

EXCELSUS IQ

Complete Operating Manual

Use this as the complete end-to-end operating manual when you want one printable reference for how the suite is supposed to work.

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Excelsus IQ Complete Operating Manual

This is the complete operating manual for running a print company inside Excelsus IQ.

It combines the maintained guide sources for:

- setup
- go-live ownership
- estimator training
- production-floor operation
- reporting and intelligence

How To Use This Manual

Use this manual in three ways:

1. as the implementation reference while setting up the system
2. as the training document for estimators, managers, and floor staff
3. as the printable master manual for operating reviews and onboarding

Manual Structure

The major sections below are generated from the maintained source guides in [docs/](#).

When the source guides are updated, regenerate this manual and PDF so the combined reference stays current.

Print Shop Setup Guide

This guide is written specifically for printing companies using Excelsus IQ as their estimating, job, scheduling, purchasing, invoicing, and reporting system.

It is intentionally detailed. The goal is to give you one setup order that makes the program work the way a real print shop works.

What This System Should Be The Source Of Truth For

For a print company, this system should become the source of truth for:

- customer defaults
- estimating inputs
- production rates
- machine and finishing costs
- production sequencing
- rush and prepress charging
- order scheduling
- operator actual labor cost
- purchasing and receiving
- invoicing and reporting

If the same information is entered differently in multiple places, the system will feel inconsistent. The cleanest setup is:

1. Build the shop structure in Settings first.
2. Create clean customer records with correct defaults.
3. Quote from the catalog instead of typing ad hoc values whenever possible.
4. Convert approved quotes into orders.
5. Let scheduling and time tracking run from those orders.

Recommended Setup Order

Set the system up in this order:

1. Company settings
2. Team members and roles
3. Accounting basics
4. Catalog categories and vendors
5. Materials
6. Machines
7. Processes
8. Hardware
9. Labor rates and margin groups
10. Prepress charges
11. Rush charges
12. Production departments
13. Shop hours and resource availability
14. Operator skills
15. Job flow rules

16. Process sequences
17. Estimating defaults and volume discounts
18. Customers and contacts
19. Optional inventory
20. Purchase orders, scheduling, time, invoicing, and reports

Do not start by building quotes first. Quotes work best after customers, materials, machines, processes, prepress, rush rules, and departments are already in place.

Before You Start

Gather this information before setup:

- company legal name, display name, slug, timezone
- logo URL and primary brand color
- order, PO, and invoice prefixes
- shop working days and hours
- holiday closures
- list of departments
- list of machines with pricing model and speed
- list of finishing processes
- list of operators and their actual hourly cost
- customer tax defaults, commission rules, discounts, and quote loading rules
- material purchasing data
- margin targets
- tax rates
- overhead values
- default prepress charges
- rush policy

1. Company Settings

Go to [Settings > Company](#).

Company Info

Use [Company Info](#) to set:

- Company Name
- Company Slug
- Timezone

Recommendations for print shops:

- Use the real operating company name that should appear on documents.
- Use the timezone the production floor actually runs on.
- Do not leave timezone generic if your team, due dates, and schedule are local.

Branding And Logo

Use [Branding & Logo](#) to set:

- Logo URL
- Primary Brand Color

This matters for customer-facing documents and future white-label output. If quotes and invoices should look like your shop, set this early.

Document Numbers And Defaults

Use [Document Numbers](#) to set:

- Order Prefix
- Purchase Order Prefix
- Invoice Prefix
- Show Cost On Internal PDF
- Show Margin On Internal PDF
- Require Proof Approval Before Production
- Auto Generate Schedule On Order

Recommended starting values for most print companies:

- Order Prefix: [ORD](#) or [JOB](#)
- Purchase Order Prefix: [P0](#)
- Invoice Prefix: [INV](#)
- Show Cost On Internal PDF: on
- Show Margin On Internal PDF: on
- Require Proof Approval Before Production: on if customer proof approval is mandatory
- Auto Generate Schedule On Order: on

If your shop never wants production scheduled until someone manually reviews the job, turn off auto-generate schedule. Otherwise leave it on.

2. Team Members And Roles

Go to [Settings > Users & Access](#).

Create every real person who affects quoting, customer ownership, production, or reporting.

Available roles are:

- Owner
- Admin
- Production Scheduler / Manager
- Sales Rep
- CSR
- Sales Rep + CSR
- Operator

Actual Labor Rate Per Hour

Set [Actual Labor Rate Per Hour](#) for each person if you want time tracking and actual costing to reflect real labor cost.

This is important for print shops because:

- operators often have different actual wages
- installers may cost more than production helpers
- prepress staff may cost more than general operators

If you skip this, the system falls back to broader labor-rate assumptions instead of using person-specific actual cost.

Recommended Initial Role Mapping

Use this as a practical starting point:

SHOP ROLE	SYSTEM ROLE
Owner / GM	Owner
Office admin with broad access	Admin
Production lead or scheduler	Production Scheduler / Manager
Outside or inside sales	Sales Rep
CSR / project manager	CSR
Salesperson who also runs jobs	Sales Rep + CSR
Press operator / finisher / installer	Operator

Report Access

Turn on report permissions only for people who need them:

- Standard Reports
- Report Builder
- Accounting Reports
- Dashboards
- Invoice Reports

3. Accounting Basics

Go to [Settings > Accounting](#).

Do this before heavy quoting so tax and profitability behave correctly.

Tax Rates

Use [Tax Rates](#) to load or enter the tax rates you actually charge.

Each rate can include:

- county
- municipality
- state rate
- county rate
- city rate
- combined rate
- effective date

Best practice:

- build tax rates before customer setup
- assign the correct default tax rate on each taxable customer
- use tax-exempt only when the customer truly is exempt and the exemption number is on file

Accounting Preferences

Use [Preferences](#) to set:

- payment methods accepted

- late fee percent
- grace period
- fiscal year start month
- export format
- default income account
- default COGS account
- aging report email settings

This is mostly accounting behavior, but printing companies should still set it up early so invoices and reporting are consistent.

Overhead And Profit

Use [Overhead & Profit](#) to enter the real monthly burden of running the shop:

- rent or mortgage
- utilities
- insurance
- admin and office salaries
- sales base salaries
- management salaries
- software
- marketing
- other fixed cost
- total production floor square footage
- total shop power
- working days per month
- working hours per day
- labor burden factor
- target monthly revenue
- target gross margin
- target net profit
- unassigned overhead allocation method

For print shops, this section matters because machine cost analysis and profitability are only credible if these values are not fake.

Good starting principles:

- use realistic wages, not ideal wages
- use conservative throughput
- use actual occupancy cost
- use a labor burden factor that includes payroll burden and benefits

After overhead is set, review each major machine in its cost calculator and compare the current sell rate against the suggested rate.

4. Catalog Categories

Go to [Settings > Catalog > Categories](#).

Categories are for organizing the catalog. They are not the production department.

Use categories for reporting and catalog structure, such as:

- Materials / Vinyl
- Materials / Banner

- Materials / Rigid
- Materials / Paper
- Machines / Wide Format
- Machines / Digital Press
- Processes / Cutting
- Processes / Laminating
- Hardware / Grommets
- Hardware / Frames

Important:

- **Category** is catalog organization.
- **Production Department** is scheduling.

Do not try to use category as your job-flow department.

5. Vendors

Go to **Settings > Catalog > Vendors**.

Create vendors before materials, outsourced processes, or hardware so those records can point to the right supplier.

Recommended vendor data:

- vendor name
- account number
- terms
- primary contact
- email
- phone
- address
- notes

Typical print-shop vendors:

- media vendors
- laminate vendors
- substrate vendors
- hardware suppliers
- outsourced finishers
- freight and installation partners

6. Materials

Go to **Settings > Catalog > Materials**.

Materials represent the physical stock you buy and consume.

The system supports two stock types:

- **Sheet**
- **Roll**

Laminates are usually created as **Roll** materials, not as a separate stock type.

What To Create As Materials

Common examples:

- adhesive vinyl rolls
- banner rolls
- canvas rolls
- poster paper rolls
- foam board sheets
- coroplast sheets
- ACM sheets
- styrene sheets
- magnetic material
- laminate rolls

Key Material Fields

Set these carefully:

- Category
- Name
- SKU
- Vendor
- Stock Type
- Sheet Width, Height, Cost for sheet stock
- Roll Width, Length, Cost for roll stock
- Unit Of Measure
- Waste Factor %
- Bleed
- Gutter
- Trim Margin
- Weight Per Sq Ft
- Color
- Finish
- Thickness
- Notes

How Print Shops Should Think About Material Setup

For wide-format shops:

- create separate materials for each common roll width and finish
- do not combine different widths into one record
- create separate laminate material records by finish and width
- use realistic waste, especially for short-run jobs

For sheetfed shops:

- create each sheet size separately
- create separate coated, uncoated, synthetic, and specialty stocks
- use actual sheet cost, not carton cost unless you convert it

For rigid-media shops:

- create each substrate thickness and size separately
- do not combine 3 mm and 6 mm board in one material

Inventory Note

If you plan to use the Inventory module, mark materials for inventory tracking and maintain accurate receipts and adjustments. If you do not track stock, you can still use materials for quoting only.

7. Machines

Go to [Settings > Catalog > Machines](#).

Machines are the main production-cost engine for print shops. Build these carefully.

Machine Setup Should Include

- Category
- Production Department
- Name
- Machine Code
- Active flag
- Pricing Model
- Rate Per Hour, Per Click, Per Sq Ft, Minimum Charge, or other pricing inputs
- Setup Time
- Max Print Width
- Max Print Length
- Speed in the throughput unit that makes sense
- Requires Operator
- Operator Rate Per Hour
- Notes

Category Versus Department

Use them differently:

- [Category](#) : how the machine is grouped in the catalog
- [Production Department](#) : where the machine belongs in scheduling

Example:

- Category: [Wide Format Printers](#)
- Department: [Printing](#)

Choosing A Pricing Model

Use the pricing model that matches how you actually sell and estimate:

- [hourly](#) for machines quoted by time
- [click](#) for click-based devices
- [sqft](#) for square-foot pricing
- [per_piece](#) for equipment where per-piece logic makes more sense
- [flat](#) for flat setup-style charges
- [lnft](#) when linear-foot pricing is the right basis

Choosing A Speed Unit

Use the speed field that matches how the machine actually runs:

- [Speed \(sq ft/hr\)](#) for many printers, routers, laminators, and broad-area finishing equipment
- [Speed \(linear ft/hr\)](#) for roll workflows where length is the better driver
- [Speed \(pieces/hr\)](#) for cutters, folders, pack-out stations, or any piece-based step

If a printer is charged hourly and output is really based on square feet, do not force [pieces/hr](#). Use [sq ft/hr](#).

