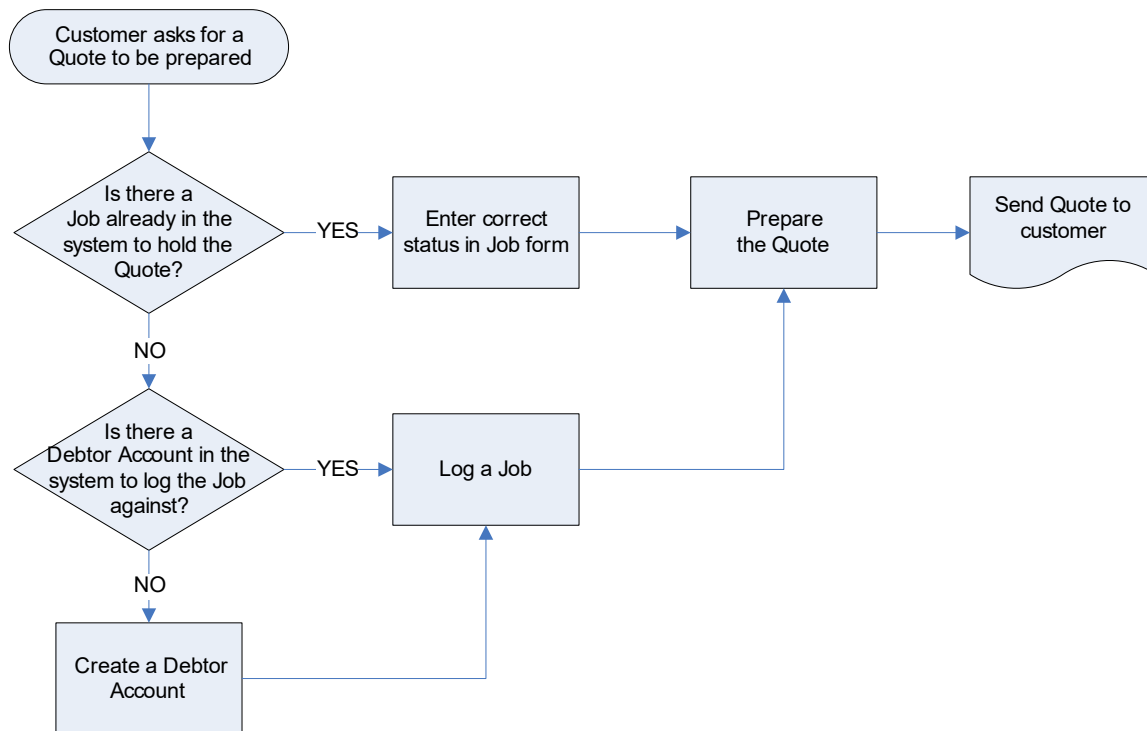
To check whether a Debtor Account exists in the Nimbus database or not:

1. From the **JobFlow** menu, click on the **Log Jobs** menu item.

2. Use the filters to search for the Contact, i.e. the organisation that may or may not have a Debtor Account set up in your Nimbus database. Try several ways of filtering, e.g. use the **City** filter in case the organisation has been entered under a different name.

3. If the search shows that contact details have been set up for this organisation and:

    a. If a shortname appears in the **Client** column and if the words 'New Job' appears

    in the New Job column, a Debtor Account has been set up for this organisation. This means that you can proceed with creating a new Job for this organisation, by clicking on the 'New Job' link.

    b. If a blank entry appears in the **Client** column and if 'New' is displayed in the

    Edit Debtor column, a Debtor Account has NOT been set up for this organisation. This means that a Debtor Account will need to be set up before you can proceed with logging a new Job for this customer. Debtor Accounts can only be set up by users with the access rights. Ask this person to set up a Debtor Account so that you can proceed with creating a new Job to hold the Quote. Again to set up the debtor you would click on the 'New' in the Edit Debtor column.

Shortname	Name	Street	Suburb	City	Client	Edit Debtor	New Job	SLA	Clos...	Phone	Calls	New Cal
A1 Con	A1 Concrete Pumping Ltd	128 Main Rd	Stoke	Nelson	A1 Con	D	J		0	5443199	2	Call
Adam	Adam Langbridge	56 Mount St		Nelson		New			0		1	Call
ADCInt	ADC International	1327 Broadway		New York	ADCInt	D	J		0			Call
Andria	Andria	No Street Address				New			0			Call
APrakash	Amit Prakash	No Street Address				New			0			Call
AutoElec	Automotive Electrical	25 Tay Street	SunnySide	Nelson 7020	AutoElec	D	J		0	+64 (03) 208 1508	4	Call
Baily	Baily & Sons Ltd	56 Long St	Stoke	Gore	Baily	D	J		0	+64 (03) 208 1381		Call
Baldrick	Baldrick Plumbers	29 Manners Street	Browns Bay	Auckland	Baldrick	D	J		0	+64 (09) 215 7351	1	Call
Bartlett	GB Bartlett & Co Ltd	27 Horse Road		Marlborough	Bartlett	D	J		0	+64 (03) 208 2777		Call
Benzi	Benzi Knees Pickup Serv	453 Main Street	Highland Park	Auckland	Benzi	D	J		0	+64 (09) 208 1254		Call
Blight	Blight Electrical	49 Todd Road		New Plymouth	Blight	D	J		0	+64 (06) 356 4561		Call
Bloomers	Bloomers Floral Display	354 Daisy Road	Ilam	Christchurch	Bloomers	D	J		0	+64 (03) 208 2016		Call
BPollock	Brian Pollock	80 Cleveland Tce		Nelson	BPollock	D	J		0		1	Call

Create a New Job

Once a Debtor Account exists, a new Job can now be created for the purposes of holding the Quote.

To log a new Job to hold a Quote:

1. From the **JobFlow** menu, click on the **Log Jobs** menu item.

2. Use the filters to search for the Debtor.

3. Assuming a Debtor Account exists; click on the 'NewJob' item held in the **New Job** column for the organisation a new Job is to be created for. This action opens the Job form.

4. When viewing the Job form, note that the Debtor Account name has been automatically entered in the **Client** field.

5. Click on the **Contact Details** tab. This tab holds the customer's contact details. Update the contact details held in the database, if applicable.

6. Enter the job description for the Job in the **Description** field (located in the header).

7. Click on the **Job Details** tab to enter the Job details as normal; refer to the Jobbing & Job Management training note for further information. Note that when setting up a Job to hold a quote, the following steps will need to be taken:

   · Invoice Queue will need to be set to 'Quoting'.

   · Status needs to be set to the QR (or XQT) Job Status type.

QR	Quote Request	Used when a quote has been requested by a client. Also used while the quote is being prepared.
XQT	Quote Template	Used if you are preparing a quote to be used as a Quote template.

8. Click the **Apply** button to save the Job details. When the **Apply** button is clicked, Nimbus will automatically assign a job number to this job. The job number is displayed in the **Job No** field.

