

## Estimates

Providing an estimate to a customer is a basic service for many retailers. It allows a customer to review pricing before they purchase and gives them a chance to negotiate the final price based on market pressures.

Creating and saving estimates in Eagle Point of Sale also benefits your employees.

It allows them to very efficiently recall all estimates and, if needed, make changes based on the customer's requirements.

In this class, we will discuss and demonstrate how to create an estimate, including the use of Estimate-specific fields in Point of Sale.

We'll also look at some useful options available in the Posting Menu, and we'll end with learning how to recall an estimate.

To get started, let's open Point of Sale and create an estimate.

### Topics

- Create an estimate
- Posting Menu
- Recall Estimates

### Create an Estimate

If you have used Eagle Point of Sale, you are already probably aware that the system allows you to complete certain tasks several different ways, and estimates are no different.

What I'd like to show you today is the preferred method for creating an estimate.

After signing in, the first thing you'll do is navigate to the Point of Sale Header screen. From the item field click on Customer and then Header on the Ribbon Menu.

The steps you take may differ, depending on how your point of sale terminal is configured.

In the Header screen, locate the Estimate button. In Eagle, the terms Estimate and Quote are used interchangeably.

When you press Estimate, the document marker in the upper left-hand corner of the header screen changes to read Create Quote. Once that appears, you're ready to create the quote.

A good practice at this point is to complete customer information, such as phone number and customer name. This helps a salesperson recall the quote at a later time.

It also ensures that the customer's name and phone number are printed on the hard copy of the quote.

While on the header screen, you have some decisions to make.

First, most quotes have an expiration date. The expiration date serves several functions. It limits the time that prices are guaranteed, thus insulating your company from huge cost increases.

Expiration dates also give the customer a time frame to accept the quote or ask for revisions.

An expiration date also gives you the option to purge expired estimates from the open orders file by running the Open order Report.

If you decide to use the Expiration Date option, click the down arrow here, and choose the date that the estimate and the prices on the estimate will expire.

For this example we'll choose a date 30 days in the future.

The Print Prices flag below the expiration date gives the user the ability to mask all individual prices and/or quantities on the Estimate document leaving just the total for the customer to review. Prices will remain visible on the screen.

This is typically done when doing an estimate for a larger project like a house package of doors, windows, lumber, and molding, and the technique is used to stop a customer from "cherry picking" the best prices off several companies' estimates.

The idea is if you have the lowest total price the customer would commit to the entire estimate, not just a few lines. It also helps protect your pricing strategy from your competition.

For this example we will choose to show prices.

The next decision is to choose how the Eagle prices the items on the quote.

The flag defaults to Retail but there are several other options, including List price, Discount Off Retail, Gross Profit Percent, Mark up from Cost, Retail with a Quantity Break Exclusion, and the five price matrix prices from Inventory Maintenance.

The two Cost choices, average and replacement, are typically used for internal company uses and not customer quotes.

Pricing can also be a user-defined price by simply overriding the Eagle default price.

For this example, let's choose Discount Off Retail, and then type ten plus a decimal point into the corresponding field to tell the Eagle to take ten percent off the Retail of every item posted to the estimate.

Next, choose which system cost to use. Four choices are available in the cost field including Average cost, Replacement Cost, Market cost, and Manufacture cost.

For this example, we'll accept the default of Average cost.

Now that you've used the tools Eagle offers to track and price the Estimate, the last step is to press Change to save what you entered on the header screen.

Now you're ready to add the customer's items to the quote. To do this, press Post to navigate to the Posting screen.

Posting items to an estimate is no different than adding items to a sale. Simply type the item number or scan the UPC number into the Item field, type in the quantity, and press Enter.

Remember, the pricing reflects the option chosen on the header screen. In this example, each price posted is ten percent off retail.

You've now completed the quote. All that is left is to total the transaction and finish the Estimate.

Press Total and the Finish menu appears. The Finish menu gives you several options, including to save with or without printing.

If you save without printing, Eagle displays the document number it has assigned to the estimate.

Instead of finishing the estimate right now, let's go back to the posting screen and I'll share a few tips for customizing your estimates.

## Posting Menu

Once you've posted items to the transaction, pressing the Menu button opens the Posting Menu options.

There are a couple of options here which can add value to the customer's estimate and also allow you to add items if they've accidentally been left off.

The first tool we'll look at is Insert Group Subtotal. Selecting this option opens a dialog box, and you can type a caption for the sub total being inserted, such as first floor framing.

Press Enter, and the subtotal is posted to the estimate. You can add as many subtotals as you wish.

Keep in mind that, while the caption appears on the screen, the subtotal itself does not. It only appears on the printed estimate.

The other tool is more of a utility that allows you to insert a line into a specific spot on the estimate. This is useful if an item is accidentally omitted or if the salesperson wants an item to appear on or before a specific line in the estimate.

Again, open the posting menu, but this time select Insert a Line. Then enter the line number that appears just before the new line you want to add.

## Recall Estimates

You've seen how easy it is to create an estimate, and how to use the Posting menu to add useful information. Now let's talk about how to recall and track a saved estimate.

The easiest way to recall an estimate is to use a technique called the dot look up. Click the customer field and type a period, followed by the estimate document number, and press enter.

This recalls and displays the quote.

If the document number is not available, use the Open Orders viewer to find the Estimate.

Like the dot look up, click in the customer field, then open the menu. Under the Viewer, select Documents. Once the viewer opens, you can bring up all the saved transactions for a particular customer, or you can change the Type field to Estimate, and press Refresh to view all estimates. Here's where entering the customer name pays off, since using that cuts down the time required to locate the saved estimate.

If there are a lot of estimates in the viewer and you're having a hard time finding the correct one, you can type the customer's phone number into the Short ID field and click refresh to bring those estimates to the top of the file.

Once you've located the correct estimate, highlight it and press Enter. This recalls the quote into point of sale for editing, or for changing the estimate into an order or invoice.

As you've seen, creating an estimate in Point of Sale starts on the header screen, and posting an item is no different than posting it to a sale transaction, except with an estimate you can save it, print it, and recall it for later use.

I'd encourage you to use what you've learned today and practice the different estimate techniques, so when you have to create a real one, you're ready!

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