Good Machine Examples

Wide-format printer:

- Department: Printing
- Pricing model: hourly or sqft
- Speed: sq ft/hr
- Requires operator: yes

Roll laminator:

- Department: Laminating
- Pricing model: hourly or lnft
- Speed: linear ft/hr or sq ft/hr

Flatbed cutter:

- Department: Cutting
- Pricing model: hourly or per_piece
- Speed: pieces/hr or sq ft/hr depending on how you sell it

Pack-out bench:

- Department: Packing
- Pricing model: hourly
- Speed: pieces/hr

Machine Cost Calculator

For each major machine, open the cost calculator and fill in:

- purchase price
- salvage value
- useful life
- maintenance
- equipment insurance
- machine footprint
- power draw
- utility rate
- voltage

This helps determine whether your machine sell rate is actually covering burden.

8. Processes

Go to [Settings > Catalog > Processes](#).

Processes are non-material production charges and production steps.

Common print-shop processes:

- lamination
- mounting
- contour cutting
- trimming
- sewing
- hemming
- grommets
- drilling
- weeding
- transfer tape
- kitting
- packing
- shipping prep
- installation
- design
- file repair
- press proof

Key Process Setup Fields

- Category
- Production Department
- Name
- Process Code
- Pricing Model
- Rate
- Setup Charge
- Minimum Charge
- Time Per Unit
- Is Outsourced
- Vendor
- Outsource Cost
- Notes

Department Assignment Matters

If you want auto-scheduling to run by department order instead of by machine-specific logic, assign every machine and every schedule-relevant process to a production department.

Examples:

- contour cut process -> Cutting
- laminate process -> Laminating
- hand apply tape -> Handwork
- kitting process -> Kitpacking
- boxing process -> Packing
- delivery staging -> Shipping

Outsourced Processes

Use **Is Outsourced** for work such as:

- trade bindery
- outsourced installs
- specialty finishing
- embroidery
- outsourced die cutting

If it is outsourced, set the vendor and outsource cost.

9. Hardware

Go to **Settings > Catalog > Hardware**.

Use hardware for non-stock accessories or attachable billable components such as:

- grommets
- standoffs
- easel backs
- frames
- hooks
- pole pockets if priced as an add-on piece
- cable kits
- mounting brackets
- zip ties if you bill them

Set:

- category
- name
- vendor
- unit of measure
- cost per unit
- optional sell price per unit
- minimum quantity

10. Labor Rates

Go to **Settings > Catalog > Labor Rates**.

Use this for role-level labor assumptions and defaults.

Examples:

- Prepress Artist
- Press Operator
- Finishing Operator
- Installer
- CSR

Then, for higher accuracy on actual time cost, also set **Actual Labor Rate Per Hour** on each user record.

The clean model is:

- labor rate table = shop-level standard assumptions

- user labor rate = person-specific actual cost

11. Margin Groups

Go to [Settings > Catalog > Margin Groups](#).

Create margin groups that reflect how your shop prices different work.

Example structure:

MARGIN GROUP	USE FOR
Standard	Normal retail work
Premium	Rush, specialty, complex work
Wholesale	Trade customers and resellers
Custom	Special-account pricing

Each margin group should have:

- margin percent
- minimum dollar margin
- description

These can then be assigned to customers and used as the base estimating posture.

12. Prepress Charges

Go to [Settings > Catalog > Prepress Charges](#).

This is where you build reusable quote-time prepress options.

Recommended Core Prepress Types

At minimum, most print shops should create:

1. [Standard Prepress](#)
2. [File Prep](#)

Recommended setup:

- [Standard Prepress](#)
- pricing model: [flat](#)
- auto apply to each item: on
- show separately on quote: based on your preference
- [File Prep](#)
- pricing model: [per_version](#)
- auto apply to each item: on
- show separately on quote: based on your preference

How it works in the quote builder:

- standard prepress applies once per quote item
- file prep multiplies by the number of versions or files on that item

You can also create optional prepress types for:

- color correction

- variable data setup
- straight reprint
- reprint with change
- CNC file setup
- proof creation
- design time

Best Practice

Make the default automatic charges represent what truly happens on almost every job.

Do not auto-apply rare charges. Only auto-apply the baseline shop behavior.

13. Rush Charges

Go to [Settings > Catalog > Rush Charges](#).

Rush rules are order-level or quote-level urgency charges.

Each rush rule has:

- name
- description
- percent charge
- minimum charge
- sort order
- active flag

The rule uses whichever dollar value is higher:

- the percentage-based rush amount
- the minimum rush charge

Example rush policy:

RULE	PERCENT	MINIMUM
Same Week Rush	10%	\$150
48 Hour Rush	20%	\$300
Next Day Rush	35%	\$500

If your rush policy depends on promise date, create the few standard rules you actually sell instead of making every quote unique.

14. Production Departments

Go to [Settings > Production > Departments](#).

Departments are now the right place to define production flow at a print-shop level.

This is where you set the departments the scheduler should sequence through.

Recommended department list for many print shops:

- Printing
- Cutting
- Laminating
- Mounting

- Sewing
- Finishing
- Handwork
- Kitpacking
- Packing
- Shipping
- Installation

Set **Sort Order** in the order you want work to generally progress.

Example:

SORT ORDER	DEPARTMENT
10	Printing
20	Laminating
30	Cutting
40	Mounting
50	Finishing
60	Handwork
70	Kitpacking
80	Packing
90	Shipping

Important:

- categories organize records
- departments drive production flow

15. Shop Hours

Go to **Settings > Production > Shop Hours**.

Set:

- shop open time
- shop close time
- working days

Then add closures for:

- holidays
- planned downtime
- maintenance windows
- plant shutdowns
- resource-specific blackout dates

If your shop runs a real second shift but the system is only set to daytime hours, scheduling will look wrong. Set hours to match reality.

16. Production Resource Schedule

Go to [Settings > Production > Production Resource Schedule](#).

Use this to override default availability for:

- machines
- schedule-relevant processes

This is where you reflect that a specific cutter, laminator, or process is only available on certain days or times.

Examples:

- install crew only available Monday through Friday
- second cutter only runs during first shift
- outsourced process unavailable on weekends

17. Schedule Settings

Go to [Settings > Production > Schedule Settings](#).

Set:

- auto-schedule new orders when converted from quote
- auto-assign primary operator when scheduling
- respect operator skill level
- default view
- start hour
- end hour
- time slot size
- show completed tasks
- task overrun alert minutes
- warn if unscheduled days before due

Recommended starting settings:

- auto-schedule on: on
- auto-assign primary operator: on if your operator assignments are maintained
- respect operator skill level: on
- slot size: 15 or 30 minutes depending on shop complexity

18. Operator Skills

Go to [Settings > Production > Operator Skills](#).

Assign operators to the machines they can run and set:

- skill level
- whether they are a primary operator

This matters if you want scheduling to assign the right person to the right equipment instead of treating every operator as interchangeable.

For example:

- Operator A: primary on flatbed printer
- Operator B: primary on roll printer
- Operator C: skilled on Zund, backup on laminator

19. Job Flow Rules

Go to [Settings > Production > Job Flow Rules](#) .

This is where you define the default production sequence.

Rules can sequence by:

- department
- machine type
- process category

For most print companies, department-based rules are the cleanest setup.

Example rule for a wide-format shop:

1. Printing
2. Laminating
3. Cutting
4. Handwork
5. Packing
6. Shipping

Example rule for rigid board work:

1. Printing
2. Mounting
3. Cutting
4. Finishing
5. Packing
6. Shipping

Best practice:

- use department steps for most of the flow
- only use machine-type or process-category steps when you truly need more specific logic

20. Process Sequences

Go to [Settings > Production > Process Sequences](#) .

Use process sequences when a specific kind of item needs a special flow that differs from the default rule.

Sequence templates can step by:

- department
- machine type
- exact process

Use this for recurring special workflows, such as:

- print -> laminate -> contour cut -> weed -> transfer tape -> pack
- print -> mount -> trim -> crate
- prepress -> proof -> print -> install

Do not overbuild this area at the start. Create the common default first, then add templates only for recurring exceptions.

21. Job Statuses

Go to [Settings > Production > Job Statuses](#) .

Set the shop language you want your team to use for orders and production states.

Keep statuses simple and operationally clear. Too many statuses usually create confusion instead of control.

22. Estimating Defaults

Go to [Settings > Estimating > Default Values](#).

This page controls the quoting posture the system assumes when estimators start a new quote.

Set:

- Bleed
- Gutter
- Trim Margin
- Waste Factor
- Quote Valid For
- Default Margin Group
- Quote Loading %
- Auto-calculate imposition
- Show material cost breakdown in quote builder
- Show machine time in quote builder
- Warn when margin falls below minimum
- Require a machine selection on every quote line

Recommended starting point for many print shops:

- set bleed, gutter, and trim to your common production assumptions
- set waste to a realistic shop average, not a best-case guess
- set quote validity to what sales actually promises
- leave warning below margin on
- require machine selection if you want disciplined estimating

23. Volume Discounts

Go to [Settings > Estimating > Volume Discounts](#).

Use volume discounts when your shop systematically discounts by:

- quantity
- square footage
- a specific customer
- a specific material or process context

Only build structured discounts you actually intend sales to follow. If everything is custom, this area becomes noise.

24. Customer Setup

Go to [Customers > New Customer](#).

Customer setup is critical because quotes and orders inherit customer defaults.

What Quotes And Orders Pull From The Customer

The system uses the customer as the source of truth for:

- sales rep
- CSR

- default customer contact
- tax rate
- tax exempt status
- margin group
- commission percent
- automatic discount percent
- quote loading percent
- volume discount rule

If those values are wrong on the customer, your quotes and orders will start wrong.

Customer Record Best Practice

Set the following:

- Company Name
- Account Status
- Account Code
- Category
- Website
- Billing address
- Shipping address
- Sales Rep
- CSR
- Credit Terms
- Credit Limit
- Default Currency
- Default Sales Tax Rate
- Tax Exempt and exemption number if applicable
- Requires PO Number if the customer needs it
- Invoice and statement delivery rules
- Filing number if you use it
- Margin Group
- Margin %
- Minimum Margin \$
- Commission %
- Automatic Discount %
- Quote Loading %
- Volume Discount Rule if applicable
- Notes

Contacts

After creating the customer, add customer contacts and make sure one is the default contact.

That default contact is what quote and order headers will use.

If you skip contacts, the quote can still exist, but the communication side of the record will be incomplete.

Practical Customer Types

Retail customer:

- standard or premium margin
- normal tax rule
- no automatic discount unless intentional

Trade reseller:

- wholesale margin group
- maybe no sales rep commission
- maybe automatic discount

Large corporate account:

- default CSR assigned
- requires PO number
- statement delivery configured
- agreed quote loading or account-specific discount if applicable

25. Creating Quotes The Right Way

Go to [Quotes > New Quote](#).

Header Setup

At the top of the quote:

- choose the customer first
- confirm the correct default contact appears
- confirm the inherited sales rep and CSR
- fill in [Job Name](#)

[Job Name](#) is the overall quote name. It should describe the entire job, even if the quote has multiple items.

Examples:

- Spring Window Campaign
- Trade Show Booth Package
- Fleet Graphics Rollout
- Restaurant Menu Reprint

Line Item Setup

Each quote line is an item within the overall job.

