Synergist Spotlight on...

Improving the appearance of Synergist Quotations

Sending out a quotation document produced by Synergist can involve some trial and error. Although the output should hopefully look like a word/PDF document, creating it is not as simple as typing paragraphs into MS word. However, a Synergist quotation is performing more functions than a word document so reverting to sending these outside of Synergist is not best practice.

Producing your quote within Synergist feeds in to other key reports such as Work in Progress and New Business forecasting. It also aids the creation of sales invoicing which in turn can lead to improved cash flow. This months Spotlight gives some practical advice about how the appearance of quotations can be improved.

Estimate or Quote?

Having an estimate and a quote is essential for most jobs. The **estimate** should represent a realistic **delivery budget** based on hours or external costs. The **quote** tab should represent the **commercial value** of a job. The value/quantities quoted to your client. The output could be headed up as an 'estimate' or a 'quotation'.

The Difference Between an "Estimate and "Quote"

Estimate		Quote
Internal budget		**Client agreed charge**
Based on		Based on recommended charge:
• internal hours budget	**Build Quote** →	- Standard or client hours rate
• estimated purchase costs		- Marked up purchase estimates
• estimated expenses		• Can be titled "estimate" or :quote"
Internal cost and recommended charge		• Information can be revised, detail added, lines joined together bold / underlined applied

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Once an estimate has been created then clicking on 'Build Quote' on the quote tab will bring in your details.

1. **Save a variety of 'Build Quote ' views**

- Click on the quote tab and go to **Build Quote,** then select **Company Quote;** there may already be views in the list that are unique to your company.

- The Quote will display, with just the chargeable amounts next to each line item. Your Company may have a default way of quoting or individual **User Views** can be created using **Advanced Quote**.

Try the following views:
- **Roll up details** – as displayed above. This will produce one line per phase.

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- **Phase description & incl Phase comments as detail** - useful for entering a single price per phase plus a paragraph of text.

- **Roll up by activity type or charge codes** - if you estimate time in detail but want to roll up into a more summary view for a client.

2. **Join lines together.**

- Once you have 'built a quote' you can manually join two or more lines together. This allows you to add new text but join the values together.

- Click 'edit', 'join lines'. Note lines must be highlighted first.

3. **Display quantities and unit prices.**

- You might show need to show hourly rates and number of hours to your Client. These are displayed on the quote tab but not always on your quote layout. This is very simple to achieve. Contact the Synergist helpdesk if you would like to be able to quote and show a breakdown by quantity & unit price.

| quantity	unit price	%disc	value
100	£100.00		£10000.00
50	£120.00		£6000.00
10	£100.00		£1000.00
6	£200.00		£1200.00
6	£100.00		£600.00
50	£100.00		£5000.00

4. **Add extra items to a quote without 'rebuilding' the quote.**

- Use the 'append selected estimate item to quote' feature. When an additional item is added to the original estimate, you can add this line to your quote without having to re-build the full quote.

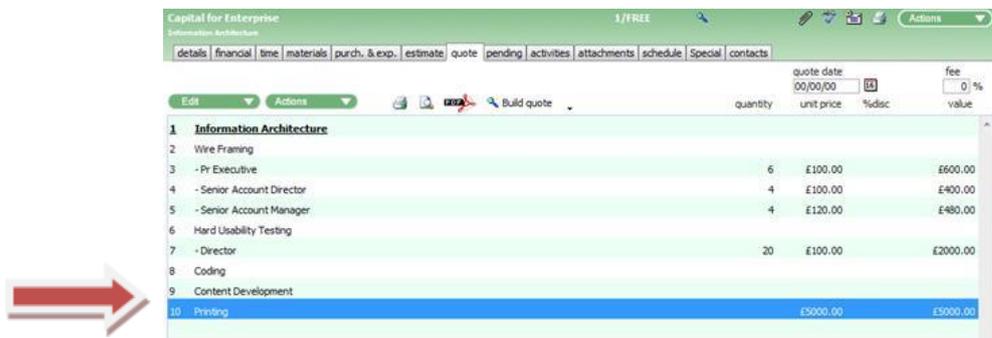- Click on the additional item to highlight it, and then click on the "actions" button.

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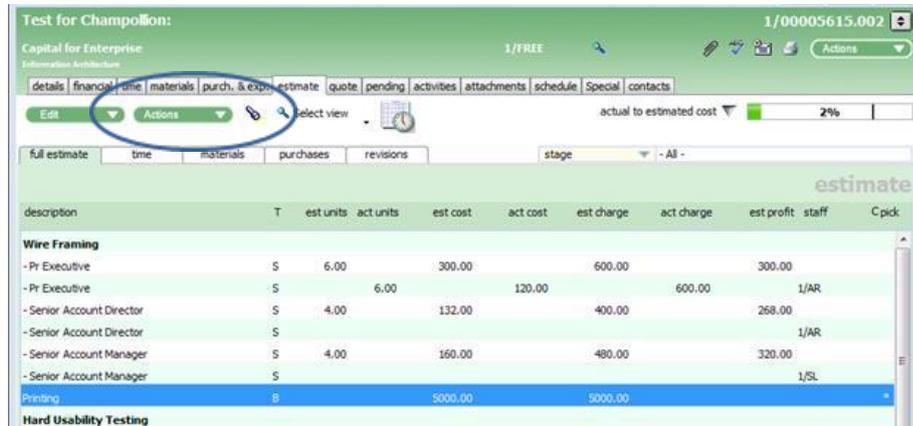
- From the list box select "Append selected estimate items to quote".
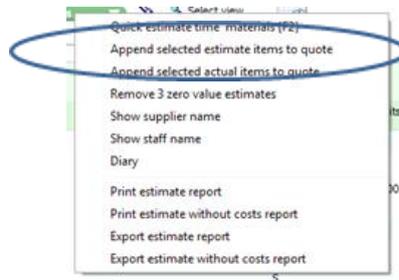
- The selected item is then added to your original quote.

5. **Print out your quote with the address details etc. on page one only. All other pages print out as continuation pages.**

   - Continuation headers could be produced by the Synergist helpdesk. Not all layouts suit this process and newly designed layouts are likely to be chargeable. However, in approving the appearance of your quotes, this could be worth exploring.

6. **Auto Attach terms & conditions to your Quote.**

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- A PDF of your terms & conditions could be attached or inserted as the final page of the quote. Contact us if you would like more details on this.

7. Quote Options

- A new feature that allows for items to be marked as 'optional' on a quote. Very useful if quoting different quantities of optional items to your client. Optional item costs are not included in the quote total. This feature is detailed in the v10.6 release notes.

  See www.synergist.co.uk/support/release-notes for full details.

- An additional chargeable layout will be required. Please contact us if you would like more information on Quote layouts.

8. Activate 'quote fee' settings.

- 'Quote Fee' allows for an additional line item to be added as the last line of your quote. It will calculate a percentage of the quote value and add this as an additional line. This could then be used as a percentage mark up e.g. **Project Management Fee** or if added as a negative percentage it would show as a % **discount.**

- To activate this feature go to Tools & Settings/Company Settings then to the switches tab. From here you can switch on "quote fee" and edit the wording that is auto displayed on a line e.g. 'Project Management' or 'Discount'

Producing your quote within Synergist feeds in to other key reports such as Work in Progress and New Business forecasting as well as comparing quoted values to invoiced values.

Some of the methods outlined above could help you, as a Super User, to review how Quotes are produced within Synergist.

Please contact The Agency Works at clientservices@taw.co.uk or call us on 01455 553246 if you wish to discuss further improving your quotations within Synergist.