Synergist Spotlight on…

Estimate Tab

The estimate tab is a key tab of information within Synergist as EVERY cost that is recorded against a job is visible within this tab.

An estimate within Synergist shows the internal budget. As a job progresses then actual costs e.g. timesheets & purchases are also visible. Larger jobs with many phases and many costs will show long lists of costs that can be difficult to view.

Try creating a more useful Company view and a selection of dashboard views that are more useful.

If your estimate tab looks like the example below, then this Spotlight will be of great use to your Organisation.

Ph	Description	T	Est units	Act	Est cost	Act cost	Est charge	Act charge	Est profit	staff	C
001	Head of Design	S	5.00	5.00	200.00	200.00	600.00	600.00	400.00	1/JDP	
002	Head of Design	S	3.00	2.00	120.00	80.00	360.00	240.00	240.00	1/JDP	
001	Senior Designer	S	10.00		350.00		1000.00		650.00		
002	Senior Designer	S	15.00		525.00		1500.00		975.00		
001	Account Manager	S	15.00	2.00	600.00	80.00	1200.00	160.00	600.00	1/HK	
002	Account Manager	S	5.00	3.00	200.00	120.00	400.00	240.00	200.00	1/HK	
001	Designer	S	25.00	5.00	1000.00	150.00	2000.00	400.00	1000.00	1/MP	
002	Designer	S		8.00		240.00		640.00		1/MP	
001	Designer	S		6.00		150.00		480.00		1/OWEN	
002	Designer	S	40.00	5.00	1600.00	150.00	3200.00	400.00	1600.00	1/ADAM	
001	Designer	S		10.00		300.00		800.00		1/ADAM	

- No phase headings
- Line items jumbled up
- Multiple line entries for each charge code for Estimates & Actuals

Please note that you must be marked as a **'Views Administrator'** as detailed in our **Spotlight on View Settings** to be able to create a default view for your Organisation.

It is still possible to create "User Views" for yourself if you are not a **'Views Administrator'**.

1. Create a useful Default estimate tab view for your Company

- Go to the Estimate tab at job level and click on the 'query/modify view' icon within the ribbon bar.

- This will open up the Estimate view settings screen. Tick the selection as detailed below and then click on the views button in the top right hand corner.

- Select **'Save as a new view for this Company'**; enter a description for the Company View and tick the box to make this the default view for the company.

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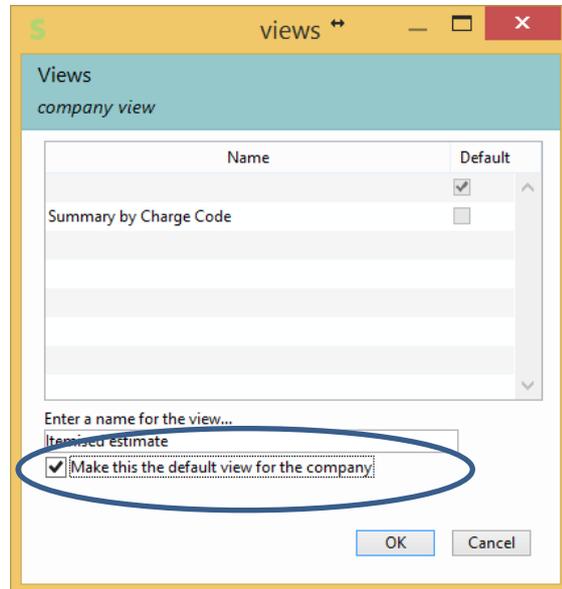
- Setting a **"Company default view"** is a once only setting and will default all users to this setting unless they already have a user default setting.

  Please Note:

  We do not recommend that you set a Default Company view that has **'rolled up'** items. Users cannot easily drill down to further detail.

2. Create other useful estimate views

Ordering estimates by phase, as above, can still show a long list of items, which can be tricky to view. Below are suggestions for alternative view settings.

- Try '**Roll up Details'** for Phase line information
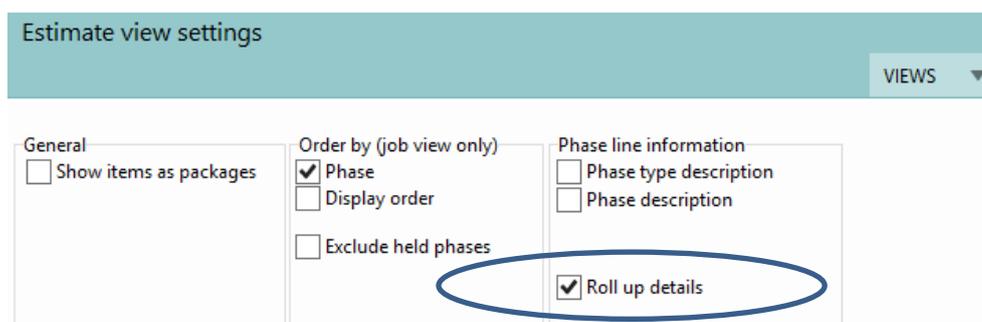
This creates a view summarized by phase.

Ph	Description	T	Est units	Act	Est cost	Act cost	Est charge	Act charge	Est profit	staff	C
001	Design	S	55.00	28.00	2150.00	880.00	4800.00	2440.00	2650.00		
002	Production	S	63.00	18.00	2445.00	590.00	5460.00	1520.00	3015.00		

- Try **'Roll up by charge codes'**

This creates a simple "**time summary view**", matching estimated hours to actual hours in a simple to understand view.