Enter and Save Quote Details
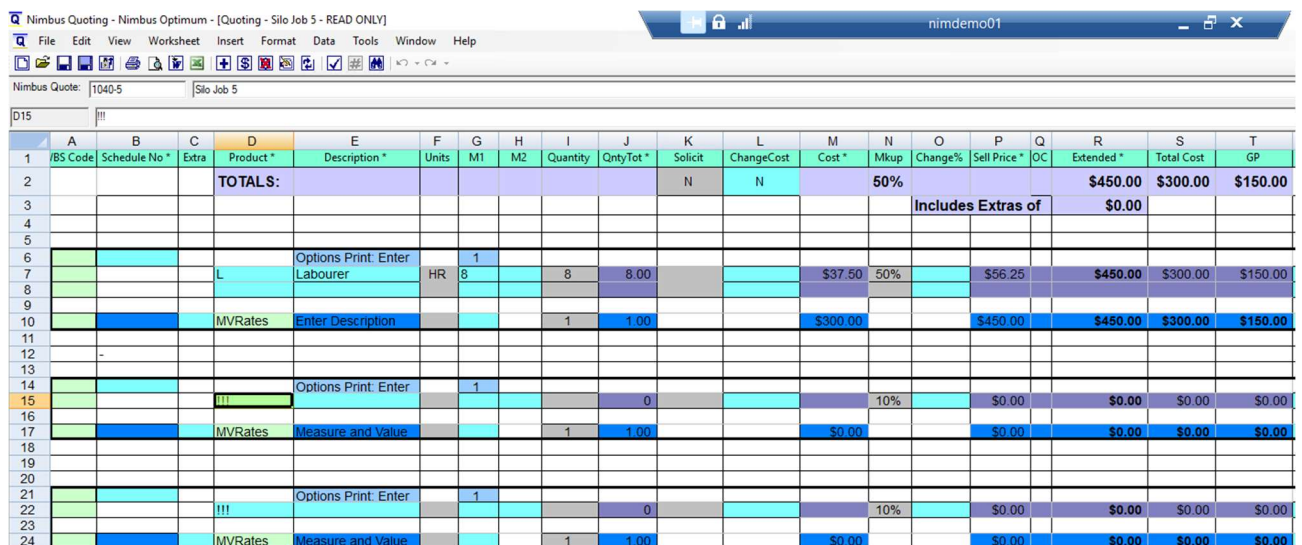
Now that a Job has been created to hold the Quote, the Quote can be prepared. This is done using a template.

Nimbus is shipped with standard templates:

Cost Plus	A template that takes the latest cost, adds a stock mark-up, and then adds an overall mark-up. The mark-up can be manipulated.
Quoting	A template that uses schedules. Takes the cost and adds a mark-up. The mark-up can be manipulated. If the quote is accepted, this template can be used for quote spreading, i.e. each schedule is assigned to its own Job.
Quote Spread	Do not use this template when preparing new quotes. It exists only to aid in the viewing of quotes that have been spread for Projects.
Sales Order	A template that is used for ordering pre-sold goods currently not in stock. Also used to issue stock when it arrives.

These are "blank" templates that are laid out in a particular way to make it easy for you to prepare a quote.

For example the standard Quoting template looks like this:-

In addition to the blank templates, you can maintain templates that are pre-populated with the items that are required to complete a specific type of work that you are regularly quoting for.

For example: Siteworks, a template could be set up as follows:-

How you proceed after logging a Job to hold the quote will depend on where you want to start – with a blank template, or a pre-populated one.

Starting with a Blank Template

If you have just created a new Job and the Job form is still open, the template can be accessed by clicking on the **Quote** button. On the other hand, if the Job form has been closed, then the template will need to be accessed from the **To Quote** menu item held in the **JobFlow** menu.
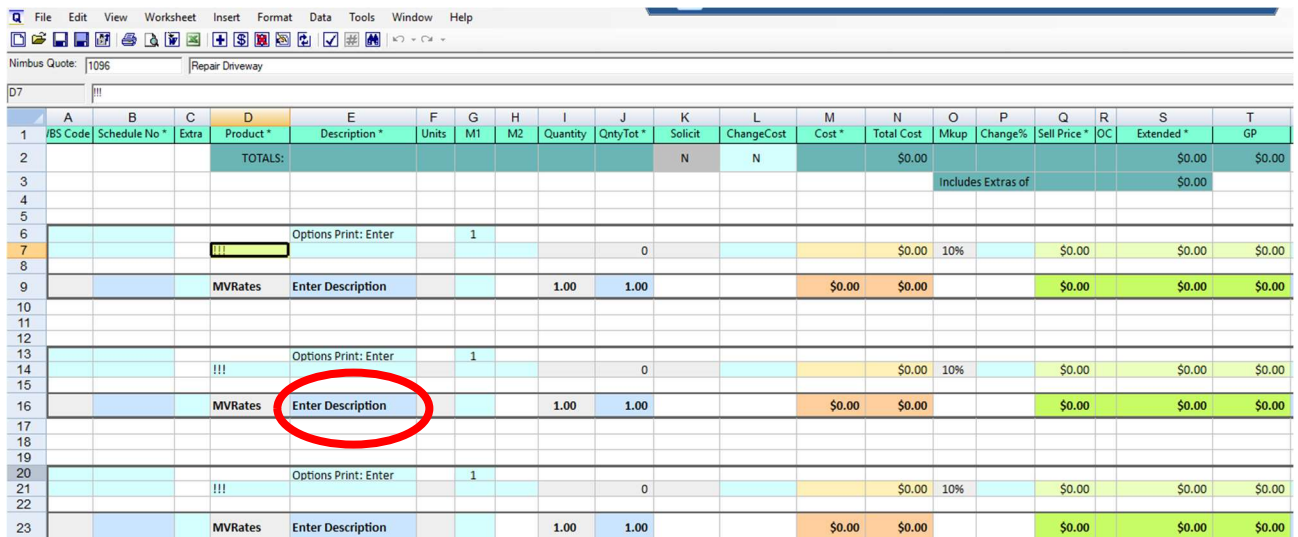
To prepare a quote from the To Quote menu item:

1. Click on the To **Quote** menu item on the JobFlow menu. The below report shows all jobs with a status starting with 'Q':

Jobs to Quote : Jobs that have a Q status. The quote needs to be prepared, completed, or followed up.

Filter : No Filter

Branch	Client	▼ Job No	Description	Status	Supervisor	Days To Go	Style used	Invoice Type	Make Project	Spread Quote
	Bartlett	1098	Testing this job logging with GBV	QR	Adam		Quoting	Jobbing		
	BrownMol	1096	Repair Driveway	QS	Adam	-306	new	Quoting		
	DataStor	1095	Buld steel frame	QR	Wayne		Quoting	Quoting		
	Geni	1088	Tender for the New Roading around Geni Central	QR	Michelle	-339	Quoting	Quoting		
	Captcook	1085	test job	QR	Michelle	-475	Quoting	Quoting		
	Baldrick	1082	showing demo	QR	Michelle	-490	new	Jobbing		
	Cooper	1040-5	Silo Job 5	QA	Michelle		Quoting	Contract	1040	spread
	Cooper	1040-4	Silo Job 4	QA	Michelle		Quoting	Contract	1040	spread
	Cooper	1040-3	Silo Job 3	QA	Adam		Quoting	Contract	1040	spread
	Cooper	1040-2	Silo Job 2	QA	Michelle		Quoting	Contract	1040	spread
	Cooper	1040-1	Silo Job 1	QA	Michelle		Quoting	Contract	1040	spread
	Cooper	1040	603 Grain Silo	QA	Brian		Quoting	Contract	newP	
	Johnson	1026	Siteworks	QS	Adam	-2791	Quoting	Quoting		
	Johnson	1010	Freeze Dryer Johnson EX	QS	Brian	-2775	Quoting	Quoting		

2. All of the jobs listed will either need a quote prepared, or be in the process of having a quote prepared and finalised. The Style used column indicates whether a quote is yet to be started 'new' or if a quote template has already been applied and begun i.e. 'Quoting', ''CostPlus' etc.

   a. Click on the **Job No** field to begin preparing a quote where the **Style used** column says 'new'. This will open up the default Quoting template:

3. Sometimes, when a user opens the **Quoting Application**, the template you want to use is not the default one that is opened.