Use:

- [Item Description](#) for what that specific item is
- printing selection
- size
- quantity and versions breakdown rows

The system totals quantity from the quantity/version rows. Build those carefully.

Examples:

- 500 qty x 2 versions = 1,000 total units
- 5 signs x 4 files = 20 total units

Prepress In Quotes

If prepress types are set to auto-apply:

- standard prepress is applied once per item
- file prep is multiplied by versions or files

This is the correct behavior for many print shops and should be part of the default quote build if that reflects your real operation.

Materials, Machines, Processes, And Hardware

Use the catalog records you created earlier:

- material for stock
- machine for production charge
- processes for finishing, outsourced work, or production steps
- hardware for billable accessories

Try not to estimate with one-off numbers when a reusable catalog record should exist.

Rush In Quotes

If a rush rule applies, select the correct rush option so the quote reflects the urgency premium.

26. Converting Quotes To Orders

When a quote is approved:

1. convert it to an order
2. confirm the order due date
3. confirm the shipping plan
4. confirm the production sequence

If **Auto Generate Schedule On Order** is on, the schedule should build automatically from the order.

27. How Scheduling Should Work For A Print Shop

The clean intended flow is:

1. quote line uses machine and process choices
2. those records are assigned to production departments
3. job flow rules sequence the departments
4. the schedule creates tasks in department order
5. operator skills and availability influence assignment
6. operators clock time against those tasks

To make this work well:

- every important machine should have a department
- every schedule-relevant process should have a department
- shop hours must be real
- machine and process availability must be maintained
- primary operators should be assigned

If you leave department blank everywhere, scheduling falls back to older machine-type and process-category behavior. That can work, but department-based setup is the better shop-wide model.

28. Time Tracking And Actuals

Go to [Time](#) .

Operators can clock into scheduled tasks and clock out when they complete or pause work.

This is how the system captures:

- actual time
- actual labor cost
- actual task progress

For good actuals:

- make sure operators are assigned correctly
- make sure each operator has the right user role
- set actual labor rate on each operator if you want true labor cost

This is especially useful for:

- finding underquoted steps
- proving a department bottleneck
- checking whether setup assumptions are wrong

29. Inventory

Use the Inventory module only if you want stock-on-hand tracking.

Inventory becomes useful when you:

- buy common media in volume
- receive stock against POs
- want low-stock alerts
- want on-hand visibility by material

Inventory includes:

- dashboard
- tracked materials
- material detail
- manual adjustments
- low-stock and out-of-stock alerts

If your shop does not want perpetual inventory, you can ignore this module and still use materials for estimating.

30. Purchase Orders

Go to [Purchase Orders](#) .

Use POs when you need to buy:

- materials
- hardware
- outsourced production

POs can be linked to jobs and order lines, and received quantities can feed inventory and job costing.

Good use cases:

- special substrate for one customer job
- outsourced install

- trade bindery work
- custom hardware package

31. Invoices And Accounting Flow

After production and shipment:

1. create invoice from the order
2. confirm taxes and totals
3. send using the customer's delivery rules
4. record payment

Make sure:

- customer tax status is correct before quoting
- invoice prefix is set
- payment methods are configured

32. Reports

Use [Reports](#) after the operational setup is clean.

The report builder supports datasets for:

- jobs and orders
- invoices
- payments
- customers
- quotes
- purchase orders
- vendors

Practical reports for print companies:

- quotes won vs lost
- orders due this week
- revenue by customer
- balance due by customer
- purchases by vendor
- tax-exempt customers
- sales rep activity

For dashboard interpretation, quote intelligence, report-builder usage, and how to act on reporting data, use the separate [Reporting And Intelligence Guide](#) as the operating reference.

33. Recommended Department Model For Common Print Shops

Wide-Format Sign Shop

Recommended departments:

1. Prepress
2. Printing
3. Laminating
4. Cutting

5. Mounting
6. Finishing
7. Packing
8. Shipping
9. Installation

Digital Print And Copy Shop

Recommended departments:

1. Prepress
2. Digital Printing
3. Cutting
4. Folding
5. Binding
6. Packing
7. Shipping

Trade Show / Display Shop

Recommended departments:

1. Prepress
2. Printing
3. Laminating
4. Cutting
5. Sewing
6. Assembly
7. Kitpacking
8. Packing
9. Shipping
10. Installation

34. Recommended First Pass Setup For A Typical Wide-Format Shop

If you want a practical first-pass setup instead of perfect data, do this:

1. Set company info, branding, prefixes, and auto-schedule on order.
2. Add all employees and put actual labor cost on managers, prepress, operators, and installers.
3. Add tax rates.
4. Add vendors.
5. Add your top 20 materials only.
6. Add your main printer, laminator, cutter, and pack-out area.
7. Add the core processes you sell every week.
8. Add **Standard Prepress** and **File Prep**.
9. Add 3 rush rules.
10. Add departments.
11. Build one clean default job flow rule.
12. Set shop hours and closures.
13. Add operator skills.
14. Add your margin groups.

15. Set estimating defaults and overhead.
16. Add your top customers and contacts.
17. Build test quotes and one full test order.

That is enough to go live without overengineering phase one.

35. Common Setup Mistakes

Avoid these:

- using category instead of department for scheduling
- not assigning default customer contacts
- leaving customer tax and commission defaults blank
- creating materials without real dimensions and cost
- using unrealistic machine speeds
- forgetting machine departments
- forgetting process departments
- not creating a default job flow rule
- putting rare prepress charges on auto-apply
- skipping operator skills but expecting smart scheduling
- skipping overhead but expecting reliable profitability
- treating every exception as a permanent catalog record

36. Go-Live Checklist

Before your team starts using the system for real jobs, confirm all of this:

- company info is correct
- branding is correct
- numbering prefixes are correct
- tax rates are loaded
- overhead is entered
- payment preferences are entered
- all active staff are created
- operator labor rates are set
- main vendors are loaded
- key materials are loaded
- main machines are loaded
- key processes are loaded
- standard hardware is loaded
- margin groups exist
- prepress charges exist
- rush rules exist
- departments exist
- shop hours are correct
- closures are entered
- operator skills are entered
- at least one default job flow rule exists
- customers are loaded

- contacts are loaded and default contacts are set
- one full test quote has been created
- one quote has been converted to an order
- schedule generation has been tested
- one time entry has been clocked
- one PO has been created and received if using purchasing
- one invoice has been created
- one report has been reviewed

37. Best-Practice Operating Rules

Once you are live, keep these rules:

1. Customer defaults are maintained by sales or CSR ownership.
2. New materials, machines, processes, and hardware are added to the catalog before estimators improvise them repeatedly.
3. Department assignments are mandatory on new machines and schedule-relevant processes.
4. New recurring rush or prepress behavior is configured once in Settings instead of manually recreated on every quote.
5. Operators clock into real tasks instead of using generic time buckets whenever possible.
6. The shop reviews actuals against estimates every month and adjusts speeds, setup times, or rates when needed.

38. If You Want The Simplest Mental Model

For a print company, think of the system like this:

- Customers define who you are selling to and what defaults apply.
- Catalog defines what you can sell and how it costs.
- Estimating defines the default quoting logic.
- Production defines how work flows through the shop.
- Quotes define what the customer is being offered.
- Orders define what the shop is actually making.
- Time, purchasing, inventory, and invoicing define what actually happened.
- Reports tell you whether the business is working.

If you keep each area clean and do not mix responsibilities between them, the system will stay understandable as the shop grows.

39. Recent Platform Additions

The system has expanded materially since the earlier manual sections were written. The most important additions are below.

Production Library And Product Catalog

Catalog is now presented as **Production Library**.

This area now covers:

- materials
- laminate
- hardware
- machines
- processes
- import center
- product catalog templates

The **Product Catalog** is for prebuilt sellable products. A product template can now:

- prefill material, machine, process, hardware, and sizing assumptions
- support customer-optional or customer-locked usage
- support calculated pricing, fixed total pricing, or fixed unit pricing
- launch directly into quote or order entry

Use this when the shop sells repeatable items such as standard banners, posters, yard signs, kits, or recurring programs.

Inventory Control

Inventory now supports:

- on-hand quantity by material
- manual adjustments
- PO receiving into stock
- job allocations / reservations
- actual material usage capture
- spoilage / overrun capture
- cycle counts
- valuation reporting

The main daily planning report for materials is:

- **Inventory > Daily Requirements**
- direct route: **/inventory/requirements**

That report shows, per job and component:

- job number
- customer
- due date
- component type
- material / laminate / hardware
- quantity needed
- job allocated quantity
- inventory reserved quantity
- current on-hand quantity
- current available quantity

Use this report every day for purchasing, staging, and production planning.

AI Platform

There is now a reusable AI layer with:

- provider and model settings
- prompt templates
- request / response logging
- structured JSON validation
- retries and fallback behavior
- human review queue
- feature-by-feature enable / disable controls

Current AI consumers include:

- natural-language quote intake
- win probability explanations
- promise date reasoning

AI setup lives in:

- [Settings > AI > Infrastructure](#)
- [Settings > AI > Prompt Templates](#)
- [Settings > AI > Review Queue](#)

Predictive Promise Date

Promise dates are no longer only manual commitments.

The system now supports:

- optimistic date
- recommended date
- high-risk date
- capacity-based reasoning
- risk level
- manager override notes when committing earlier than recommended

Related settings live in:

- [Settings > Production > Schedule Settings](#)

Dashboard And Production Meeting

The main dashboard is now a live operations command center.

It includes:

- KPI health strip
- production war board
- bottleneck / risk panel
- financial pulse
- fast links to due-today, due-tomorrow, all-orders, and production meeting

The daily review screen is:

- [Production Meeting](#)
- direct route: </production-meeting>

Use that screen at the 9:00 AM meeting to review all work due today and tomorrow.

Customer Portal

The customer portal now supports:

- live order stage tracking
- milestone timeline
- customer file upload
- reorder requests

Portal admin settings live in:

- [Settings > Customer Portal](#)

Accounting Sync

Accounting integrations now have a dedicated framework for:

- QuickBooks Online
- Xero
- customer sync
- invoice sync
- payment sync
- invoice status sync
- reconciliation and conflict review

Settings live in:

- [Settings > Accounting > Integrations](#)

Treat accounting sync as a controlled rollout until sandbox testing is complete.

40. Current System Setup Requirements

The sections above still describe the core shop setup sequence. The items below are the current platform requirements that must also be configured if you want the whole system to behave the way the code now supports.

Staff Login And Access

For production or owner use on the real deployed system, staff access should be configured through:

- [Settings > Team Members](#)

Important rules:

- the owner should have an active username and password
- the owner should confirm the organization workspace slug before first staff login
- all real staff logins should be assigned to named users instead of sharing one login
- dashboard, reports, accounting, and admin access should be granted intentionally by role

On development systems, login can be relaxed temporarily. On real deployments, use staff login.

Module Navigation

Enabled modules and add-ons now appear as their own sections in the far-left workspace navigation.

That means staff should be trained to open module workflows from the left nav instead of hunting for scattered launch buttons inside settings pages.

