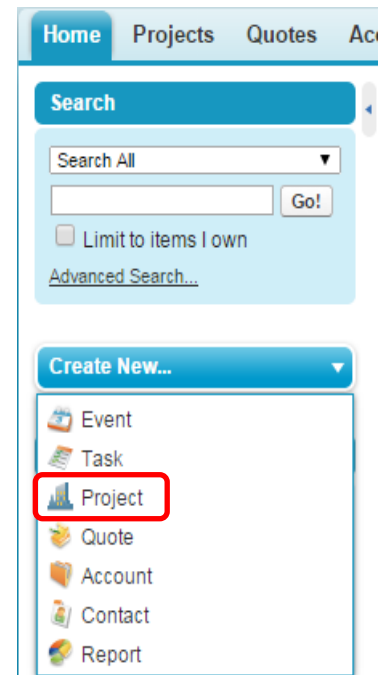
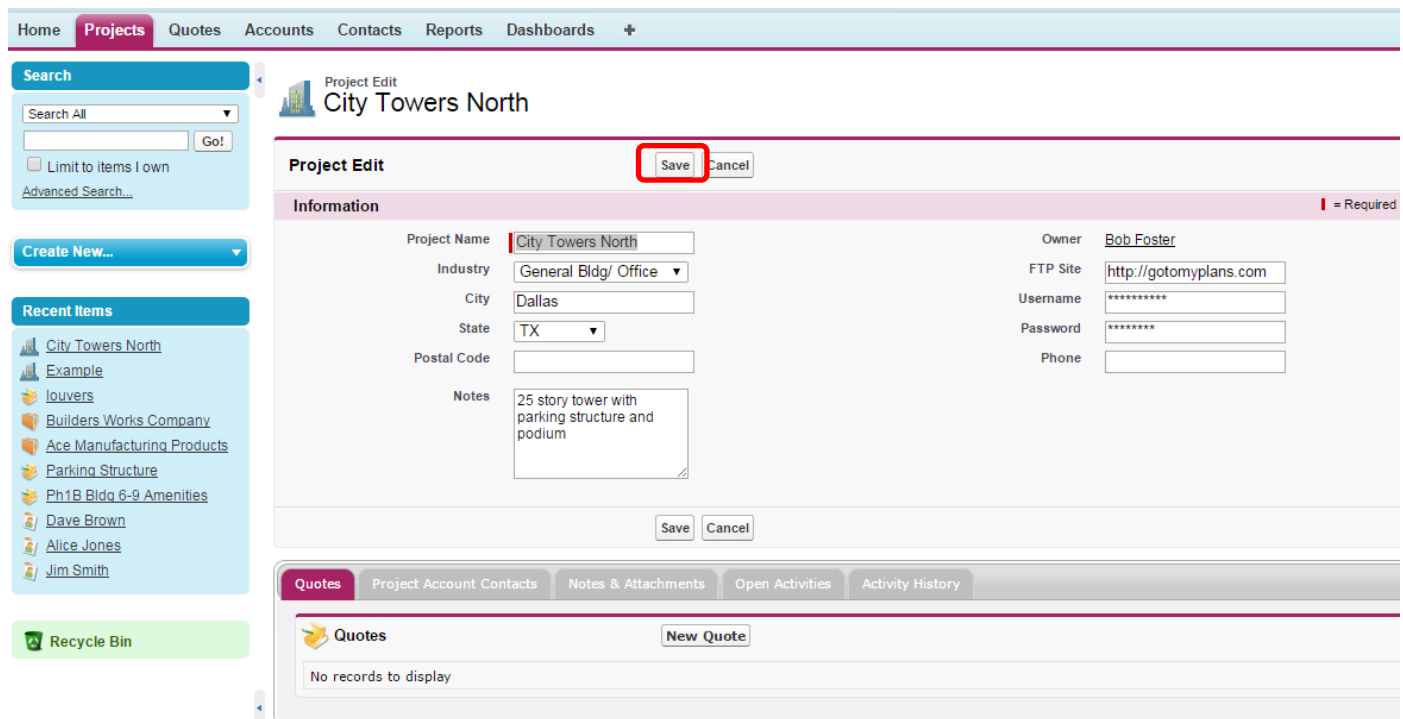


