



Synergist Spotlight on...

Estimate Tab

The estimate tab is a key information area within Synergist and is often under used. Does your estimate tab look like this?

actual to estimated cost 120%

ph	description	T	est units	act units	est cost	act cost	est charge	act charge	est profit	staff	C
001	Designer	S									
001	Designer	S								1/SL	
002	Designer	S	4.00		200.00		400.00		200.00		
002	Designer	S		3.00		150.00		300.00		1/JR	
001	Account Director	S	20.00		400.00		3000.00		2600.00	1/JN	
001	Account Director	S								1/TK	
002	Account Director	S									
002	Account Director	S		1.00		50.00		150.00		1/JR	
002	Account Executive	S	2.00		200.00		400.00		200.00		
002	Account Executive	S		7.00		700.00		1400.00		1/JR	
002	Account Executive	S		4.00		400.00		800.00		1/LNN	
001	Client Services Director	S	2.00		120.00		240.00		120.00		
001	Client Services Director	S								1/	<input checked="" type="checkbox"/>
001	Client Services Director	S								1/SL	
002	Client Services Director	S	3.00		180.00		360.00		180.00		
001	Account Manager	S	5.00		165.00		500.00		335.00		

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

Why not create a useful Company view and then a selection of other dashboard views.

Please note that you must be marked as a **'Views Administrator'** as detailed in Spotlight 1 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 and click on the **'torch'** icon



- Tick the selection as detailed below and click on the views button in the top right hand corner.

estimate view settings Views

general

- show items as packages

order by (job view only)

- phase
- display order
- exclude held phases

phase line information

- phase type description
- phase description
- roll up details

time

- show time
- days
- hours
- both
- roll up charge codes
- roll up activity types
- roll up depts
- roll up staff
- roll up teams
- roll up into one
- include pending

materials

- show materials
- roll up material type
- roll up into one

purchases show...

- purchases
- expenses
- tenders
- roll up into one
- roll up supplier
- roll up supply type
- include po lines

actual cost based on

- po cost
- po/pi cost
- pi cost

un-picked

- un-picked
- picked
- un-picked for quote
- picked for quote

- Select **'Save as a new view for this Company'**, enter a description for the Company and save as the **'Default view'**.

estimate view settings Views

views

company view

name	default
Company Default	<input checked="" type="checkbox"/>

enter a name for the view...
Company Default

- make this the default view for the company



- 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.

Try **‘Roll up Details’** for Phase line information

This creates a summary by phase view:

full estimate							
time materials purchases revisions							
ph	description	T	est units	act units	est cost	act cost	est charge
001	Design	S	27.00	22.00	685.00	440.00	3740.00
002	Development	S	17.00	20.00	912.00	1550.00	2040.00
003	Printing				863.00	340.00	1035.60

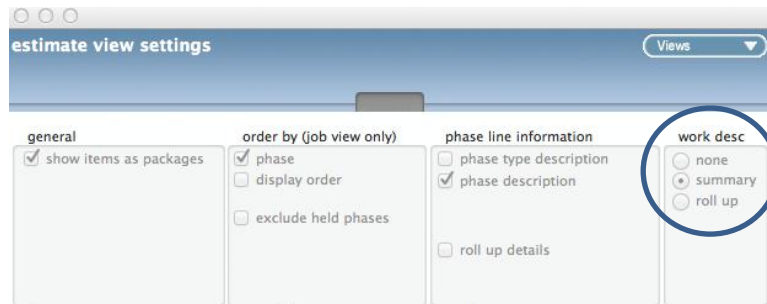
Try **‘Roll up by charge codes’**:



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

001 Design								
Designer	S							
Account Director	S	20.00		400.00		3000.00		2600.00
Client Services Director	S	2.00		120.00		240.00		120.00
Account Manager	S	5.00	22.00	165.00	440.00	500.00	2200.00	335.00
002 Development								
Designer	S	4.00	3.00	200.00	150.00	400.00	300.00	200.00
Account Director	S		1.00		50.00		150.00	
Account Executive	S	2.00	11.00	200.00	1100.00	400.00	2200.00	200.00
Client Services Director	S	3.00		180.00		360.00		180.00
Account Manager	S	4.00		132.00		400.00		268.00
Artworker	S	4.00	5.00	200.00	250.00	480.00	600.00	280.00

For 2-tier jobs try **summary or roll up by ‘Work Description’**.

