

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.

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Sales Type		Maintenance	~	1/1/2018			
		Ops Manager		End Date	+ UPL0		¢
Stilect One	~	Analise Jones	~	12/31/2018	=	Or Drop files	
Invoice Type		Master Job		Branch Override	Included	in Budget	
Fixed Payment	~	Select One	~	Select One	~		
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- 2. Click on the Estimator tab
- 3. Type in a Note.
- 4. Click on the View Estimate Tab to enter the Estimate.

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