Create New Project

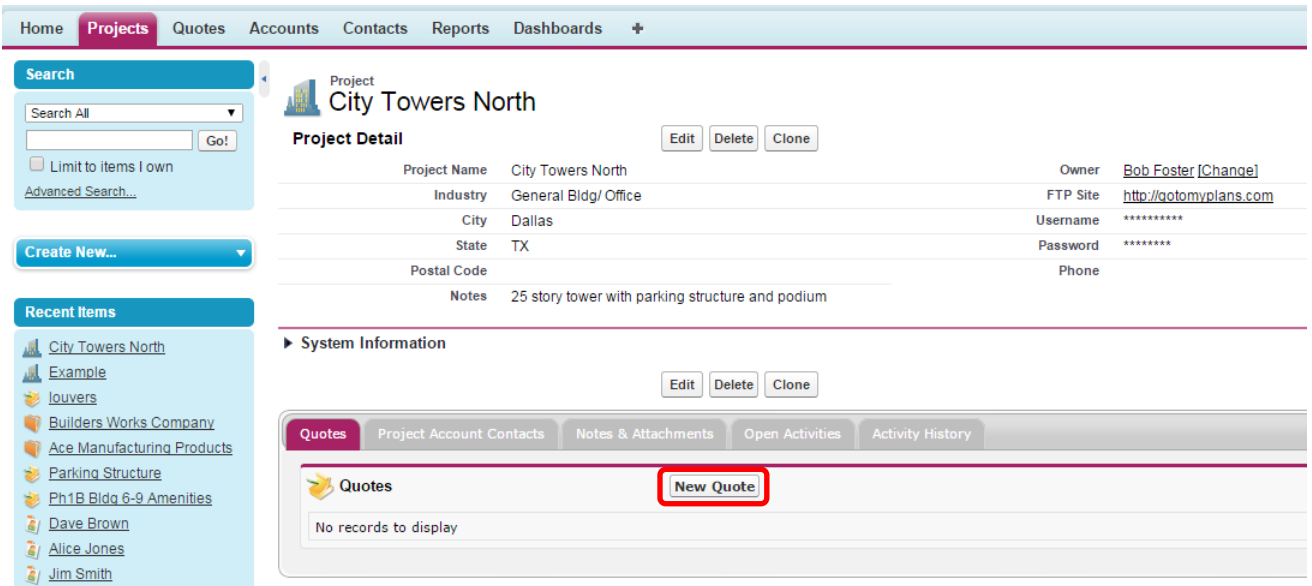
1. From the "Create New" drop down menu select "Project"



2. Enter Project information. The only required field is the "Project Name". All other fields can be completed as you gain more Information about the project. Once you have entered the information select "Save"



3. Enter the scopes of work you will be requesting quotes for by selecting "New Quote"



Project Detail

Project Name	City Towers North	Owner	Bob Foster [Change]
Industry	General Bldg/ Office	FTP Site	http://gotomyplans.com
City	Dallas	Username	*****
State	TX	Password	*****
Postal Code		Phone	
Notes	25 story tower with parking structure and podium		

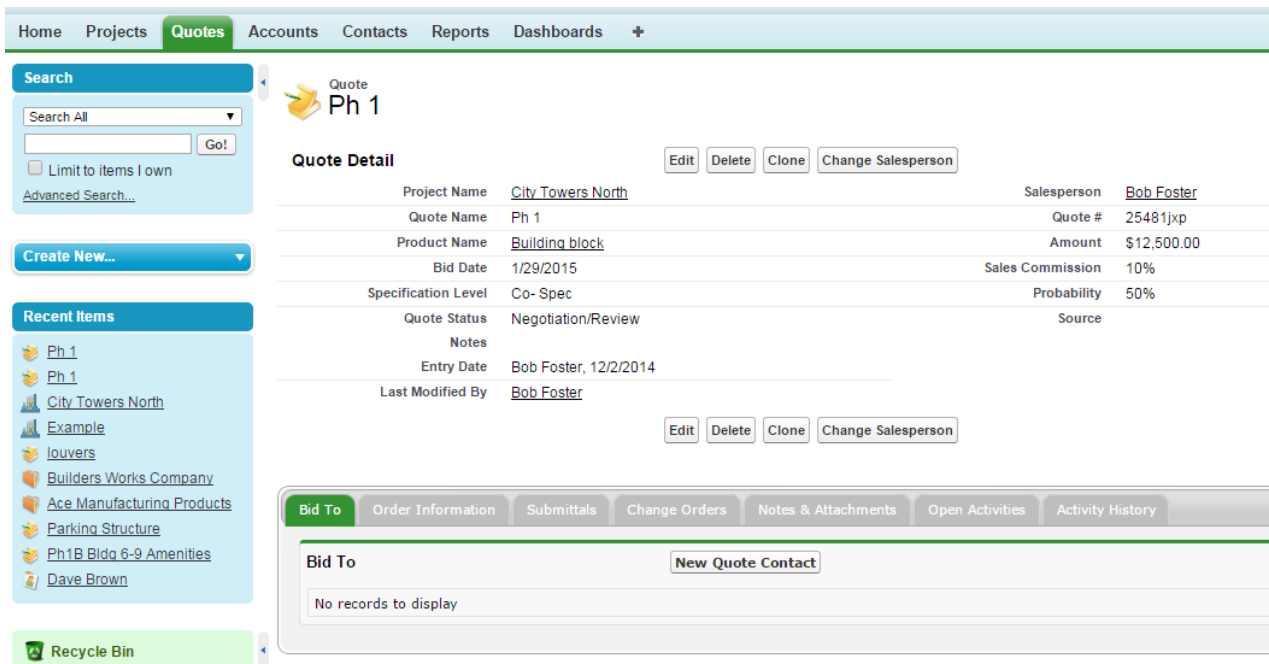
System Information

Quotes Project Account Contacts Notes & Attachments Open Activities Activity History