   To set a template as your default:

   a. From the **Tools** menu (located on the menu bar of the existing template), select **Quote Template** and then select **Set Default**.

   b. From the list given, select the template you want as the default and then click the **Select** button.
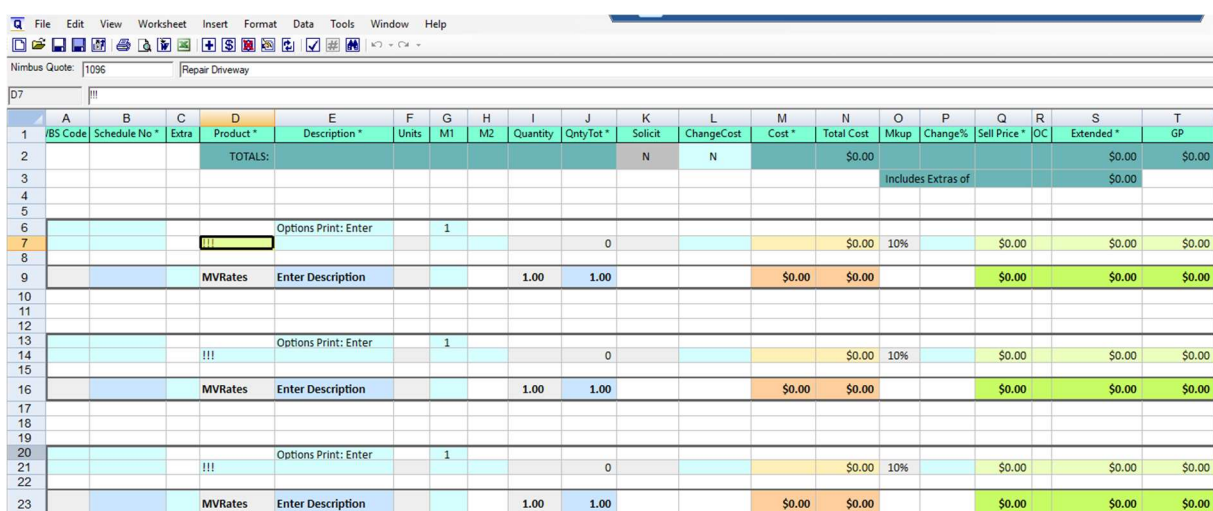
   To use another template without changing the default template:

   a. Close the default template window; to do this use the lower **X**, not the top **X** in the Window Header.
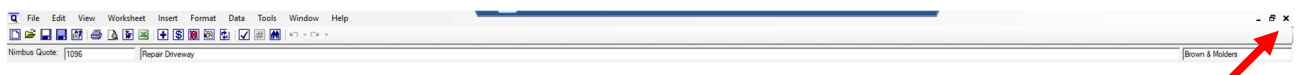
   b. From the **File** menu select **Open Template**.

   c. From the list given, select the template you want to use and then click the **Select** button.

   d. Enter the Job Number in the **Nimbus Quote** field. A lookup is available, if required. (A quote cannot be saved unless it is connected to a Job.)

4. All quoting templates have a Window Header, a Nimbus Quote Reference row and a Cell Reference row.

|	
Window Header	The Window Header contains the Database name, the Quoting Template name and the Job Description in brackets; refer to the example below.
Nimbus Quote Reference	The Nimbus Quote Reference row (located below the Window Header but above the grid) displays the Job details e.g. the Job Number, Job description and the Debtor name.
Cell Reference	The Cell Reference row (located immediately below the Nimbus Quote Reference row) displays the grid cell reference and any information within the grid cell. For example, if any cell in the grid is selected, then the Cell Reference row will display the row and column reference for that cell (e.g. H5) as well as the information held within that cell such as a formula or text.

The methods for entering and saving a Quote are similar for all templates; however, the instructions that follow will specifically refer to the 'Quoting' template, as shown above. To simplify the differences between templates, it is a commonly used practice that the data entry fields in each template are green. The **Quoting** template uses schedules.
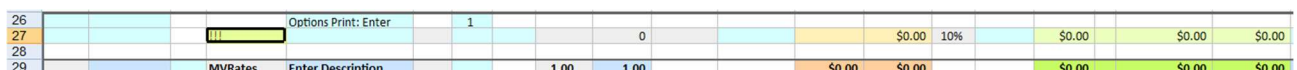
1. There are three schedules in the 'Quoting' template.

   A blank schedule is held in the Schedule Tab of the Template
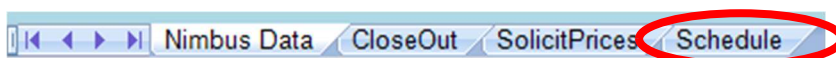
   To insert additional Quoting schedules on the Main tab, click in the first cell of the row that you want to insert a schedule on. Right click and select Insert Schedule.

   A new schedule is inserted.

2. Note that if you make a mistake you can use the Undo and Redo buttons located at the far right of the header icons. Clicking on the down arrow symbol next to each icon shows what will be undone/redone in drop down lists.

3. In the first schedule, start in the top row, in the **Schedule No** column. Enter a description for the first step that will need to take place if the quote is accepted,
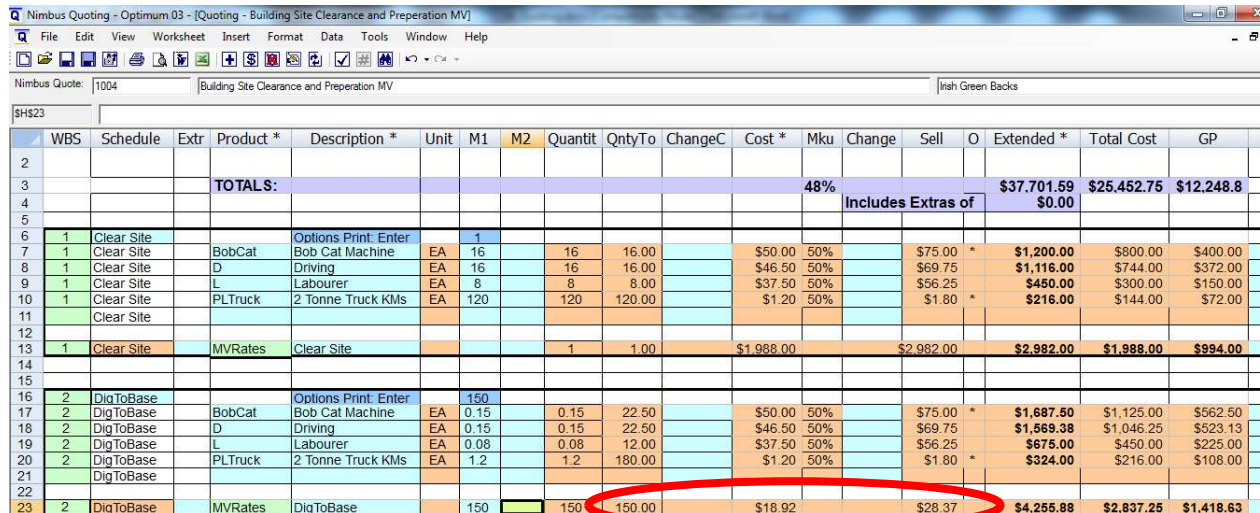
e.g. Design Work. Press **Enter**. This action duplicates the entry further down the schedule, in the **Schedule No** column.

