

Sage Timberline Enterprise

Quotes

Stay on—or under—budget right from the beginning of the process. Sage Timberline Enterprise Quotes provides the means to help you quote fixed price work more accurately. Within the quote, estimate the scope of work and the associated costs, and then enter the quoted price. If the quote is approved, it automatically generates a work order for the job which reflects the fixed price from the quote.

Quotes can have multiple scopes of work. Develop an estimate of the scope of work and the associated costs, by using standard scopes and tasks or by manually entering line items.

You can also produce progress billing invoices for quoted work. For example, you can bill 25 percent at the start of the project, 25 percent when the project is half complete, and the remaining 50 percent at project completion. Quoted work can be billed by specifying percentages or flat amounts.

Features and efficiencies

- Specify the fixed quoted price for the work. The fixed price can be defined per line item or rolled up by line item type (labor, parts, miscellaneous).
- Specify a follow-up date for each quote. Using workspaces, you can easily track all outstanding quotes and easily find ones that need to be acted on.
- Define quote details such as customer contacts, the service center to perform the work, and the salesperson who sold the work. If approved, this information carries forward into the work order for the work.
- Print (or email) the quote using the default quote print format, or use the Report Designer to create tailored print formats for quotes.
- View quote summaries, including estimated cost, estimated profit, and estimated profit margin.
- If the work is approved by the customer, automatically generate a work order based on the quote information, including the tasks and line items in the quote.
- Eliminate duplicate data entry with tight integration to other applications.

Workspaces

- Apply filters to display exactly the information you want to see.
- Search for specific information using exact match or partial match criteria.
- View stored information on the screen through an interactive inquiry.
- Drill down from summary information to supporting data.
- Perform tasks with the shown information.

BENEFITS

- Generate fast, accurate quotes to ensure job profitability
- Use flexible pricing methods to specify the fixed quoted price for work
- Easily view enhanced quote summaries including comparisons of estimated cost and profit versus actual cost and profit

Quotes is a part of Sage Timberline Enterprise, a tightly integrated business management solution designed to simplify the complex needs of service and specialty contractors.