Quotes New Quote

No records to display

4. Enter the information about the scope of work being quoted and select "Save"



Quote Detail

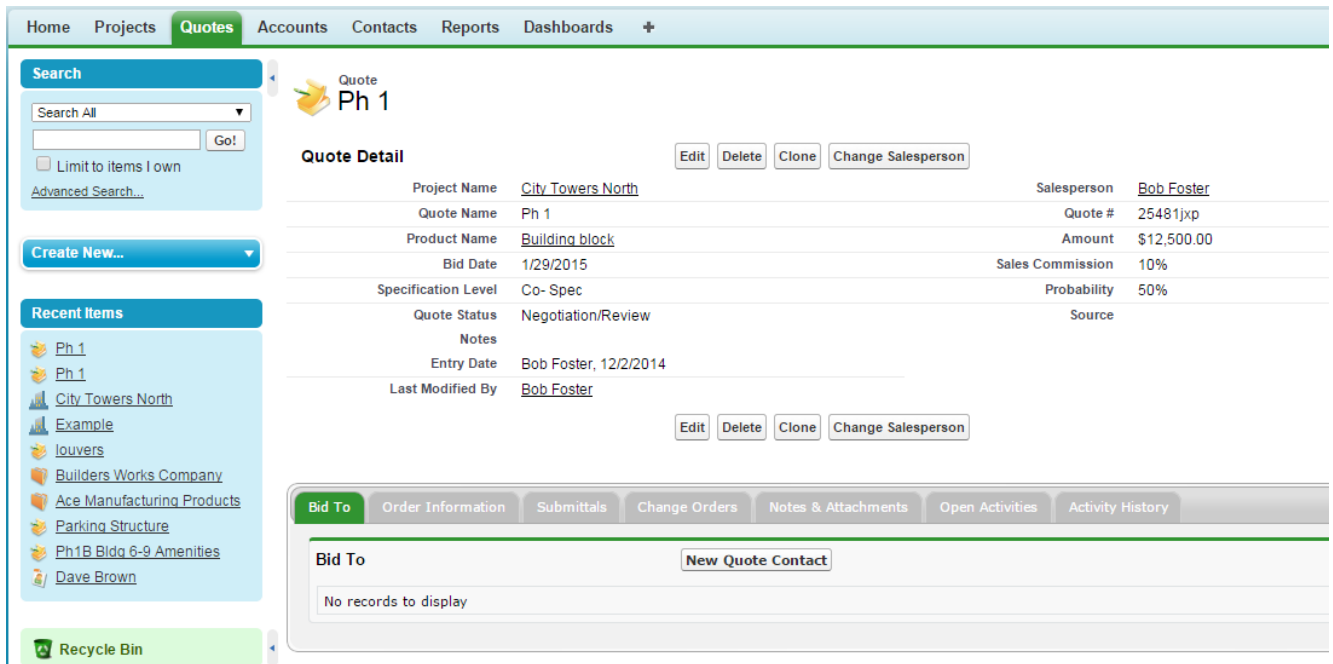
Project Name	City Towers North	Salesperson	Bob Foster
Quote Name	Ph 1	Quote #	25481xp
Product Name	Building block	Amount	\$12,500.00
Bid Date	1/29/2015	Sales Commission	10%
Specification Level	Co- Spec	Probability	50%
Quote Status	Negotiation/Review	Source	
Notes			
Entry Date	Bob Foster, 12/2/2014		
Last Modified By	Bob Foster		

Bid To Order Information Submittals Change Orders Notes & Attachments Open Activities Activity History