Examples:

- [CRM](#)
- [Planning Impos](#)
- [Wegmans Small Format](#)

Owners and admins should confirm that only the modules intended for the account are enabled, and that the team knows where each module now lives in the workspace shell.

Owner-Only Business Data Import

The system now includes an owner-only import center for initial data loading.

Use:

- [Settings > Business Data > Import Center](#)

Supported bulk uploads:

- customers
- contacts
- quotes
- quote lines
- orders
- order lines
- invoices
- invoice lines

Recommended import order:

1. customers and contacts
2. quotes
3. orders
4. invoices

Do not start production work until the owner has confirmed that imported customers, contacts, open work, and invoices match the source system closely enough to operate from.

Microsoft 365 Outbound Email

Outbound email is now configured through Microsoft 365 Graph for the whole MIS.

Use:

- [Settings > Notifications > Email Delivery](#)

Required values:

- from address
- quote request recipients
- Microsoft tenant ID
- Microsoft client ID
- Microsoft client secret
- Microsoft sender mailbox

This configuration is used across:

- quotes
- invoices
- CRM quote requests
- portal notifications
- digest-style system mail

Do not invite staff until a test email succeeds from this screen.

Job Status Setup

There are now two different status layers in the system:

- order lifecycle status
- production status

Order lifecycle status covers the whole job:

- [new](#)
- [in_production](#)

- [on_hold](#)
- [ready](#)
- [shipped](#)
- [delivered](#)
- [invoiced](#)
- [cancelled](#)

Production status is process-specific and comes from live tracked tasks:

- [Printing In Progress](#)
- [Printing Paused](#)
- [Finishing Done](#)
- [Proof / Approval](#)

Production status setup lives in:

- [Settings > Production > Process Statuses](#)

Use that page to map shop-facing production statuses to actual production processes. The order status remains the lifecycle rollup for the whole order.

NCR / Quality Setup

The MIS now includes NCR tracking.

Use:

- [Production > NCRs](#)

NCRs can also be launched from:

- order detail
- item detail
- live task work ticket

Before using NCRs in production, confirm:

- the NCR schema is applied
- the NCR template PDF exists on the app server
- the upload root for NCR PDFs is writable
- the team understands when to use an NCR instead of just writing a note

Production Command Screens

The system now expects the shop to use the command-center views operationally, not just as office summaries.

Core screens:

- [/dashboard](#)
- [/orders/due-today](#)
- [/orders/due-tomorrow](#)
- [/orders/all](#)
- [/production-meeting](#)

These screens now show both:

- order lifecycle status
- live production status

That allows the team to read a row as:

- [Order In Production](#)
- [Production Printing In Progress](#)

instead of only seeing the broad order-level status.

Report Builder

The report builder now behaves more like a database-set ad hoc reporting tool.

Users with report-builder permission can:

- choose a report base
- choose exposed fields from that base and related records
- order the selected columns
- save the report definition
- save runtime search prompts such as date, date range, customer, and PO number

Before relying on it operationally, confirm that the owner or reporting lead understands:

- which bases are available
- which staff should have report-builder permission
- which saved reports should be standardized for management use

Planning Impos

Planning Impos should now be launched from MIS jobs instead of relying on external job imports.

Use:

- the [Planning Impos](#) button on order lines
- the [Planning Impos](#) button on item screens
- the [Planning Impos](#) button on live work tickets

The planner can also load a job by typed job number and item letter.

Wegmans Small Format

If the Wegmans Small Format module is enabled, the MIS now expects staff to use the module from the left workspace nav instead of treating it like a separate app.

The module includes its own workspace screens for:

- order entry
- tracking
- order status
- press files
- materials and processes
- store directory
- settings

Do not migrate historical tracker data until the MIS module is fully validated with live-safe test data.

CRM

The CRM module is now part of the platform when enabled.

Use:

- [CRM > CRM Dashboard](#)

Before using CRM in production, confirm:

- reps are assigned correctly
- follow-up ownership is clear
- Outlook / Microsoft calendar connection expectations are documented internally
- quote request review responsibility is assigned to estimating or management

Owner Go-Live Checklist

This checklist is for the owner, president, GM, or senior operator responsible for taking a print company live in Excelsus IQ.

The point of this guide is not just to turn features on. The point is to make sure the shop can actually quote, convert, schedule, produce, invoice, and report inside one system without confusion.

What Go-Live Means

For this system, go-live means all new production work should be able to move through the following flow:

1. customer selected
2. quote built from catalog data
3. quote approved
4. order created
5. schedule generated
6. production clocked
7. purchasing and receiving handled if needed
8. invoice created
9. payment and reporting handled from the same record set

If any one of those steps is still being done outside the system for normal jobs, the shop is not fully live yet.

Owner Responsibilities

The owner should approve:

- pricing policy
- department structure
- job flow logic
- margin strategy
- tax and accounting defaults
- user access
- go-live date
- first-week escalation rules

The owner should not personally enter every record, but should sign off that the people responsible have completed the setup.

Role Ownership Before Go-Live

AREA	PRIMARY OWNER	SECONDARY OWNER
Company settings	Owner / Admin	GM
Tax and accounting defaults	Owner / Finance	Admin
Vendors and purchasing rules	Purchasing / Admin	Owner
Materials	Estimating / Production	Purchasing
Machines and speeds	Production Manager	Owner

AREA	PRIMARY OWNER	SECONDARY OWNER
Processes and departments	Production Manager	Estimating Lead
Prepress and rush rules	Estimating Lead	Owner
Customers and contacts	Sales / CSR	Admin
Operator skills and schedule settings	Production Manager	Owner
Reports and dashboards	Owner / Finance	Admin

Phase 1: System Readiness

Confirm each of these is complete.

Company

- company name is correct
- slug is correct
- timezone is correct
- logo and brand color are correct
- order, PO, and invoice prefixes are correct
- proof approval rule is intentionally set
- auto-generate schedule on order is intentionally set

Users And Access

- every active employee has a user record
- each user has the correct role
- managers have the right scheduling access
- report permissions are limited to people who need them
- operators who clock time exist as users
- actual labor rate per hour is filled in where actual labor costing matters

Accounting

- tax rates are loaded
- payment methods are configured
- late fee and grace period are configured
- fiscal year setting is correct
- default income and COGS accounts are set if used
- overhead settings are filled in with real monthly numbers

Phase 2: Catalog Readiness

This is the biggest source of go-live failure in print shops. If the catalog is weak, the quotes become weak immediately.

Vendors

- all primary media vendors are loaded
- all outsource vendors are loaded
- all hardware vendors are loaded

- vendor terms and contacts are entered

Materials

- top selling roll materials are loaded
- top selling sheet materials are loaded
- laminate materials are loaded
- rigid substrates are loaded if the shop prints rigid work
- each material has correct dimensions
- each material has correct current cost
- waste, bleed, gutter, and trim assumptions are reasonable

Machines

- primary printers are loaded
- primary cutters are loaded
- laminators are loaded
- mounting or finishing equipment is loaded where applicable
- pricing model matches how the shop actually prices
- speed unit matches the real work driver
- setup time is realistic
- machine cost calculator is filled in for major machines

Processes

- all recurring finishing steps are loaded
- outsourced steps are loaded with vendor and outsource cost
- schedule-relevant processes are marked correctly
- default machine type and department are assigned where applicable

Hardware

- recurring billable hardware is loaded
- cost per unit is current
- minimum quantity is reasonable

Phase 3: Production Readiness

Departments

- departments are set up for the real shop flow
- sort order matches actual production flow

Recommended examples:

- Printing
- Laminating
- Cutting
- Finishing
- Handwork
- Kitpacking
- Packing
- Shipping

- Installation

Shop Hours And Resource Availability

- shop hours match the real plant hours
- working days match the real week
- holiday closures are entered
- machine-specific overrides are entered where needed
- process-specific overrides are entered where needed

Operator Skills

- key operators are assigned to the machines they actually run
- primary operators are marked where the shop depends on them
- skill levels are not left generic if scheduling should respect skill

Job Flow Rules

- at least one default rule exists
- the rule uses department-first sequencing if that is the intended shop model
- one specialty rule exists if the shop has a common alternate flow

Process Sequences

- only recurring special flows are templated
- edge-case flows are not overbuilt before go-live

Phase 4: Estimating Readiness

Estimating Defaults

- default waste is realistic
- default quote validity is intentional
- default margin group is correct
- quote loading percent is intentional
- below-margin warning is on
- machine selection requirement is intentionally on or off

Prepress

- standard prepress exists
- file prep per version exists
- auto-apply is only enabled for charges that should happen on most items

Rush

- rush rules exist for the turnaround levels the shop actually sells
- percent and minimum values are both reviewed

Margin Groups

- standard margin exists
- premium margin exists if rush or specialty work needs it
- wholesale or trade margin exists if the shop sells to resellers

Phase 5: Customer Data Readiness

Customer Master Data

- top customers are loaded
- each active customer has billing data
- shipping data is complete where needed
- default sales rep is assigned
- default CSR is assigned
- default tax rate is assigned
- tax exempt status is correct
- quote loading, discount, commission, and margin defaults are reviewed

Contacts

- each top customer has at least one active contact
- one contact is marked as default
- email and phone are present where the team relies on them

This matters because quotes and orders inherit their header defaults from the customer.

Phase 6: End-To-End Testing

Do not go live before real test jobs have been run end to end.

Minimum Test Scenarios

Run at least these:

1. simple reprint job
2. multi-item quote
3. multi-version quote
4. rush quote
5. job with laminate
6. job with cutting and handwork
7. outsourced step or purchased component
8. taxable job
9. tax-exempt job
10. invoice and payment

For Each Test Job, Confirm

- customer loads correctly
- default contact appears
- sales rep and CSR inherit correctly
- item quantities and versions total correctly
- prepress applies correctly
- rush applies correctly
- machine and process costs calculate
- quote converts to order
- order schedules correctly
- operator can clock in

- actuals update
- PO can be linked if needed
- invoice totals are correct

Go-Live Approval Table

AREA	APPROVAL QUESTION
Pricing	Are we comfortable selling from these rates today?
Customers	Do quotes and orders inherit the right defaults?
Production	Will the default flow match how the floor really works?
Scheduling	Can the production manager trust the schedule output?
Actuals	Can operators clock in and produce usable labor data?
Accounting	Are tax, invoice, and payment defaults acceptable?

If the answer is **no** to any of those, delay go-live until the gap is closed.

Cutover Plan

Choose one cutover rule and stick to it.

Recommended Cutover

- existing open jobs stay in the old process if they are close to completion
- all new quotes from the cutover date forward are created in Excelsus IQ
- all approved new quotes become orders in Excelsus IQ

This is usually cleaner than trying to backfill every old job midstream.

