

Quantify Estimates

This session is designed for end-users who will be creating bids and estimates for your customers. This session covers creating estimates, creating shipments and reservations from estimates, and creating estimates from on rent balances at a job site. This session covers the information below.

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Agenda	
Create an Estimate	<ul style="list-style-type: none"> • Sale vs. Rent Estimates • Apply Discounts • Select Rate Profile(s) • Prorate feature • Adding Consumable inventory • Markup, Discount, and Profit Margin Calculators • Printing • Summary Estimate • Detailed Estimate
Copy to a Shipment	<ul style="list-style-type: none"> • Copy Estimate details into a Shipment
Copy to a Reservation	<ul style="list-style-type: none"> • Copy Estimate details into a Reservation
Create an Estimate from a Copy	<ul style="list-style-type: none"> • Copy Estimated details into a new Estimate
Delete an Estimate	<ul style="list-style-type: none"> • Deleting Estimates
Create an Estimate from a Job Site Balance	<ul style="list-style-type: none"> • Create an Estimate using Replacement Costs • Create and Estimate using Sell Prices
Create a Sell Transaction	<ul style="list-style-type: none"> • Copy Estimate details into a Sell Transaction