Bid To New Quote Contact

No records to display

5. Select the "Bid To" tab and then "New Quote Contact"

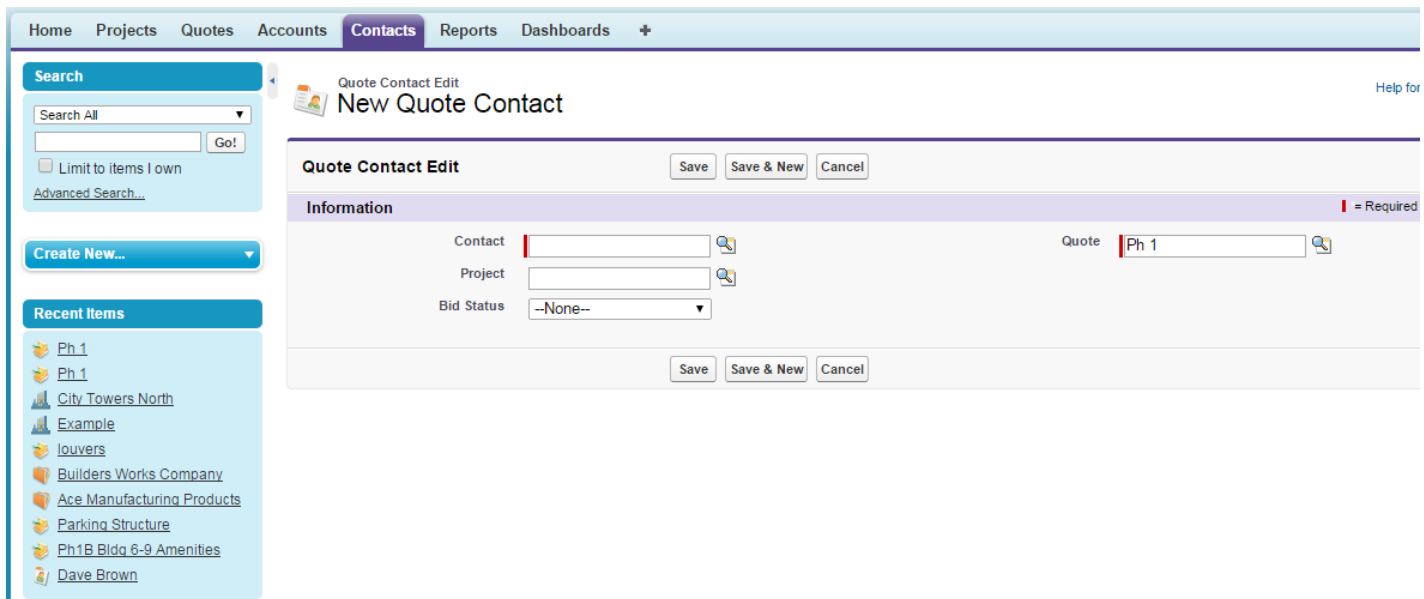


The screenshot shows the 'Quotes' section of the software. The 'Quote Ph 1' details are displayed in a table format:

Project Name	City Towers North	Salesperson	Bob Foster
Quote Name	Ph 1	Quote #	25481jxp
Product Name	Building block	Amount	\$12,500.00
Bid Date	1/29/2015	Sales Commission	10%
Specification Level	Co- Spec	Probability	50%
Quote Status	Negotiation/Review	Source	
Notes	Entry Date: Bob Foster, 12/2/2014		
Last Modified By	Bob Foster		

Below the quote details, the 'Bid To' tab is selected, showing a 'New Quote Contact' button and a message: 'No records to display'.

6. Enter the Quote Contact information and select "Save"



The screenshot shows the 'Contacts' section of the software. The 'New Quote Contact' form is displayed with the following fields:

- Contact:
- Project:
- Bid Status:
- Quote:

Buttons for 'Save', 'Save & New', and 'Cancel' are visible at the top and bottom of the form.

7. At this point you have created a project that links a manufacturer's Product to a Project to an Account and the Contact

Home Projects **Quotes** Accounts Contacts Reports Dashboards +

Search

Search All Limit to items I own [Advanced Search...](#)

Create New...

Recent Items

- Ph 1
- City Towers North
- Ph 1
- Example
- louvers
- Builders Works Company
- Ace Manufacturing Products
- Parking Structure
- Ph1B Bldg 6-9 Amenities
- Dave Brown

Quote Ph 1

Quote Detail

Project Name	City Towers North	Salesperson	Bob Foster
Quote Name	Ph 1	Quote #	25481jxp
Product Name	Building block	Amount	\$12,500.00
Bid Date	1/29/2015	Sales Commission	10%
Specification Level	Co- Spec	Probability	50%
Quote Status	Negotiation/Review	Source	
Notes			
Entry Date	Bob Foster, 12/2/2014		
Last Modified By	Bob Foster		

Bid To Order Information Submittals Change Orders Notes & Attachments Open Activities Activity History

Bid To

Action	First Name	Last Name	Account Name	Email	Phone	Type	Bid Status
<input type="button" value="Edit"/> <input type="button" value="Del"/>	Dave	Brown	Builders Works Company	bbrown@buildworksco.com	(555) 458-5896	Sub	Quoted