Ph	Description	T	Est units	Act	Est cost	Act cost	Est charge	Act charge	Est profit	staff	C
001 Design											
	Head of Design	S	5.00	5.00	200.00	200.00	600.00	600.00	400.00	1/JDP	
	Senior Designer	S	10.00		350.00		1000.00		650.00		
	Account Manager	S	15.00	2.00	600.00	80.00	1200.00	160.00	600.00	1/HK	
	Designer	S	25.00	21.00	1000.00	600.00	2000.00	1680.00	1000.00	1/MP	
002 Production											
	Head of Design	S	3.00	2.00	120.00	80.00	360.00	240.00	240.00	1/JDP	
	Senior Designer	S	15.00		525.00		1500.00		975.00		
	Account Manager	S	5.00	3.00	200.00	120.00	400.00	240.00	200.00	1/HK	
	Designer	S	40.00	13.00	1600.00	390.00	3200.00	1040.00	1600.00	1/MP	

- Using 2-tier job structures?

Try **summary** or roll up by **'Work Description'**.

This creates a '**summary**' view or a view with **roll up by Stage**

After creating each one of these views, remember to 'save' as a "New user View" or "Company View". ***Remember you can only have one default view.***

3. Accessing a saved view

Click on the **'Select View'** button in the ribbon bar at the top of your estimate screen to see the available view settings.
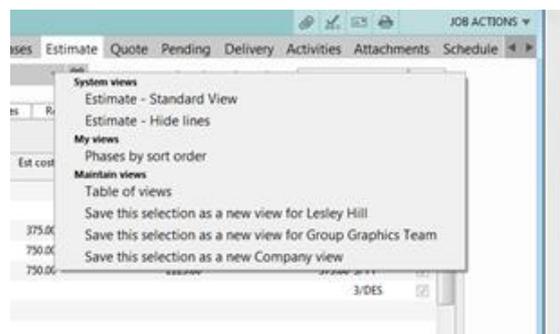
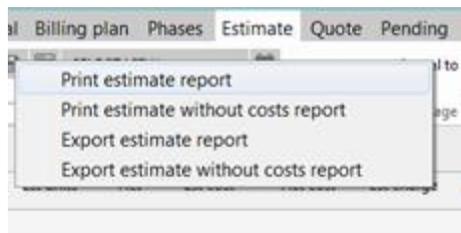You can flip between your new estimate views from here.

Your screen will always revert to your **'default view'**.

4. Creating an estimate report

- Click on the **'print'** icon in the ribbon bar the top of the estimate tab and select **'Print estimate report'** or '**Export estimate view'** from the list options**.**

EDIT ▼   ACTIONS ▼ 🖨 🗗   SELECT VIEW ▼ 📅

| Billing plan | Phases | Estimate | Quote | Pending |

- Print estimate report
- Print estimate without costs report
- Export estimate report
- Export estimate without costs report

Printed Estimate Report

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Job Number	1/00000740		**Client** 1/DULUXDC Dulux Decorator Centres
Type	Brochure		**Contact**
Order Number			**Project** Building a new desig
Handler	Nigel Unsworth		**User Field 1**
Quoted	0.00		**User Field 2**
			User Field 3
Description			**User Field 4**

A5 Brochure, 4 Page, Full Colour

Description	Type	Est Unit	Act Unit	Est Cost	Act Cost	Est Chg	Act Chg	Pick
Head of Design	S	5.00	5.00	200.00	200.00	600.00	600.00	
Head of Design	S	3.00	2.00	120.00	80.00	360.00	240.00	
Senior Designer	S	10.00		350.00		1000.00		
Senior Designer	S	15.00		525.00		1500.00		
Account Manager	S	15.00	2.00	600.00	80.00	1200.00	160.00	
Account Manager	S	5.00	3.00	200.00	120.00	400.00	240.00	
Designer	S	25.00	5.00	1000.00	150.00	2000.00	400.00	
Designer	S		8.00		240.00		640.00	
Designer	S		6.00		150.00		480.00	

Export of Estimate Report

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Phase No	Description	Type	Estimated	Actual Uni	Estimated	Actual Cos	Estimated	Estimated	Actual Cha	Estimated	Estimated	Staff	Pick
2	1	Head of D	S	5	5	200	200	120	600	600	400	600	1/JDP	
3	2	Head of D	S	3	2	120	80	120	360	240	240	360	1/JDP	
4	1	Senior Des	S	10		350		100	1000		650	1000		
5	2	Senior Des	S	15		525		100	1500		975	1500		
6	1	Account M	S	15	2	600	80	80	1200	160	600	1200	1/HK	
7	2	Account M	S	5	3	200	120	80	400	240	200	400	1/HK	
8	1	Designer	S	25	5	1000	150	80	2000	400	1000	2000	1/MP	
9	2	Designer	S		8		240	0	0	640			1/MP	
10	1	Designer	S		6		150	0	0	480			1/OWEN	
11	2	Designer	S	40	5	1600	150	80	3200	400	1600	3200	1/ADAM	
12	1	Designer	S		10		300	0	0	800			1/ADAM	

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