4. In the same schedule, move to the cell holding the **!!!** marker in the **Product** column. Resources (such as Stock, Time, Plant etc.) will be used if this quote is accepted, therefore enter a resource code into this cell. A lookup is available, if required. This is a compulsory field. Once a resource code has been entered, the description, cost price and sell price for this resource code are automatically displayed in the **Description**, **Cost**, and **Sell Price** fields. In addition, pressing **Enter** also causes the schedule to expand so that another line is created for the next entry.

5. Press **Tab** to move to the **M1** column. This represents Multiply 1. M2 represents Multiply 2. M1 x M2 creates the value for the Quantity field e.g. if you are quoting Labour, enter the hours in M1 only and this will update the Quantity accordingly, however if you are quoting concrete and have an area of 6 m x 8 m, both these values are entered in M1 and M2 respectively to correctly calculate the necessary measure of concrete in the Quantity field.

6. Press Enter to move to the next line. Note that this action causes the extended sell price, the extended cost price and the gross profit to be calculated. These amounts are displayed in the **Extended**, **Total Cost** and **GP** columns.

7. The amounts held in the **Cost** column cannot be edited. If the amount in the **Cost** column needs to be modified, enter the new cost amount in the **Change Cost** column instead and then press **Tab**. This action will overwrite the amount previously held in the **Cost** column.

8. Enter transaction notes (if any) in the **Notes** field.

9. Enter the remaining time and materials on the second and subsequent lines on the first schedule.

10. Repeat the above steps for any other schedules that need to be prepared to complete the quote.

11. If a Measure & Value (MV) rate is to be calculated for a schedule, enter the measurement unit quantity in the **M1** field on the **MV Rate** row of the schedule. The total sell price will then be divided by the amount entered in the **M1** field to give the MV rate per unit.

For example, note the 'Dig to Base schedule in the quote below. Sell Price = $4255.88.

The items in this quote are digging to base. The items could be quoted as above, i.e. sell price for all materials will be $4,255.88. Alternatively, the materials could be quoted as a sell price per metre. To do this a measure and value rate needs to be calculated. Enter the number of metres of materials to be dug out (e.g. 150) and the MV Rate is calculated, as shown below.

The extended sell price is still the same, but the printed summary quote will show a quantity of 150 instead of a quantity of 1, and the rate will be $28.37 per metre. (Note that MV Rates do not have to be calculated for every schedule; only use this feature when it is applicable.)

12. Save the quote. There are three ways of doing this.

c. Click the 💾 **Save** button on the Toolbar to save the quote and keep the template open. This method allows you to continue working on the quote.

d. Click the 💾 **Save and Close** button on the Toolbar to save the quote and close the template. Don't use this button unless you have finished with the quote for the time being.

e. The 🗗 **Save, Commit and Close Quote** button on the Toolbar to save and commit the quote and close the template. NOTE: a committed quote cannot be modified therefore this method should NOT be used until the Quote has been accepted. Changes to a Quote often arise after follow-up work has taken place and if the quote has been committed, you will not be able to edit the Quote.

Note that if the template is closed without saving changes, the following message is displayed.
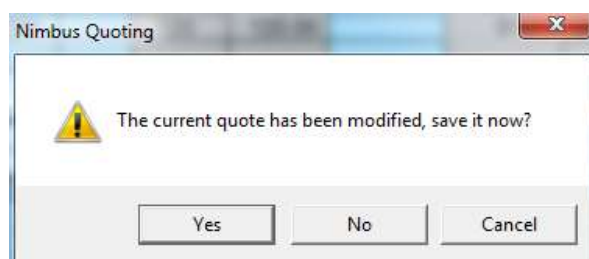
Click the **Yes** button to save changes. The template will close after the changes have been saved.

Starting with a Pre-Populated Template

Where you have pre-populated templates set up for particular types of work, you may want to start with one of these as the basis of your quote, as opposed to a blank template.

1. Click on the To **Quote** menu item on the JobFlow menu to open the Jobs To Quote Report.

2. Click **Quote Template List** header link

3. Click on the **Description** of the Template that you wish to use. This opens that Quote

4. In the Header area of the Quote, enter your Job Number in the Nimbus Quote field. The following message will appear:-
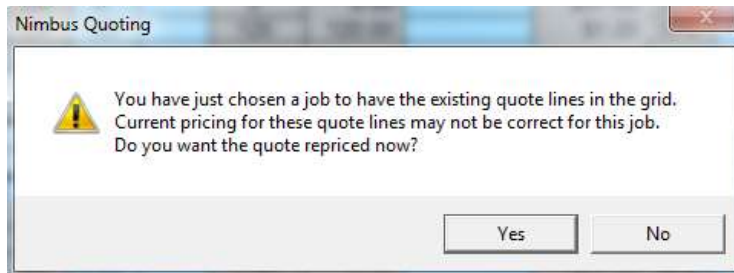
Usually you will click Yes so that the latest information from the stock file is used, together with Discount/Special prices for the job where applicable. If you don't want to update pricing, then click No.

5. The Quote Template will now open against your Job.

Click the Save Icon to save the Quote.

6. The lines in the quote can be edited, as normal.

7. To **search** for text in the quote, click on a cell in the column you want to search. Right-click and select Search Column to open the following form.
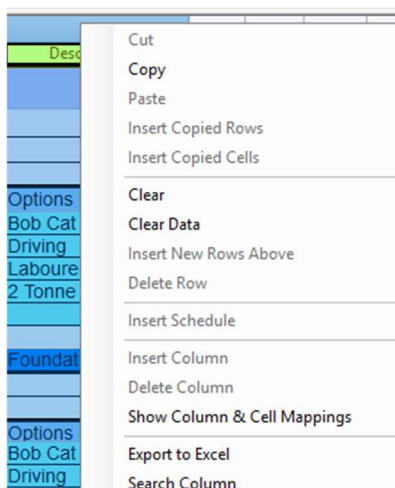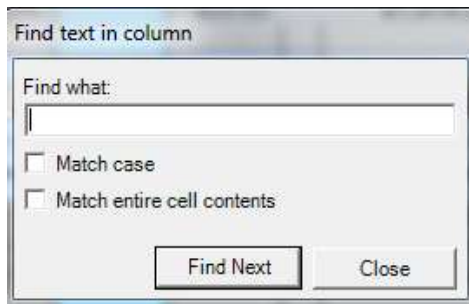
Type in the text you want to search for and click **Find Next.**
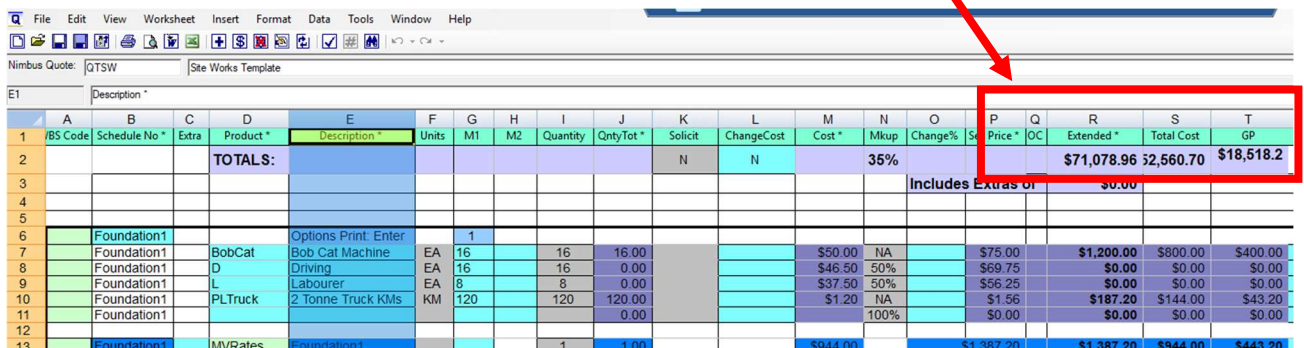
8. Any imported line items not relevant to this quote can be easily removed, as follows:

   a. Change the quantity for these line items to zero.

   b. When all line items to be deleted have a quantity of zero, click the **Remove Zero Quote Lines** button on the Toolbar. This action will remove all lines with a quantity of zero.

