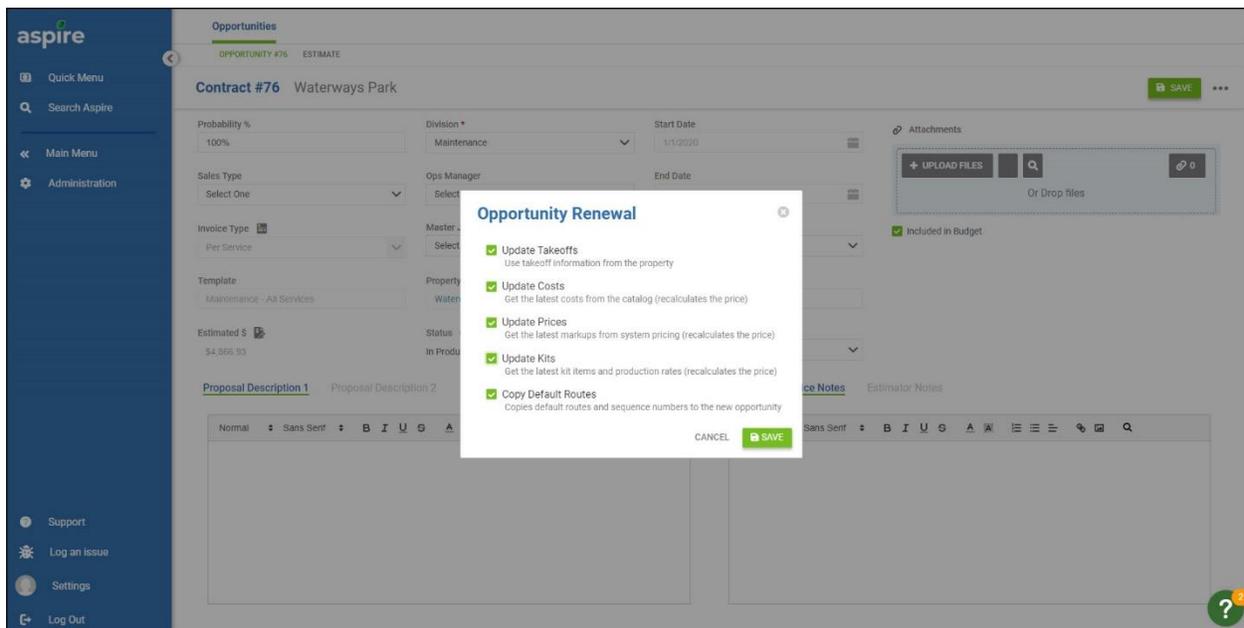


Creating Estimates from Templates - Options

When initiating creation of a new estimate for an opportunity created from a previously saved template, by copying an existing estimate, or by initiating a renewal of a previous years estimate, Aspire displays a screen having the options shown in the image below. This document explains the check boxes available and what each will do when Aspire creates the new estimate/proposal.



When these options are not checked, Aspire creates the services and items for the estimate based on the underlying template or the opportunity that is being copied. Selecting these options has the following effects:

Use take off information from the property – When this option is checked, Aspire will search the property for takeoffs and will apply these takeoff values to the items or kits defined in the opportunity estimate. If an item or kit does not have a takeoff item assigned in the item catalog, Aspire will place a zero in the quantity field. It is important to remember this when creating a new T&M estimate from a template or when copying an estimate or renewing since the system will return zero for those fields that may have been previously filled in with values like number of hours or qty of materials. It is recommended that you only select this option when you are creating a new estimate from a template and you want the system to find the takeoff values for the first time for a proposal for the property.

Get the latest costs from the catalog (recalculates price) – When this option is checked, Aspire will update costs for items and items in kits based on values in the item catalog rather than values in the template or opportunity that is being copied. This will recalculate prices for the estimate. It is generally recommended that this option be selected since you will normally want to estimate based on current prices. If a renewal is being created or an estimate is being copied and you want the pricing to be exactly as before, do not select this option.

Get the latest markups from the system pricing (recalculates price) – When this option is checked the system will set the markups for all the services on the newly created opportunity based on the system markups defined on the Admin *Pricing Settings* screen. This has relevance in situations where the system markups have changed since the time the source opportunity was created. If you have set overrides on a service in an opportunity from which a new opportunity is being created, this option will have no effect on the markups - the override will be used for the newly created opportunity. This will recalculate prices for estimates that have been created using the copy function or when creating renewals. It is recommended that you check this option whenever creating a new estimate so that you are using the most current system markups for your estimate. If a renewal is being created or an estimate is being copied and you want the pricing to be exactly as before, uncheck this option.

Get the latest kit items and production rates (recalculates price) – When this option is checked Aspire will update items and production rates for all services of the newly created opportunity based on kits defined in the item catalog. This will recalculate prices for estimates that have been created using the copy function or when creating renewals. It is recommended that you check this option when creating a new estimate so that you are using the most current system kits for your estimate. If a renewal is being created or an estimate is being copied and you want the pricing to be exactly as before, uncheck this option.

Copies default routes and sequence numbers to new opportunity – When this option is checked Aspire will copy all default routing and sequence numbers to the new opportunity created. We only recommend this when renewing a contract or copying an opportunity for the same property.