Day-Before Go-Live Checklist

- team has been told the go-live date
- estimator guide has been reviewed
- production floor SOP has been reviewed
- one person is assigned as first-line support for sales and CSR
- one person is assigned as first-line support for production
- fallback contact is assigned for accounting and invoicing questions
- browser logins and sessions are working for all users

Day-1 Go-Live Checklist

Morning

- confirm all users can log in
- confirm manual pages are visible in Settings
- confirm one known customer opens correctly
- confirm one new quote can be built
- confirm one quote can be converted to an order

- confirm one order hits the schedule
- confirm one operator can clock into a task

Midday

- review first quotes created that day
- review first orders created that day
- verify no one is bypassing customer defaults manually
- verify schedule steps look correct

End Of Day

- review errors and confusion points
- correct catalog or settings issues immediately
- write down any training gaps

First Week Control Plan

During the first week, the owner or GM should review:

- all quotes over the shop's normal approval threshold
- all rush jobs
- all jobs with unusual finishing
- schedule exceptions
- unassigned or unscheduled tasks
- operator clocking compliance
- invoice totals on the first few jobs

The point is not to micromanage forever. The point is to catch setup defects while the job count is still manageable.

Metrics To Watch During First Month

Track at least:

- quotes created
- quote win rate
- orders scheduled on time
- unscheduled tasks near due date
- average rush use
- time-entry completion rate
- invoice turnaround time
- gross margin on completed jobs

Stop-Ship Conditions

Pause go-live or pause full rollout if any of these happen repeatedly:

- customer defaults are wrong on most quotes
- machine or material rates are obviously unreliable
- schedule is sequencing work incorrectly
- operators cannot reliably clock time
- invoices are calculating incorrectly
- staff are building jobs outside the intended workflow

Final Sign-Off

The owner should be able to answer **yes** to all of these:

1. Do we trust the quote enough to send it to a customer?
2. Do we trust the order enough to hand it to production?
3. Do we trust the schedule enough to run the floor from it?
4. Do we trust the actuals enough to learn from them?
5. Do we trust the invoice enough to bill from it?

If yes, the shop is live.

New Modules To Validate Before Full Rollout

The platform now includes several major areas that should be explicitly validated before the shop treats them as production-ready.

Dashboard And Production Meeting

Confirm the team can use:

- **/dashboard**
- **/orders/due-today**
- **/orders/due-tomorrow**
- **/orders/all**
- **/production-meeting**

Management should confirm the data is believable enough to run the daily meeting from these screens.

Also confirm those screens show both:

- order lifecycle status
- live production status

The team should be able to read a row quickly without asking:

- is the order generally in production?
- what process is it actually in right now?

Product Catalog

Confirm:

- the Production Library naming is understood
- repeatable products are templated correctly
- fixed unit price products calculate correctly
- customer-locked templates behave correctly
- quote and order launch from product templates works cleanly

Inventory And Requirements Planning

Confirm:

- on-hand balances are loaded
- reserved quantities change correctly
- PO receiving increases inventory
- material usage reduces inventory
- spoilage is being captured
- cycle counts work

- the team knows where the daily requirements report lives

Required report:

- [Inventory > Daily Requirements](#)
- route: </inventory/requirements>

AI Features

Confirm:

- AI infrastructure is configured
- only intended AI features are enabled
- prompt templates are reviewed
- review queue ownership is assigned
- staff understand that AI output is advisory, not autonomous

Customer Portal

Confirm:

- visible statuses are configured
- file upload rules are configured
- reorder behavior is configured
- portal upload and reorder data is visible internally
- customer-facing milestone emails behave correctly

Staff Login And Permissions

Confirm:

- owner login works
- owner knows the organization workspace slug
- each real staff member has a named login
- dashboard, report, accounting, and admin permissions are assigned intentionally
- no shared office-wide credential is being used as the operating model

Module Navigation

Confirm:

- enabled modules appear correctly in the far-left workspace navigation
- staff know to launch modules from the left nav instead of settings shortcuts
- only modules intended for this account are turned on

Microsoft 365 Email Delivery

Confirm:

- Microsoft tenant ID is entered
- Microsoft client ID is entered
- Microsoft client secret is entered
- sender mailbox is entered
- from address is correct
- quote request recipients are correct
- a test email succeeds from [Settings > Notifications > Email Delivery](#)

Do not treat outbound mail as ready just because the values are filled in. Send the test email.

Business Data Import Center

If using bulk upload for initial data load, confirm:

- import templates were used, not ad hoc spreadsheets
- customers and contacts are loaded first
- quotes, orders, and invoices are loaded in order
- imported counts match the source system closely enough
- a human spot-checked several imported customers, orders, and invoices

Report Builder

Confirm:

- report-builder permission is limited to the right users
- the owner or reporting lead understands how to choose a report base and fields
- saved operational reports use the intended runtime prompts such as date range, customer, and PO number
- at least one real saved report has been tested end to end

Quote Intelligence And Dashboards

Confirm:

- the leadership team understands quote intelligence is advisory only
- quote outcomes are being captured as won, lost, expired, or no decision
- loss reasons are being recorded on lost work
- the team understands the difference between quote intelligence and similar completed-job costing
- at least one manager knows how to read win rate by estimator, customer, product type, margin band, and amount band
- at least one scheduling lead understands the promise-date accuracy dashboard and how override behavior affects customer commitments
- vendor scorecards are assigned to a real owner if purchasing is active

NCR And Quality Controls

Confirm:

- NCR schema is applied
- NCR screens load
- NCR create path works from an order or item
- generated and uploaded NCR PDFs are stored correctly
- quality ownership is assigned

Process-Linked Production Statuses

Confirm:

- [Settings > Production > Process Statuses](#) is configured
- production status labels make sense for real processes
- the production meeting and due-order screens show both order and production statuses
- production staff understand that process status drives the floor view while order status remains the job rollout

Wegmans Small Format

If the Wegmans Small Format module is enabled, confirm:

- the Wegmans schema is applied
- order entry, tracking, order status, and press file screens load

- staff know the module is now accessed from the MIS left nav
- the team is not depending on historical job migration before the MIS workflow is validated

Accounting Sync

Confirm:

- QuickBooks or Xero is only enabled after sandbox testing
- source-of-truth settings are agreed
- sync logs are reviewed
- reconciliation and conflict workflows are assigned to a real owner

Local Test Database

Supabase being current is not enough.

The local `TEST_DATABASE_URL` database used by integration tests also needs to be current. Until that is true, automated regression coverage will continue to skip important end-to-end tests.

Estimator Training Guide

This guide is for estimators, CSRs, sales reps who build quotes, and managers training quoting staff in a print company.

The goal is not just to teach where buttons are. The goal is to teach how to build quotes in a way that protects pricing, production, and handoff quality.

What The Estimator Is Responsible For

An estimator is responsible for turning customer requirements into a quote that production can actually run.

That means the estimator must:

- select the right customer
- confirm the inherited customer defaults
- name the job clearly
- build each item with the correct specs
- choose the right stock, machine, processes, and hardware
- let standard prepress and rush logic apply correctly
- review the final pricing before the quote is sent

What The Estimator Is Not Supposed To Do

Estimators should not:

- override customer defaults casually
- type made-up material costs because a catalog record is missing
- guess machine speeds
- ignore versions or file counts
- use one line item for multiple unrelated products
- send a quote that production cannot interpret

If a recurring stock, process, or hardware item is missing, ask for the catalog to be updated instead of rebuilding it manually over and over.

Before Starting Any Quote

Confirm these first:

1. the customer record exists
2. the customer has the correct default contact
3. the customer has the correct sales rep and CSR
4. the customer's tax status is correct
5. the customer's margin and discount defaults are correct

Remember: quote and order defaults are pulled from the customer record.

Quote Header Basics

When starting a new quote:

1. choose the customer first
2. confirm the default contact appears
3. confirm the inherited sales rep and CSR

4. enter the **Job Name**

Job Name

Job Name is the name of the whole quote, not just one item.

Good job names:

- Trade Show Booth Refresh
- Summer Window Campaign
- Fleet Graphics Package
- Restaurant Menu Reprint

Bad job names:

- Sign
- Reprint
- Order

The job name should help anyone opening the quote later understand the overall job immediately.

Quote Line Basics

Each line is one product or item within the overall quote.

Use **Item Description** for the specific thing being sold on that line.

Good item descriptions:

- 3' x 8' outdoor banners
- counter cards
- wall vinyl graphics
- ACM wayfinding signs
- retractable banner stand graphics

Do not combine unrelated work in one line if it will confuse production or pricing.

Size, Quantity, And Versions

Every line should reflect the real size and quantity structure.

Size

Enter width and height for the actual finished item or the dimension the shop uses for production costing.

Quantity And Versions

The system supports quantity and file or version breakdown rows.

Use them when:

- the same item has multiple versions
- file count affects prepress
- total produced units are quantity multiplied by versions

Example:

- 500 quantity
- 3 versions
- total units = 1,500

If you forget to enter versions correctly, per-version file prep and total quantity logic will both be wrong.

Printing Selection

Choose the correct print orientation or sidedness when relevant.

That impacts:

- production assumptions
- possible prepress logic
- how the job is interpreted later

Do not leave printing assumptions generic if the job is truly 2-sided or multi-pass in a way the shop prices differently.

Customer Defaults The Estimator Must Verify

Once the customer is selected, review these inherited values:

- customer contact
- sales rep
- CSR
- tax
- commission
- automatic discount
- quote loading

If one of those is wrong, the fix usually belongs on the customer record, not just on this one quote.

Material Selection Rules

Use a material record when the shop already buys that stock regularly.

Choose Material Based On Real Production

Ask:

- is it sheet or roll?
- what exact width or sheet size should be used?
- what finish is correct?
- what thickness is correct?
- what vendor cost is represented?

Examples:

- gloss calendared vinyl 54 in roll
- matte banner 38 in roll
- 3 mm ACM 48 x 96 sheet
- 6 mm coroplast 48 x 96 sheet
- 3 mil gloss laminate 54 in roll

Do not estimate from vague materials like:

- vinyl
- banner
- board

If that is all the shop has today, the material catalog needs work.

Machine Selection Rules

Choose the machine that will most likely run the work.

The machine should reflect:

- realistic cost basis
- realistic speed
- real production capacity

Examples:

- wide-format roll printer for vinyl or banner
- flatbed printer for rigid board
- cutter or router where cutting is machine-driven
- laminator where lamination is machine-based

If the shop wants disciplined estimating, do not leave machine selection blank on jobs that clearly require one.

Process Selection Rules

Processes are for the work beyond the base material and machine charge.

Common process examples:

- laminate
- contour cut
- hem
- sew
- grommet
- mount
- pack
- install
- proof
- design

Choose processes when the line truly needs them. Do not add them just because they exist in the catalog.

Hardware Selection Rules

Use hardware for billable accessories or components such as:

- grommets
- standoffs
- frame parts
- hooks
- brackets
- cable kits

Only use hardware when it is a true priced component of the order.

Prepress Rules

The system supports auto-applied prepress.

Standard Prepress

This is usually a fixed charge per item.

Use it when the shop has a baseline file handling or setup charge on most jobs.

File Prep Per Version

This multiplies by the number of versions or files on the item.

Use it when:

- multiple files truly create more prep work
- the shop prices file handling consistently

Examples:

- 1 version -> 1 file prep charge
- 5 versions -> 5 file prep charges

Optional Prepress

Add optional prepress only when the work actually requires it:

- color correction
- variable data setup
- proof creation
- special file cleanup

Rush Rules

Rush is not just a note. If the shop has rush pricing, apply the proper rush rule.

