Creating and Viewing an Estimator Note

Purpose:

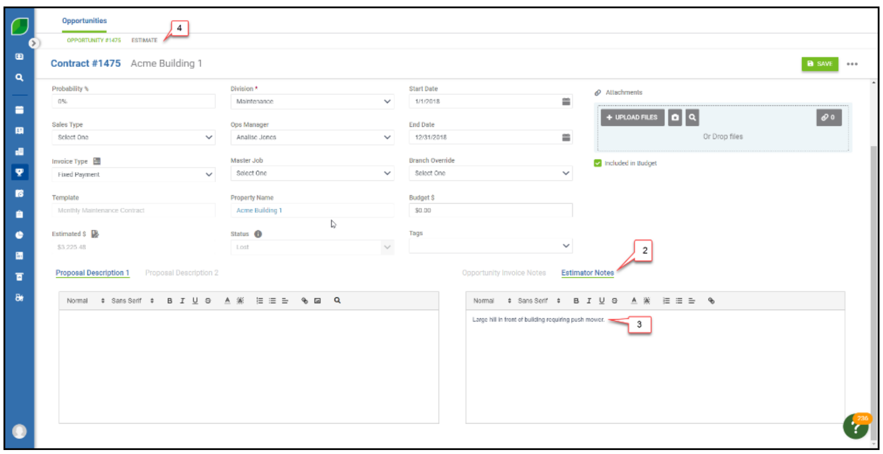
To write and view an Estimator Note. These notes are for the estimator during the sales process. These notes do not show up on the Estimate.

Prerequisites:

1. Must be able to access Opportunities and Estimates. Add Opportunity, Edit My (or All) Opportunities, View Opportunities.

Procedures:

1. Create or find the Opportunity that needs an Estimator note.



2. Click on the Estimator tab
3. Type in a Note.
4. Click on the View Estimate Tab to enter the Estimate.