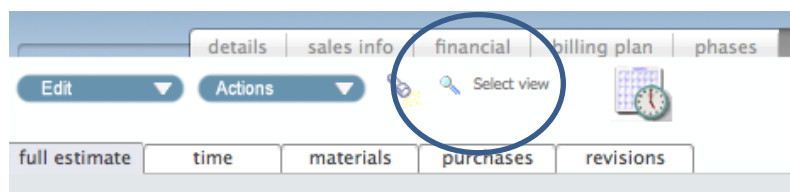


This creates a **summary or roll up by Stage**

001 Definition & Planning						
Pitching	S	150.00		5300.00	16000.00	10700.00
002 Information Architecture						
Wire Framing	S	125.00		4650.00	14000.00	9350.00
Hard Usability Testing	S	125.00		4650.00	14000.00	9350.00
Coding	S	175.00		6300.00	19000.00	12700.00
Content Development	S	150.00		5300.00	16000.00	10700.00

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

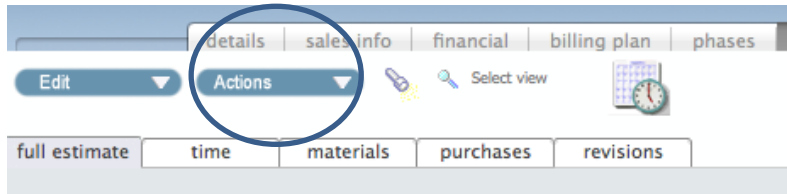




- Click on the **'Select View'** button at the top of your estimate screen in order to flip between your new estimate views. Your screen will always revert to your **'default view'**.

4. Creating an estimate report

- Click on the **'actions button'** at the top of the estimate tab and select **'Print estimate report'** or **'Export estimate view'**.



Printed Estimate Report

Description	Type	Est Unit	Act Unit	Est Cost	Act Cost	Est Chg	Act Chg	Pick
001 Design								
Designer	S							
Account Director	S	20.00		400.00		3,000.00		
Client Services Director	S	2.00		120.00		240.00		
Account Manager	S	5.00	22.00	165.00	440.00	500.00	2,200.00	
Phase Subtotals		27.00	22.00	685.00	440.00	3,740.00	2,200.00	
002 Development								
Designer	S	4.00	3.00	200.00	150.00	400.00	300.00	
Account Director	S		1.00		50.00		150.00	
Account Executive	S	2.00	11.00	200.00	1,100.00	400.00	2,200.00	
Client Services Director	S	3.00		180.00		360.00		
Account Manager	S	4.00		132.00		400.00		
Artworker	S	4.00	5.00	200.00	250.00	480.00	600.00	
Phase Subtotals		17.00	20.00	912.00	1,550.00	2,040.00	3,250.00	
003 Printing								

Export of estimate

	A	B	C	D	E	F	G	H	I	J	K	L	M	P
Phase No	Description	Type	Estimated U	Actual Units	Estimated Cc	Actual Cost	Estimated Cf	Estimated Cf	Actual Chrg	Estimated Pr	Estimated Gr	Staff		
1	Design		0	0	0	0	0	0	0	0	0	0		
	Designer	S	0	0	0	0	0	0	0	0	0	0		
	Account Dire	S	20	0	400	0	150	3000	0	2600	3000	1/JN		
	Client Servi	S	2	0	120	0	120	240	0	120	240			
	Account Mar	S	5	22	165	440	100	500	2200	335	500			
			0	0	0	0	0	0	0	0	0			
2	Development		0	0	0	0	0	0	0	0	0			
	Designer	S	4	3	200	150	100	400	300	200	400			
	Account Dire	S	0	1	0	50	0	0	150	0	0			
	Account Exe	S	2	11	200	1100	200	400	2200	200	400			
	Client Servi	S	3	0	180	0	120	360	0	180	360			
	Account Mar	S	4	0	132	0	100	400	0	268	400			
	Artworker	S	4	5	200	250	120	480	600	280	480			
			0	0	0	0	0	0	0	0	0			
			0	0	0	0	0	0	0	0	0			
			0	0	0	0	0	0	0	0	0			
	Printing	T	0	0	0	0	0	0	0	0	0			
	Printing	B	0	0	234	0	0	280.8	0	46.8	46.8			
	Printing	B	0	0	289	0	0	346.8	0	57.8	57.8			
	Printing	B	0	0	340	340	0	408	408	68	68			