Continue to enter line items in the new quote, as required.

Analyse Financial Results

The top row of the grid displays the running totals, as shown below. These totals are updated each time a new line item is entered into a schedule.

When preparing a Quote, there is a delicate balance between making enough profit without losing the Job due to overpricing. The running totals are designed to help you with this as the Quote is being prepared.

The profit margins in the running totals are controlled by set fields, e.g. sell price field. These in turn are controlled by organisational policy, e.g. 10% mark up to be applied on all stock items. Sometimes the set nature of these items needs to be 'tweaked' a little. Perhaps you know a higher price can be achieved, or perhaps competition is so great, the margin needs to be lowered to remain competitive.
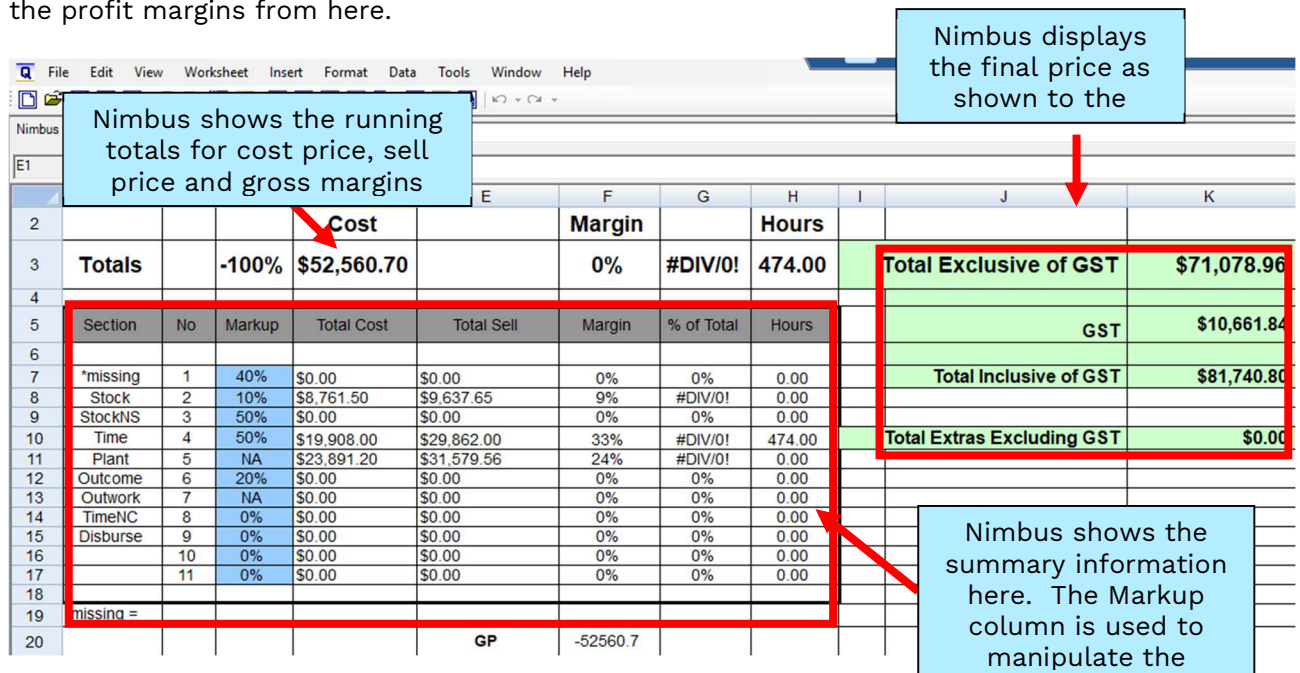
Whatever the scenario, the **Close Out** tab in the template is designed to help you 'tweak' the quote when required. To access this worksheet, click on the **Close Out** tab at the bottom of the template.

The **Close Out** worksheet summarises the information held in the quote. This summary allows the user to analyse the financial results more carefully. Users can also manipulate the profit margins from here.

Line items in the quote are summarised by section; these are held in the **Section** column. The most common sections are listed, i.e. Stock, StockNS, Time, Plant, Outcome, Outwork and TimeNC. Note that if #N/A appears in the cells on this worksheet, it means that you have entered a line item in the Quote that belongs to a section that is not represented on the **Close Out** worksheet. Ask your Nimbus Consultant to insert the section.)

- The cost price of all sections are totalled and displayed in the **Total Cost** column. The sell price of all sections are totalled and displayed in the **Total Sell** column. The gross margin for all sections is calculated and displayed as a percentage in the **Margin** column.

- The total sell price for all sections is then compared as a percentage of the total sell price of the quote and displayed as a percentage in the **% of Total** column.

- Time is totalled and displayed in the **Hours** column.

Manipulating the margins occurs in the **Markup** column. For example, if the current mark-up is 40% for the stock section and you want this to be 50%, enter 0.5 in the **Markup** column and then press **Enter**. The running total amount will update together with the section line item. Cost price remains the same.

Use the **Close Out** worksheet to 'tweak' the quote, as required.

During this process, refer back to the worksheet where the initial information was entered.

Check the **OC** column; an asterisk appearing in this column means that the item is being overcharged (OC). That is, the sell price for this item in the resource file is being exceeded in the quote   The asterisk is meant as a warning when 'tweaking' the quote. To find out how much the item is being overcharged, refer to the **Stock Sell** and **Overprice** columns further along in the worksheet, past the Ordering section.

When all 'tweaking' of the quote is finished, save the changes.

Export to Excel

To export the worksheet to Excel, click on the **Export to Excel** icon.

Print Quote

Quotes can only be printed from the template.   The MS Word template can be customised to meet your requirements, or additional templates can be set up; see your Nimbus Consultant.

To print the standard summary quote:

1. Open the quoting template for the quote that needs to be printed.   This means that if you closed the template you will need to reopen it to print the quote.

2. From the **File** menu select **Send to Word** and then select the **Quote.dot** option. The quote together with an accompanying letter is generated. You can save the quote document to the suggested path and print as required. Note that the quote table includes one line item for each schedule; this includes the empty schedules. To tidy the table, delete the empty schedules before printing. This can be done in the MS Word document, or in the quoting template before the Quote is previewed in MS Word.

3. An alternative method of printing the summary quote is to click the **Send to Word** button on the Toolbar. Once the quote has been generated, save the quote document to the suggested path and print as required.

4. Send the quote to the client.

Change Status

During the quote preparation stage, the status for the Job is QR (quote request). However, once a Quote has been sent to the client, users will need to update the status to QS (quote sent). This is done in the Job form. The new status means that a list of quotes that need to be followed up can be generated.

To change the status:

1. From the **JobFlow** menu, click on the **To Quote** menu item. A report is displayed showing all the jobs with a Q status type; i.e. a list of all the jobs that are still at the quoting stage.

    · A job with a QR status means that a quote needs to be prepared (or completed).

