



ESTIMATES

Thursday

8:30 - 8:45 Intro & Overview
8:45 - 9:00 Proposals
9:00 - 9:30 Job tickets
9:30 - 9:45 Estimates
9:45 - 10:00 Change orders

Break / Office Tour

10:30 - 10:45 Traffic features
10:45 - 11:00 Production planner
11:00 - 11:30 Scheduling
11:30 - 11:45 Updating sch & traffic
11:45 - 12:30 Prod & Job reports

Lunch

1:30 - 1:45 My clients/Acct mgmt
1:45 - 2:00 Client relationship mgr
2:00 - 2:15 My calendar
2:15 - 2:30 My time card

Break

2:45 - 3:00 Time sheets
3:00 - 3:30 Billing rates
3:30 - 3:45 My expense report
3:45 - 4:00 Internal charges
4:00 - 4:15 Purchase orders
4:15 - 4:30 PO reports; Close/review

Estimates Create a job ticket estimate for a client's approval. Estimates are based only on a job ticket's estimating/billing tasks. Add up to three different estimate amounts and hours for every task, and label each estimate column with a user-defined heading, e.g., 2-color, 4-color and 6-color.

Enter budget amounts for outside costs in the Budget column. This allows you to compare the estimate (what you are charging your client) to the amount a task will cost your shop.

Add additional tasks to the estimate, specifying markup and billing rate, as needed.

Revise an estimate as many times as needed by choosing to save it as a "New Revision." A job ticket keeps each estimate revision, so it's easy to review the changes to a job's estimate at any time.

Estimate options change an estimate's looks and how it behaves, including margins, disclaimers and contingency.

- Use the pop-up estimate worksheet by clicking on its button in the Estimate window to add estimated hours for individual staff members that will be multiplied by the billing rate and/or add a budget amount that will be multiplied by the task's markup.

- To clear estimates, choose Edit > Clear Estimate Amounts.

- To copy estimate amounts from one column to the next, choose Edit > Copy Estimate Amounts.

- To print the estimate, choose File > Print Estimate.

- To edit the contingency, choose Edit > Estimate Options.

- If your client chooses one of the columns, e.g., 4-color, as the version of the job they want, indicate that choice by choosing that column from the "Final Estimate" pull-down menu in the Estimate window.

TIP 8 The Estimate vs. Billings report compares the job's estimate to total actual billings.

The **job number and name/ title** appear for reference.

The **budget** is the amount it'll cost the agency to finish the task.

The **initial budget** is the amount the client intends to spend on the job.

Use the Estimate window's **toolbar buttons** to add or remove tasks, copy amounts, and print the estimate, etc.

The **links** provide a quick way to edit the estimate worksheet, estimate options, and task description.

The job's **tasks** are sorted by group. Taxable tasks are identified with an asterisk.

Estimate										
MLI-678 / "Spring in the New Millennium" Sales Brochure					Initial Budget: \$ 21,000.00					
estimate worksheet					Show Est Rev: Original					
Task:	Description:	Budget:	Hours:	10000	Hours:	25000	Hours:	50000		
CRE	Creative Concepting		5.00	\$ 275.00	6.00	\$ 330.00	6.00	\$ 330.00		
COPY	Copywriting		7.50	\$ 712.50	7.50	\$ 712.50	7.50	\$ 712.50		
ART	Art Design		12.00	\$ 1,200.00	12.00	\$ 1,200.00	12.00	\$ 1,200.00		
* CHG	Computer Graphics	\$ 950.00		\$ 2,375.00		\$ 2,375.00		\$ 2,375.00		
* ADD	Art Direction		30.00	\$ 3,000.00	30.00	\$ 3,000.00	30.00	\$ 3,000.00		
* CTP	Typesetting	\$ 500.00		\$ 950.00		\$ 1,050.00		\$ 1,050.00		
MISC	Miscellaneous Job Costs									
PRINT	Printing	\$ 7,000.00		\$ 7,000.00		\$ 9,900.00		\$ 10,980.00		
* FILM	Lithographic Film/Pre-Press		3.50	\$ 350.00	4.50	\$ 450.00	4.50	\$ 450.00		
* PTP	Photo Processing	\$ 1,500.00		\$ 2,050.00		\$ 2,050.00		\$ 2,050.00		
				\$ 9,950.00	50.00	\$ 17,912.50	60.00	\$ 21,067.50	60.00	\$ 22,147.50

The job's previous estimates can be recalled using the **Show Est Rev** pop-up menu. The estimate's revision number appears on the printed estimate.

A job can have up to three **estimate amounts**. These amounts can show clients three different versions of an estimate.

The **Final Estimate** pop-up menu shows the names of your estimate columns, along with an options for "none" and "all" (i.e., when all estimate amounts are combined). Choosing one of the three estimates makes it final.

Each job estimate can be **approved** on-line to indicate that the client has approved the estimate. Once the client approves to the estimate, no more revisions can be made to it.

Notes

For more information on:

- Estimating -- see www.clientsandprofits.com/support/FAQs/FAQ_estimating.html
- Customizing Estimates -- see www.clientsandprofits.com/support/FAQs/FAQ_customizing_ests.html
- Estimate worksheet -- see the Job Tickets chapter of the Feature Guide (page 3-18)
- On-line Tutorial for Estimating -- see www.clientsandprofits.com/training/tutorial/LESSON3/intro.html