Rush rules use whichever is higher:

- the percentage calculation
- the minimum rush charge

The estimator should:

1. confirm the requested turnaround
2. choose the matching rush rule
3. not hide rush in random line pricing if the shop wants consistent policy

Margin Discipline

Estimators should understand the difference between:

- base cost
- margin target
- quote loading
- automatic discount
- rush
- commission

If the builder warns that pricing is below the intended margin floor, stop and review before sending.

Do not assume a low-margin quote is acceptable just because the total looks large.

Quote Review Checklist Before Sending

Review each quote in this order:

1. correct customer?
2. correct contact?
3. clear job name?
4. each item clearly described?
5. sizes correct?
6. quantity and versions correct?
7. correct material?
8. correct machine?
9. correct processes?
10. correct hardware?
11. prepress correct?
12. rush correct?
13. taxes and discounts correct?
14. pricing believable?

Common Estimator Errors

Avoid these:

- starting the quote before selecting the customer
- using the wrong customer with the right contact name
- forgetting versions on a multi-version job
- using one line for several different products
- choosing a generic material because the correct one is missing
- forgetting laminate or cutting on work that clearly needs it
- manually compensating for bad setup instead of fixing the catalog
- not checking rush
- not checking tax status

Escalation Rules

Escalate to a manager or owner when:

- the requested turnaround cannot realistically be scheduled
- the correct material does not exist in the catalog
- the correct machine is unclear
- the pricing falls below policy
- the customer wants an unusual exception
- the customer default data is clearly wrong

Revision Discipline

When revising a quote:

- keep the original quote context clear
- update the changed specs only
- do not quietly change unrelated assumptions

If the customer changed quantity, versions, size, stock, or turnaround, review the whole line again. One changed spec often affects more than one cost driver.

Shop-Specific Examples

Wide-Format Banner Quote

Estimator should confirm:

- banner material width is correct
- hem and grommet processes are included
- quantity is correct
- rush is applied if needed

Multi-Location Poster Program

Estimator should confirm:

- each version count is correct
- file prep per version applies correctly
- total units reflect quantity multiplied by versions

Rigid Sign Package

Estimator should confirm:

- rigid board material is correct
- flatbed printer is correct
- cutting or routing process is included
- mounting or finishing is included if needed

Training Exercises

Every new estimator should complete these exercises before quoting alone:

1. build a simple one-item reprint quote
2. build a multi-item quote
3. build a quote with three versions on one item
4. build a quote with laminate and cutting
5. build a rush quote
6. correct an intentionally bad customer default

Sign-Off Standard

An estimator is ready to quote alone when they can do all of the following without coaching:

1. select the correct customer and confirm inherited defaults
2. build a clean item structure
3. handle quantity and version rows correctly
4. choose the correct material, machine, process, and hardware
5. apply prepress and rush correctly
6. review the quote for pricing and handoff quality

If they cannot do those six things consistently, they are not ready to own customer-facing quotes.

New Estimating Tools

Several new estimating tools are now in the system. Estimators should understand when to use them and when not to rely on them blindly.

Product Catalog

Use **Product Catalog** when the job is a repeatable, prebuilt product.

Examples:

- standard banners
- yard signs
- posters
- recurring store kits
- other repeatable shop programs

The Product Catalog can now:

- preload material, process, machine, hardware, and sizing assumptions
- use customer-locked or customer-optional templates
- use fixed unit pricing, fixed total pricing, or calculated pricing

If a product template already exists, use it instead of rebuilding the job from scratch.

AI Quote Intake

Natural-language quote intake can now parse a customer request into a draft intake record.

Use it when:

- the request comes in as raw customer language
- the CSR or estimator wants a faster first-pass extraction

Do not treat it as final truth. Review:

- material
- quantity
- versions
- size
- finishing
- due date assumptions

If the AI run is flagged, check the AI review queue before trusting the draft.

Win Probability

Quote detail now includes win probability output and explanation support.

Use it as a decision-support signal, not as permission to underprice work.

Good uses:

- deciding which quotes deserve follow-up attention
- identifying deals that may need pricing review
- seeing whether timing or margin pressure is affecting close odds

Bad uses:

- lowering price automatically just because the score is lower than expected

The quote-intelligence panel is most useful when the estimator reviews:

- win probability

- confidence
- recommended action
- top drivers
- similar historical quotes

Use it like this:

- high score plus high confidence: treat the quote like a real closing opportunity and move fast
- lower score with pricing pressure: review margin, scope, alternates, and customer expectations before chasing harder
- lower score with revision pressure: tighten scope and get the real decision-maker aligned
- strong customer and product history: prioritize follow-up because the pattern is favorable

Do not confuse similar historical quotes with similar completed jobs.

- quote intelligence compares this quote to resolved quote history
- the similar-jobs view compares a line to completed jobs with actual cost history

Use quote intelligence to decide how to pursue the sale. Use similar jobs to decide whether the pricing and production assumptions make sense.

Predictive Promise Date

Quote and order flow now include promise-date guidance.

Estimators should review:

- optimistic date
- recommended date
- high-risk date
- explanation of capacity or backlog pressure

If the customer wants a date earlier than recommended, escalate. Do not quietly overpromise.

Production Library Import Center

There is now a bulk import path for:

- materials
- laminate
- hardware
- processes
- machines

If a recurring stock or hardware item is missing, use the import center or have the admin update it there. Do not keep inventing manual one-off records in active quotes.

CRM Quote Request Workflow

If CRM is enabled, not every quote request starts inside the quoting screens.

Sales can now submit quote requests through CRM and route them to estimating or management review.

Estimators should understand:

- rep quote requests may arrive from CRM
- the quote request must be reviewed before it is sent back to the rep
- the MIS quote record may be linked back to the CRM request

Do not bypass this review path by emailing numbers back informally if the request was submitted through CRM.

Order Status Versus Production Status

Estimators should understand the difference because customers often ask for “status” and the system now shows two kinds.

Order lifecycle status is the whole-job rollup:

- new
- in production
- ready
- shipped
- invoiced

Production status is the live shop step:

- printing in progress
- printing paused
- finishing done
- proof / approval

When promising dates, use the production context, not just the broad order status.

NCR Awareness For Estimating

Estimators do not usually create NCRs, but should understand them because NCR cost and root-cause data feed future pricing quality.

When NCRs accumulate on a product or material combination, estimating should review:

- setup assumptions
- spoilage assumptions
- speed assumptions
- labor assumptions
- outsourced finishing assumptions

If estimating never reacts to NCR and actuals data, estimates drift away from reality.

Production Floor SOP Guide

This guide is for production managers, leads, operators, finishers, pack-out staff, and anyone on the floor using Excelsus IQ to run print work.

It is written as a standard operating procedure for print companies that want the schedule, task status, time tracking, and production handoff to stay clean.

Purpose

The purpose of this SOP is to make sure production staff:

- work from the scheduled job data
- follow the intended department sequence
- clock time correctly
- catch spec issues before production starts
- hand work off cleanly between departments
- close jobs with accurate actuals

Core Rule

The floor should run from the order and schedule, not from memory, hallway conversations, or scraps of paper.

If the screen and the floor disagree, stop and resolve that conflict before work proceeds.

Roles On The Floor

ROLE	MAIN RESPONSIBILITY
Production Manager	owns schedule, priorities, escalations, and re-sequencing
Department Lead	verifies readiness and handoff quality inside the department
Operator	runs assigned task, clocks time, updates progress, reports problems
Finisher / Handwork Staff	completes process tasks in sequence and reports exceptions
Packing / Shipping Staff	verifies quantity, packaging, labels, and shipment readiness

Start-Of-Day SOP

At the start of each shift:

1. review the schedule board
2. check overdue or blocked tasks
3. confirm today's priority jobs
4. confirm machine availability
5. confirm staffing and call-outs
6. confirm material readiness for priority work

The production manager should identify any jobs that are:

- due today

- rushed
- blocked
- missing stock
- waiting for proof or customer clarification

Before Starting Any Task

Before an operator starts a task, confirm:

1. this is the correct job
2. this is the correct item
3. this task is ready in sequence
4. required material is available
5. dimensions and quantity make sense
6. the machine or process matches the task

Do not start work just because the job is physically nearby. Start it because the task is ready and correct.

Readiness Check

If any of these are unclear, stop and escalate:

- missing stock
- wrong stock
- missing art or proof status
- wrong quantity
- wrong version count
- wrong finishing path
- wrong due date priority

Clock-In SOP

Operators should clock into the actual scheduled task they are starting.

Clock in when:

- setup work begins
- production work begins
- finishing work begins

Do not wait until the middle of the run. Setup time is part of the real task cost and schedule impact.

During Task Execution

While running a task:

- stay on the assigned job unless re-prioritized by the lead or manager
- record issues immediately
- monitor quality continuously, not only at the end
- stop if the job is clearly wrong or unsafe to proceed

Quantity Completion SOP

When pausing or finishing a task:

- enter quantity completed accurately

- do not guess if actual count is available
- if spoilage matters, communicate it to the lead or manager immediately

Bad quantity actuals create bad schedule and costing data for the rest of the job.

Department Handoff SOP

When one department finishes and another will take over:

1. confirm quantity completed
2. confirm job materials stay with the job
3. confirm any special instructions are visible
4. confirm the next department is not blocked by a missing piece

Examples:

- Printing to Laminating
- Laminating to Cutting
- Cutting to Handwork
- Handwork to Packing
- Packing to Shipping

The handoff is not complete until the next department can act without guessing.

Printing Department SOP

Before printing:

- verify substrate
- verify size
- verify print orientation or sidedness
- verify version count if applicable
- verify artwork release or proof status
- verify machine assignment

During printing:

- monitor first output carefully
- watch for color, banding, registration, or media-feed issues
- stop if output is clearly not saleable

After printing:

- stage prints cleanly for the next step
- label or separate versions if needed
- do not mix versions

Laminating Department SOP

Before laminating:

- verify the correct laminate type
- verify finish
- verify cure or wait time if the shop requires it
- verify the correct item count

During laminating:

- watch silvering, skew, bubbles, and edge issues
- stop if the film or output is not acceptable

After laminating:

- keep work identified by item and version
- protect edges and surfaces before handoff

Cutting Department SOP

Before cutting:

- verify the correct file or cut path
- verify the correct material stack
- verify quantity and version separation
- verify whether cut tolerance matters for the product

During cutting:

- inspect first-piece accuracy
- do not continue a bad cut path because the machine is already running

After cutting:

- count usable output
- separate remakes or defects
- send only acceptable pieces forward

Handwork And Finishing SOP

For handwork tasks such as:

- grommeting
- hemming
- taping
- assembly
- kitting
- packaging preparation

Confirm:

- count is correct
- orientation is correct
- finishing instructions are present
- all required accessories are available

Packing SOP

Before packing:

- confirm finished quantity
- confirm all versions or item groups are included
- confirm accessories are included
- confirm packing standard for the customer

Packing errors are customer-facing errors. Treat this as a quality gate, not as an afterthought.