    · A job with a QS status means that a quote has been sent but it needs to be followed up.

    · A job with a QA status means that the quote has been accepted but a job has not yet been allocated.

2. Filter on the QR (Quote Request) status to find all quotes that need to be prepared (or completed).

3. For the job that needs the status updated, click on the Description. This action opens the Job form.

4. Using the drop-down list in the Status field, change the status to QS (quote sent).

5. Click OK to save changes and close the form.

6. Refresh the web report to update it. The job that had the QR status should now show the QS status. Filter on QS to find all quotes that need following up.

A quote is either accepted or rejected. Once this is known, the status must be updated once more to reflect what has happened. Use the method above to change the status.

If the quote has been accepted:

– Change the Status to QA (quote accepted), or JL (job logged) if the user updating the Job form is not responsible for the allocation of jobs. A QA status indicates that no further follow-up on the quote is necessary as the quote has been accepted. A JL status indicates that a Job has been logged but it still needs to be allocated so that the Job can begin.

– Change the Status to JA (job allocated) or JP (progress job) if the Job has been allocated and can commence.

If the quote has been rejected, change the Status to XQ (quote lost) or XQA (alternate quote used).

Refresh the **To Quote** web report to update the report. If the Job was updated with a QA status, the Job will remain in the **To Quote** report. However, if the Job was updated with a 'J' status, the Job will be removed from the **To Quote** web report and placed in a more relevant report such as the **To Issue** or **Allocated** reports

More On Saving Quotes

When a quote is saved, the lines in the grid are posted to Nimbus as Job transactions with a Sub-Ledger of Quoting.

To save a quote, click the   **Save Quote** button on the Toolbar. This action saves the quote and keeps the window open so that you can continue working on the quote. A quote that has been saved this way can be amended at a later stage.

To save and close a quote, click on the   **Save and Close Quote** button on the Toolbar. Several attempts are often made in the preparation of a quote, and when this is the case this particular button provides the best method of saving the quote at the end of each attempt to finish it. A quote that has been saved this way can be amended at a later stage.
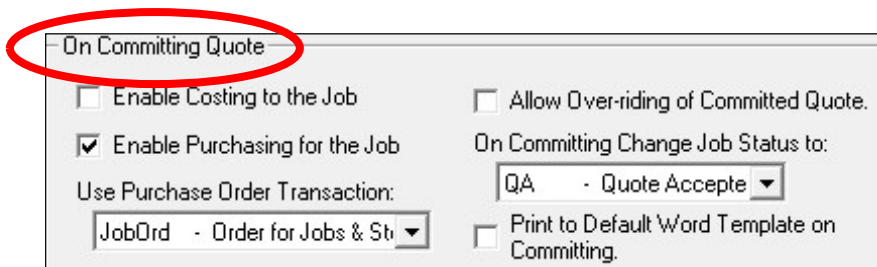
Both these Save options only affect the Job transactions in the Quoting Sub-Ledger.

To prevent a quote from being edited you will need to commit the quote. As far as workflow procedures go, it is a good idea to save the quote only, i.e. don't commit it. This way the quote can be amended if the client requests any changes to be made. The quote should be committed only once the quote has been accepted. A committed quote cannot be amended. (Once a quote has been accepted, you do not want the quote to be amended, hence the process of committing the quote.)

To save, close and commit a quote, click on the **Save, Commit and Close Quote** button on the Toolbar. This method of saving the quote will prevent users from amending the quote at a later date.

Upon committing, an error message may arise indicating that Nimbus can't commit the quote because of one reason or another. If this is the case you will need to attend to the issue before the quote can be committed.

Specific actions can also be set up to occur when a quote is committed. For example, when the quote is committed, the settings below can enable purchase orders to be automatically generated for all items on the quote that are not in stock, using the **Order for Jobs or Stock** purchase order transaction type. In addition, the system will automatically change the status to QA. If Enable Costing to the Job is ticked as per the image below, this would post the items in stock to the job automatically and create Job transactions with a Sub-Ledger of Costing. If you require any of the other settings to occur upon committing, see your Nimbus Consultant.

Viewing Quote Details

From time to time you will want to view a quote, particularly if the quote has not been accepted yet and manage the quote accordingly. To view the quote details:

1. From the **JobFlow** menu, click the **To Quote** menu item.

2. Filter to the relevant job. The Style used column displays the Quote template used for this job. By clicking on the field in this column a list of materials is produced which can be sent to Suppliers for pricing. In addition this report tells you how many days until the Quote is due to the client via the Days To Go column, (the Due Date comes from the Due at field on the Job Form). The Status column helps you identify where in the Quoting process your quote is at.

Jobs to Quote : Jobs that have a Q status. The quote needs to be prepared, completed, or followed up.
Filter : Status contains qr

Branch	Client	Job No	Description	Status	Supervisor	Days To Go ▼	Style used
				qr			
	Geni	1088	Tender for the New Roading around Geni Central	QR	Michelle	-339	Quoting
	Captcook	1085	test job	QR	Michelle	-475	Quoting
	Baldrick	1082	showing demo	QR	Michelle	-490	new
	DataStor	1095	Build steel frame	QR	Wayne		Quoting
	Bartlett	1098	Testing this job logging with GBV	QR	Adam		Quoting

3. Click on the **Job No** field to open a report summarising the quote details relevant to the Quote template used i.e. a Job using the **CostPlus** quoting template will open

the **Job Enquiry Detail** report with items having a Sub-Ledger of Quoting; a Job using the Quoting template will open the **MV Rates** report which summarises the Quote by each Schedule.

MV Rates : For looking at previous rates pricing. Drill to detail.
Filter : Job No equals 1088

Branch	Rate Code	Rate Description	▲ Scheduled Item	Rate	Quantity	Amount
	MVRates	Measure and Value base	donaldson	$2,288.25	1	$2,288.25
	MVRates	Measure and Value base	Drain1	$1,141.00	8	$9,128.00
	MVRates	Measure and Value base	Foundation1	$1,087.20	1	$1,087.20
	MVRates	Measure and Value base	Measure and Value base	$2,243.16	1	$2,243.16

Further detail can then be opened by clicking on the **Scheduled Item**.

Each of these reports is specifically set up to display the data with relevant columns and information to ensure you have what you need to follow up the Quote or take any action required.

Recalculations

Most quoting templates will never need to be recalculated. However, some of the more complex quoting templates may need to be recalculated. For example, when you have a quote which includes products in the template and you just put a Qty in every line, the **Extended Price** gets calculated automatically line by line. However, if you have Totals at the bottom (or any other such formulae) recalculation is needed when all the quantities have been entered to get the workbook totals to recalculate.

To make a recalculation happen, click on the **Recalculate** button on the Toolbar, as shown below.

Quoting Reports
All quoting reports can be viewed from the Enquiry menu.

To view the quoting reports:

1. From the **Enquiry** menu, click on the **Report List** menu item.

2. Enter 'quote' in the **Report Name** filter field. This action displays the list of quoting reports available, e.g.

Jobs to Quote	This report lists all Jobs with a QR, QS or QA status. The report can be used by the people that prepare the quotes. For this reason, the report also appears as the **To Quote** menu item in the **JobFlow** menu.
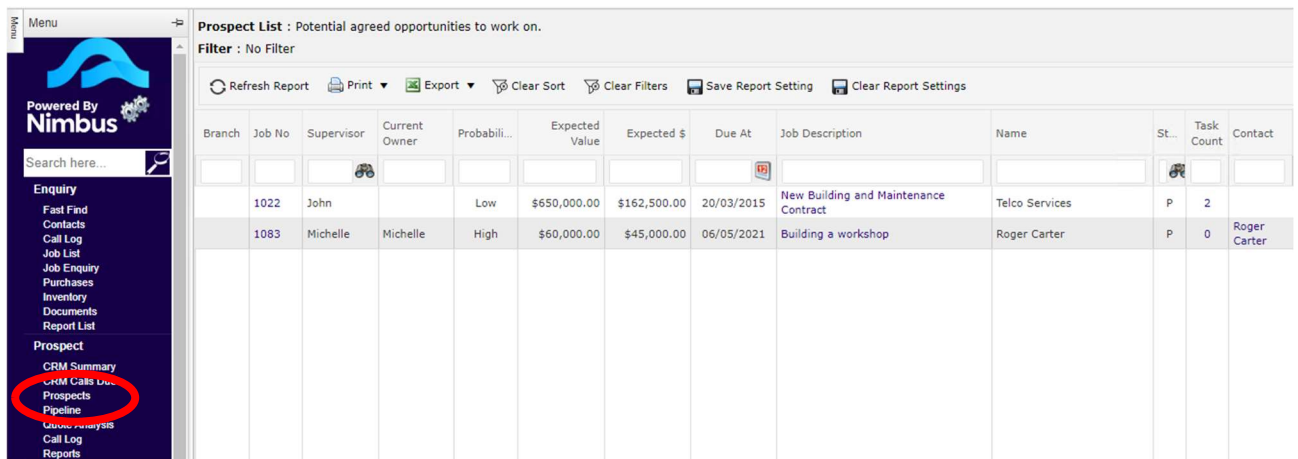
Quote Analysis Division	This report provides Annual totals of Quotes Completed/Lost by Profit Centre.
Quote Analysis Salesman	The report provides Annual totals of Quotes Completed/Lost by Salesperson.
Quote Analysis Job	This report analyses the effectiveness of your quoting process job by job. Use the filters to display the data relevant to you. Columns include Quote $ in Progress, Quote $ Completed, Quote $ Lost, Costs Completed, Quote GP $ etc.

Appendix A - Prospects

If you are using the **Prospects** system in Nimbus, sometimes you may want to prepare a Quote on the prospect Job that is already logged.

To check whether a Prospect Job already exists in the system:

1. From the **Prospect** menu, click on the **Prospects** menu item. This action opens the **Prospect List** web report, as shown below.

2. Use the **Name** filter field to check if the organisation requesting the quote is listed here. If the name is not listed here, a Prospect Job does not exist for this organisation. A new Job will need to be created to hold the Quote.

3. Use the Job **Description** column to check for the Prospect Job that could hold the Quote. If a suitable Prospect Job does not exist, a new Job will need to be created to hold the Quote.

If a Prospect Job exists for the Quote that has been requested, the Prospect Job will need to be converted into a Job that can hold a Quote.

To convert a Prospect Job into a Job that can hold the Quote:

1. Following on from step (3) above, click on the job description to open the **Prospect** form.

2. Using the drop-down list in the **Status** field, select the QR (quote request) status.

3. Click the **Apply** button to save the record.
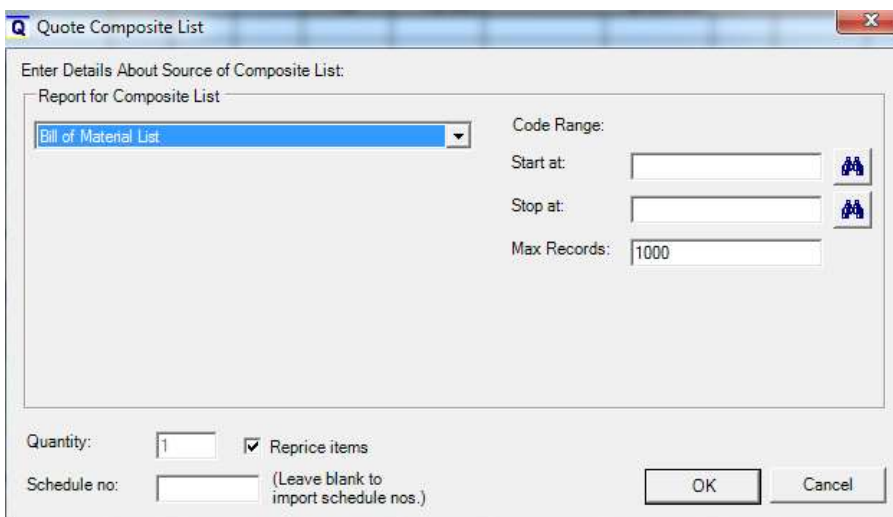
Appendix B – Using a Composite List

A composite list is a saved quote which acts like a template for other quotes. This quote lists all the line items required, including the quantities that make up the type of Job that you are quoting for. For example, a plumber might have composite lists for quoting on a standard bathroom, kitchen, etc. Each composite list will include a line item for each step in the process of plumbing that particular room. When the plumber prepares a Quote for plumbing a house, the composite lists are pulled into the Quote. The house specifications will determine which composite list is used in the Quote.

To use/include a composite list in your quote:

1. In the Job form, click on the **Quote** button to open the quoting template.

2. Select the cell where you want the composite list to be inserted. This will probably be the cell with the
    '!!!' marker in the **Product** column.

3. Click the ⊞ **Insert Nimbus Quote** button located on the Toolbar; the composite list form is opened.
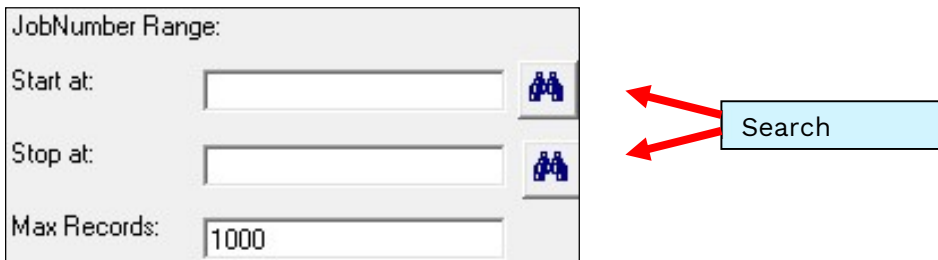
4. Using the drop-down list in the **Report for Composite List** field, select the type of composite list to be pulled into the quote being prepared. For the purposes of this training session, use 'Job Quote'. Note that true composite lists are created by making a Job with status XQT. The types below allow you to pull in information from any Job that has a Quote, but can be altered to just allow Jobs with a Status of XQT to be selected if required.

Bill of Material List	Pulls in stock line items for a Bill of Material i.e. the components of a Bill of Material item are brought through into the Quote.
Job Quote	Pulls in line items from a Quote that already exists in the system, i.e. a specific list of time/materials intended for the purpose of being imported.
Jobs Costing	Pulls in the costing transactions from an existing Job into the quote being prepared, i.e. users can use the actual costs from any Job to help prepare the new quote. The actuals are summarised, one line per item used.
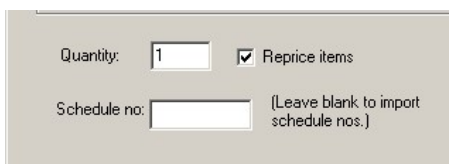
Jobs Schedule	Pulls a schedule from a Quote from an existing job that already exists in the system using the costed transactions. Non-chargeable time entries are omitted. Users must know the job number and schedule number for the system to pull the information into the quote being prepared.