Shipping SOP

Before shipping:

- confirm the job is truly complete
- confirm packaging is correct
- confirm labels or shipment references are correct
- confirm any will-call or delivery instructions are correct

Do not mark work as ready to ship if it is still waiting on:

- missing quantity
- missing hardware
- missing paperwork
- pending rework

Pause And Problem SOP

Pause work and escalate when:

- material is wrong
- quantity is wrong
- art is wrong
- cut path is wrong
- machine output is unacceptable
- next step is unclear
- due date priority changed

The correct behavior is to stop a bad job early, not to finish a bad job quickly.

Rework SOP

If a task needs rework:

1. notify the lead or manager
2. identify the cause
3. separate rework from good output
4. do not silently pass defects to the next department

The team should know whether the problem came from:

- data or quoting
- material
- machine output
- operator error
- finishing damage

End-Of-Task SOP

At the end of each task:

1. clock out or pause correctly
2. enter quantity completed
3. add notes if something important happened
4. confirm the next department is not blocked unnecessarily

End-Of-Shift SOP

At the end of each shift:

- close active time entries unless instructed otherwise
- stage in-progress jobs safely
- identify jobs that are blocked
- identify jobs that need priority tomorrow
- leave machine and work area in proper condition

The production manager or lead should review:

- open in-progress tasks
- overdue tasks
- blocked tasks
- jobs that are short of due-date expectations

Data Discipline Rules

The floor should follow these rules every day:

1. always clock into the real task
2. always update quantity honestly
3. never mark complete if the job still needs work
4. never skip reporting a problem because it seems small
5. never pass unknown work to the next department

What Production Should Escalate Back To CSR Or Estimating

Escalate when:

- customer-facing specs do not match physical reality
- the quote missed a major finishing step
- quantity or versions do not match the production need
- material selected is not appropriate
- due date expectation is unrealistic

Production should not quietly absorb those mistakes forever. The system only improves if those issues are fed back to the people who set the job up.

Daily Management Review

At least once per day, production leadership should review:

- rushed jobs
- unscheduled tasks
- blocked tasks
- overdue work
- jobs with heavy rework
- jobs with missing time entries

First-Principles Standard

The floor should be able to answer **yes** to these questions at any time:

1. Do we know what to run next?

2. Do we know whether the current task is actually ready?
3. Do we know who is working on it?
4. Do we know how much is done?
5. Do we know what the next department needs?

If the answer is **no**, stop and clean up the workflow before the confusion spreads.

Production Command Center SOP

The main dashboard is now a shared production command screen, not just an office summary page.

Supervisors, leads, CSR, and management should use:

- **Dashboard**
- **Orders Due Today**
- **Orders Due Tomorrow**
- **All Orders**
- **Production Meeting**

The **Production Meeting** screen is the meeting-safe view for the 9:00 AM review.

Use it to review:

- all orders due today
- all orders due tomorrow
- blocked jobs
- jobs waiting on proof, files, or customer action
- jobs with pinned or important internal notes

These operational screens now show two statuses together:

- order lifecycle status
- live production status

Read them differently:

- order lifecycle status tells you where the full order stands commercially and operationally
- production status tells you what process the floor is actually in right now

Example:

- **Order In Production**
- **Production Printing In Progress**

That is intentional. Production should not rely on only the broad order status when deciding what to do next.

Process-Linked Status SOP

Production status is now tied to tracked production processes.

This means:

- printing tasks should surface printing statuses
- finishing tasks should surface finishing statuses
- shipping-related tasks should surface shipping statuses

Managers and owners configure the shop-facing production statuses in:

- **Settings > Production > Process Statuses**

Floor staff should not manually reinterpret those labels. If a label is wrong, fix the process-status mapping instead of creating local workarounds.

NCR SOP

The system now includes NCR tracking for real quality events.

Use NCRs when:

- work must be redone
- quality failure needs formal documentation
- cost impact must be captured
- root-cause analysis is needed

Do not use NCRs for:

- routine operator notes
- normal setup observations
- informal reminders that belong in production notes

Create an NCR from:

- the order
- the item screen
- the live work ticket

Production leads should review NCR trends during the week, not only when a customer complains.

Daily Material Requirements SOP

The main daily material planning report is:

- [Inventory > Daily Requirements](#)
- direct route: </inventory/requirements>

This report should be reviewed every day by production leadership and purchasing.

Use it to answer:

1. What jobs need material today?
2. What jobs need laminate today?
3. What hardware is required for upcoming work?
4. What is allocated already?
5. What is still short on hand?

Each row shows:

- job number
- customer
- due date
- job / line description
- component type
- quantity needed
- unit of measure
- job allocated quantity
- inventory reserved quantity
- inventory on-hand quantity
- inventory available quantity

Material Usage Capture SOP

Material usage entry is now part of inventory accuracy.

Operators are required to record material usage on tasks where the machine or process is marked:

- Requires Material Usage Capture

This is configured in the Production Library on:

- machines
- processes

In practice, this is typically used for:

- print processes
- precut / cutting processes
- laminate-consuming finishing steps when the shop wants actual laminate usage recorded

When recording usage, the operator should enter:

- actual quantity used
- spoilage quantity
- notes if there was overrun or waste

If actual usage exceeds the reserved quantity, the system still deducts the overrun so stock stays honest.

Inventory Discipline Rules

Production should follow these rules:

1. Do not pull material without checking the allocation or requirement.
2. Do not leave material usage blank on capture-required tasks.
3. Record spoilage when it happens, not later from memory.
4. Use inventory adjustments for stock corrections instead of hiding the problem in task notes.
5. Escalate material shortages during the production meeting, not after the due date slips.

Cycle Count SOP

Inventory now supports cycle counts and count sheets.

Use cycle counts to verify:

- high-value material
- laminate
- frequently used stock
- material with repeated shortages

Cycle count workflow:

1. create the count
2. count the listed stock by location / bin / lot
3. review the variance
4. finalize the count and correct the inventory record

Reporting And Intelligence Guide

This guide explains what reporting data Excelsus IQ is meant to give a print company, how the reporting tools actually work, and what actions managers, estimators, customer service, production, purchasing, and finance should take from that data.

The goal is not to create more dashboards for their own sake. The goal is to help the shop use one clean operating record set for decisions.

What Reporting Is Supposed To Do

In this system, reporting should help the shop answer questions like:

- what is due and at risk right now
- what is profitable and what only looks busy
- where we are leaking time, waste, or margin
- which customers and product types convert well
- which quotes need action today
- which vendors are helping or hurting execution
- how much cash is still open

If reports are not tied to real actions, the team will stop trusting them.

Source-Of-Truth Rule

The reports only stay useful if the operating data is clean.

That means:

- quotes should be built from real customer, catalog, and pricing defaults
- approved quotes should become orders instead of being retyped elsewhere
- production should clock time against the real scheduled tasks
- purchase orders and receiving should be recorded in the system
- invoices and payments should be recorded against the correct customer and job
- quote outcomes should be captured after the sale is won, lost, expired, or abandoned

Bad source data creates misleading reports. Reporting is not the place to fix operating discipline after the fact.

Reports Center Structure

The reports area is split into several access-controlled sections.

SECTION	MAIN PURPOSE	TYPICAL USERS
Standard Reports	Fast operational views and prebuilt report links	managers, CSRs, sales, operators with permission
Report Builder	Ad hoc exports across multiple datasets and related records	owner, admin, reporting lead, selected managers
Accounting Reports	receivables, revenue, profitability, commissions, invoice operations	owner, finance, admin, selected managers
Dashboards	KPI and intelligence views for sales, scheduling, efficiency, and purchasing	owner, managers, selected leads
Invoice Reports	invoice review, payment allocation, ready-to-bill jobs	finance, admin, CSR, selected managers

Use the simplest section that answers the question.

- Use Standard Reports when the answer already exists.
- Use Report Builder when you need your own column mix.
- Use Dashboards when you need trends, patterns, or decision support.
- Use Accounting Reports and Invoice Reports when money movement is the real question.

Standard Reports

Standard reports are the fastest path for recurring operational questions.

They are meant for things like:

- job pipeline review
- customer tax-default review
- quote register review
- purchase order review
- vendor directory review
- invoice operations shortcuts

Use these when the team needs repeatable answers without redesigning a report every time.

Report Builder

Report Builder is the ad hoc reporting tool. It is built for users who know the question they want answered and need to choose the exact fields and output order.

The builder supports these current report bases:

REPORT BASE	BEST USE
Customer	customer defaults, tax, rep, CSR, terms
Customer Contact	contact directory and account ownership
Quote	quote register and quote-level analysis
Quote Items	item-level estimating analysis
Order	operational job pipeline and customer PO tracking
Order Items	item-level production and value analysis
Invoice	invoice review and billing analysis
Invoice Items	line-level billing analysis
Payments	payment audit and cash-application review
PO	purchasing status and received-value tracking
PO Items	component-level purchasing review
Suppliers	vendor directory and supplier master-data review

How To Use Report Builder Correctly

Build reports from the question backward.

Good examples:

- which rush jobs due this week are still not shipped
- which jobs for one customer still have open balance
- which quotes over a certain amount expired this month
- which PO items were received late from one vendor

Bad examples:

- adding every possible column because it might be useful later
- saving reports with no naming standard
- using the builder when a standard dashboard already answers the question

Recommended Builder Workflow

1. choose the right report base first
2. add only the fields needed to answer the question
3. set output order so the most important columns come first
4. save runtime filters if the report will be reused by date, customer, PO number, status, or similar prompts
5. save the report with a clear business name

Good saved report names:

- Open Rush Jobs By CSR
- Uninvoiced Shipped Orders
- Declined Quotes Over 2500
- POs Due This Week

Bad saved report names:

- Test
- Report 2
- Custom Export

Runtime Filters

Saved builder reports can preserve runtime filter prompts such as:

- date
- date range
- customer
- status
- PO number
- text contains search

That matters because the saved report should preserve the structure of the question without freezing the answer to one day forever.

What To Do With Builder Output

Use builder output for:

- management reviews
- export-to-CSV work
- one-off audits

- customer-specific or rep-specific operating lists
- exception reports

Do not use builder exports as a permanent shadow system. If a saved report becomes mission-critical, standardize the naming, owner, and review cadence.

Dashboards

Dashboards are where the system moves beyond list views and starts showing patterns.

The dashboards section includes:

- financial and KPI snapshots
- win / loss review
- quote intelligence
- promise date accuracy
- efficiency reporting
- constraint dashboard
- vendor scorecards
- vendor pricing changes

These are not all for the same audience.

Dashboard Use Rule

Every dashboard should answer one of these:

- where do we need to act today
- what pattern is improving or worsening
- which team or process needs coaching
- where are we taking risk without realizing it

If the team cannot name the action, the dashboard is just decoration.

Quote Intelligence

Quote Intelligence exists in two forms:

- a per-quote intelligence panel on quote detail
- a dashboard report showing pattern trends across quote history

Both are advisory only. They are meant to improve follow-up, pricing discipline, and understanding of what the shop wins well.