5. In the Range section of the form (Job Number shown below), click on the search button beside the **Start At** and **Stop At** fields to select the composite list you want to pull into the quote being prepared.

6. The **Quantity** field (shown below) defaults to "1". A composite list is usually prepared for 1 job, however if the job has to be repeated several times, more time and materials are required. For example, if a composite list exists to plumb one toilet in a house but the house being quoted for will have two toilets, enter "2" in the **Quantity** field to automatically double the time and material quantities imported into the quote.
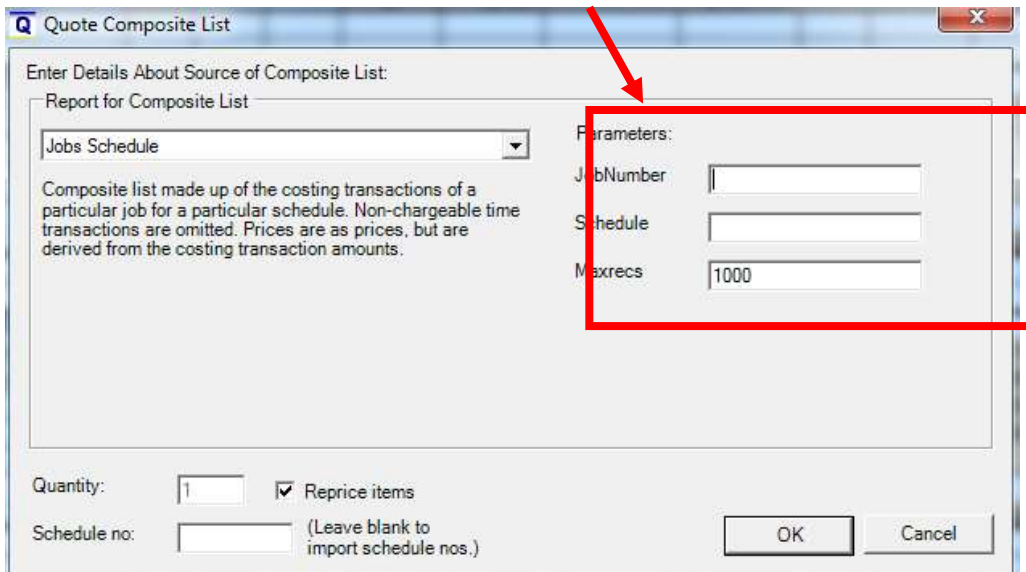
7. The Schedule No field is an organisational tool only. When using composite lists, the **Schedule No** field is usually left blank. A blank field means that the schedule number from the composite list will be used. Only use this field if you want control over the number that gets entered in the **Schedule No** field, as shown below.

8. This composite list type uses the current stock prices. Some composite lists import the sell price and the cost price that was used for a previous Job. This may not be the current sell/cost price. Tick the **Reprice Items** field to insert current sell/cost price for each item being imported. (The Reprice Items field is ticked by default; therefore, you only need to untick this field if you do not want the current sell/cost prices to be inserted.)Click the **OK** button. This action will import the composite list into the quote being prepared.

   The lines in the quote can be edited, as normal.

9. Any imported line items not relevant to this quote can be easily removed, as follows:

   a. Change the quantity for these line items to zero.

b. When all line items to be deleted have a quantity of zero, click the ▣ **Remove Zero Quote Lines** button on the Toolbar. This action will remove all lines with a quantity of zero.

10. Continue to enter line items in the new quote, as required. You can also repeat the above steps to import other saved quotes into the quote being prepared.

11. Note that if you decide to use the 'Jobs Schedule' type of composite list (as shown below), you will need to find out the Job Number and Schedule Number first as there are no search buttons to help you with this task.

12. Save the quote.

13. Print as required, changing the status to QS (quote sent) once the quote has been sent to the client.

Appendix C – Managing Pre-Populated Quote Templates

Quote Templates

Quote Templates give you a powerful way of being fast and accurate when Quoting Jobs.

They are very good for Manufacturing, as they can also contain the 'Quality Control Steps', i.e. the tasks required to build, test and release your product.

Of course the detail can be varied for any specific build or manufacture run.

Quote Templates are simply a Job's Quote that has been sanitised for copying for future quotes.

– Set the Job Status to XQT – Quote Template. This prevents accidental posting, protects from over-writing the quote, and puts it into the 'Quote Templates' List.
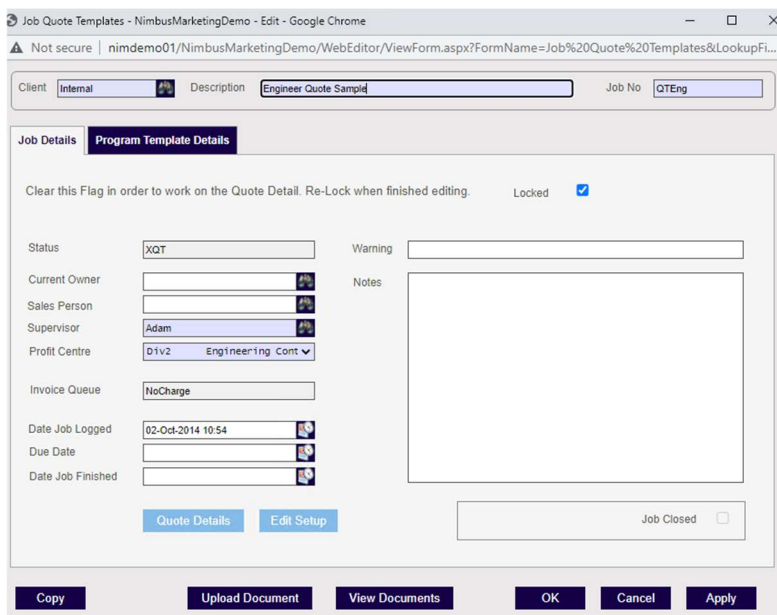
Branch	Client	Job No	Job Description	Quote Style	Profit Centre	Supervisor	Salesperson	Current Owner	Locked	Quote VTSFile
	Internal	QTEng	Engineer Quote Sample	Engineer	Div2	Adam			1	1676.vtn
	Internal	QTFD6	Manufacture Freeze Dryer FD6	Quoting	Div2	Adam			1	1675.vtn
	Internal	QTHrs	Hrs to Fit with Item Rates example	QuoteHr	Div2	Adam			1	1677.vtn
	Internal	QTSW	Site Works Template	Quoting	Div2	Adam			1	1678.vtn

– Keep these quotes updated for any errors, or change in process. If a Job goes over-quote, investigate why. If an item was missed, be sure to add it into the Template so that it won't get missed again.

Managing Quote Templates:

1. Run the **Quote Template** report (quickest from To Quote menu item, header link Quote Templates. Shows Jobs that are set as templates.

   a. To make an existing Job a Template, set its status to XQT.

   b. To make a new Template, click the Header Link **New Template**. Fill in Job fields, save the Job, then click **Quote** Button to build the quote. Commit the quote when you are happy with it.

2. **Edit a Template**. Click the Supervisor Column, e.g. the Freeze Dryer

   a. Unlock the template i.e. un-tick the Locked field and Apply. No one will be able to use this Template while it is unlocked.

      · Jobs must be open for maintenance. If this Template Job is closed, and the Office decide not to open it for you, then make a new Template Job, copy this quote to it, and then remove this Job as a template job by changing its status to say XQ.

   b. Click the Quote Button to edit the Quote. Add the items, changes mark-ups etc. as required. Save the Quote.

   c. Lock the Template when you are happy that this Template can be used again.