What The Per-Quote Intelligence Panel Shows

On the quote itself, the panel shows:

- win probability
- confidence level
- recommended action
- resolved history count
- explanation text
- top drivers
- similar historical quotes
- outcome feedback controls

How The Quote Score Works

The current engine is rules-based. It does not make up an answer from nothing.

It starts from historical resolved quote outcomes and adjusts the score using factors such as:

- customer history
- product history
- sales rep history
- margin band
- quote amount band
- quantity band
- revision count
- first response versus revised quote
- competitive pricing pressure
- seasonality
- turnaround pressure
- similar historical quotes

The system then assigns:

- a win probability percent
- a confidence label
- a recommended action

Recommended Actions

The current action categories are:

RECOMMENDATION	WHAT IT MEANS OPERATIONALLY
Aggressive Follow-Up	good conversion signal, deserves active pursuit
Standard Follow-Up	normal follow-up cadence is appropriate
Pricing Review	the deal may be at risk because of price or margin pressure
Low Priority	weak conversion signal, do not over-invest time without another reason

Confidence

Confidence tells you how much clean history the score had to work with.

- High confidence means there is enough history and enough matching factors to lean on the result more heavily.
- Medium confidence means useful signal exists, but judgment still matters.
- Low confidence means the system is showing a directional clue, not a strong prediction.

Do not confuse a high score with high confidence. A quote can score well with thin data and still deserve human caution.

Top Drivers

Top drivers explain why the score moved.

Examples:

- customer history is strong
- comparable product types close well

- multiple revisions are hurting odds
- rush pressure is making the deal riskier
- pricing-sensitive notes or loss history suggest competitive pressure

This is the part managers and estimators should actually read.

The right use is:

- if price pressure is negative, review pricing strategy
- if revision pressure is negative, tighten scope and get decision-makers aligned
- if customer and product history are strong, prioritize follow-up and speed

Similar Historical Quotes

The quote panel shows similar historical quotes, not similar completed jobs.

Those matches are driven by items such as:

- same customer
- shared product type
- same sales rep
- similar quote amount band
- similar quantity band
- similar turnaround pressure

Use similar historical quotes to answer:

- have we won this kind of quote before
- is this customer usually a closer or a shopper
- are we seeing the same kind of quote come back repeatedly

Do not use similar historical quotes as a substitute for actual cost history.

Similar Historical Quotes Versus Similar Jobs

This distinction matters.

- Quote Intelligence uses historical quote outcomes.
- The quote builder's similar-jobs view uses completed jobs with actual cost data.

Use quote intelligence when the question is:

- are we likely to win this
- what is making the deal stronger or weaker

Use similar jobs when the question is:

- how did close-to-this work actually cost out in production
- what margin did we really earn on similar specs

Outcome Feedback

Outcome feedback is the training and analytics label for quote history.

Capture:

- won
- lost
- no decision
- expired

When a quote is lost, also capture:

- reason lost
- competitor
- pricing notes
- freeform notes

This does not automatically change the entire operational quote status model by itself. It labels the quote for future analysis and intelligence.

If the team never records outcomes, quote intelligence becomes thin and unreliable.

Quote Intelligence Dashboard

The Quote Intelligence dashboard is the cross-quote pattern view.

It tells you things like:

- resolved quote count
- won quote count
- overall close rate
- recommendation mix
- win rate by estimator
- win rate by customer
- win rate by product type
- margin bands versus close rate
- turnaround pressure versus close rate
- quote amount bands versus close rate

How To Use Quote Intelligence Data

Use win rate by estimator to:

- spot coaching needs
- see who is qualifying well
- identify quoting teams that need pricing or scope discipline

Use win rate by customer to:

- identify strategic accounts
- identify chronic shoppers
- decide where relationship effort pays back

Use win rate by product type to:

- see what the shop wins best
- identify offerings that may be overquoted or poorly positioned
- decide where to focus sales energy

Use margin bands versus close rate to:

- test whether the shop is underpricing to win
- find where margin is healthy without collapsing close rate
- separate real pricing pressure from estimator fear

Use turnaround pressure versus close rate to:

- see whether rushed work is actually worth chasing
- coach staff on when rush promises reduce close quality or execution quality

Use amount bands versus close rate to:

- understand which deal sizes convert best
- see whether small quotes are consuming too much effort
- identify strategic thresholds where management review should be required

What Quote Intelligence Should Not Be Used For

Do not use it for:

- automatic discounting
- approving bad-margin work just to increase close rate
- blaming one rep from small sample sizes
- treating one dashboard period as permanent truth

It is meant to improve judgment, not replace it.

Win / Loss Reporting

Win / Loss reporting is the more direct sales-outcome view.

It is built for:

- total quoted dollars
- won dollars
- win rate
- average margin on won jobs
- loss reasons
- rep rows
- quote detail rows

Use it when management wants direct sales-performance review instead of predictive pattern review.

How To Act On Win / Loss Data

- If loss reasons cluster around price, review estimating strategy and competitor pressure.
- If loss reasons cluster around timeline, review promise-date discipline and shop capacity.
- If one rep wins at low margin, coach qualification and pricing.
- If won dollars are high but average margin is weak, revenue quality needs attention.

Promise Date Accuracy

Promise Date Accuracy is a scheduling-intelligence tool, not just a report.

It tells the team:

- how many jobs were predicted
- how many shipped
- on-time rate
- override rate
- forecast accuracy distribution
- override outcomes
- departments causing promise risk
- on-time performance mix

How To Use Promise Date Data

Customer service and production should use it to answer:

- are we overpromising
- are managers overriding the recommended date too often
- which departments are creating backlog risk
- whether override behavior is helping or hurting on-time delivery

Good actions from this dashboard:

- adjust commitment discipline
- escalate staffing or machine bottlenecks
- stop promising dates earlier than the shop can hold

Efficiency Reporting

Efficiency reporting answers whether production is running close to plan.

Current areas include:

- waste reporting
- operator efficiency
- makeready reporting

Waste Reporting

Use waste reporting to review:

- spoilage cost
- waste percent
- weekly waste trends

Act on it by:

- finding repeat spoilage causes
- revising setup assumptions
- retraining process steps
- tightening quality gates

Operator Efficiency

Use operator efficiency to compare estimated versus actual hours.

Act on it by:

- finding consistent overruns
- coaching on setup discipline
- checking whether estimates are unrealistic
- separating a training issue from a planning issue

Makeready Reporting

Use makeready reporting to review setup time, run time, and trend direction by machine.

Act on it by:

- seeing where setup is drifting longer
- deciding when routing or batching needs to change
- validating machine standards against real time

Constraint Dashboard

The Constraint Dashboard shows queue dwell and bottleneck behavior between departments.

Use it when the shop feels busy but cannot clearly identify where work is sticking.

It helps answer:

- where jobs are waiting longest
- which departments are driving downstream delay
- which specific jobs are sitting in the bottleneck

This is for production leadership and operations review, not estimator guesswork.

Vendor Scorecards And Vendor Pricing Changes

Purchasing dashboards help the shop manage supplier quality and cost movement.

Vendor scorecards show measures like:

- on-time rate
- incidents
- spend
- receipt price drift or variance

Use them to:

- move work away from unreliable vendors
- support better vendor review conversations
- avoid paying higher prices without noticing

Vendor pricing changes help the shop review submitted supplier cost updates and maintain approval history.

Use that data to:

- control cost updates before they silently change estimating quality
- document who approved price changes
- keep catalog costing current

Accounting Reports

Accounting reports answer financial questions rather than pure operating questions.

They cover areas like:

- A/R aging
- revenue
- job profitability
- commissions
- overhead recovery
- invoice operations

How To Use Accounting Data

Use A/R aging to:

- prioritize collections
- spot chronic late payers
- decide whether new work needs tighter terms

Use revenue reports to:

- review monthly billing trends
- compare expected sales performance against actual invoiced work

Use job profitability to:

- compare estimate versus actual
- find jobs that looked profitable but were not
- improve future pricing and production standards

Use commissions to:

- validate payout logic
- catch disputes before payroll closes

Use overhead recovery to:

- see whether the shop is covering its fixed operating burden through real work volume

Invoice Reports

Invoice Reports are the operational billing workspace.

Use them for:

- invoice review
- payment allocation
- identifying open balances
- seeing ready-to-invoice jobs

This is where finance, admin, or CSR staff should work when they are trying to complete the billing cycle instead of just reviewing a KPI.

Role-Based Use Of Reporting

Owner Or GM

Use reporting to manage:

- revenue quality
- margin health
- close rate trends
- overdue receivables
- vendor performance
- bottlenecks

Main screens:

- Dashboards
- Accounting Reports
- Quote Intelligence
- Job Profitability
- Promise Date Accuracy

Estimating Lead

Use reporting to manage:

- close rate by product type
- margin bands versus close rate

- similar jobs with actuals
- NCR and waste feedback loops

Main screens:

- Quote Intelligence
- Win / Loss
- Job Profitability
- similar-jobs view in quote builder

CSR Or Sales Management

Use reporting to manage:

- follow-up priorities
- customer behavior
- rep performance
- due-date risk

Main screens:

- Quote Intelligence
- Win / Loss
- Job Pipeline
- Promise Date Accuracy

Production Manager

Use reporting to manage:

- queue risk
- operator overrun
- waste
- setup drift
- due-order risk

Main screens:

- Constraint Dashboard
- Efficiency reports
- Promise Date Accuracy
- daily requirements and due-order views

Purchasing

Use reporting to manage:

- PO status
- received value
- supplier performance
- price changes

Main screens:

- Purchase Order reports
- Vendor Scorecards
- Vendor Pricing Changes

Finance

Use reporting to manage:

- A/R
- revenue
- payment allocation
- profitability
- overhead recovery

Main screens:

- Accounting Reports
- Invoice Reports
- Financials dashboard

Data Hygiene Checklist For Reliable Reporting

If the shop wants trustworthy data, confirm these are true:

- quote outcomes are captured
- loss reasons are not left blank on lost work
- quote statuses are not left stale
- customer defaults are maintained on the customer record
- sales reps and CSRs are assigned correctly
- tax settings are correct
- approved quotes become orders instead of being recreated manually
- tasks are clocked in and out accurately
- quantity actuals are recorded honestly
- waste and NCR events are captured when they matter
- POs are received in the system
- invoices are created from the real work
- payments are allocated to the correct invoice

Common Reporting Mistakes

Avoid these:

- judging a rep, customer, or product type from too little history
- reading a low-confidence quote score as a final answer
- using revenue without also checking profitability
- using close rate without checking margin quality
- using overdue counts without checking dollar exposure
- saving builder reports with unclear names and no owner
- exporting to spreadsheets and then trusting the spreadsheet more than the MIS

Daily, Weekly, And Monthly Cadence

Daily

Review:

- dashboard summary cards
- due and at-risk work

- promise-date risk
- invoice and ready-to-bill queue

Weekly

Review:

- win / loss
- quote intelligence patterns
- waste and operator efficiency
- vendor issues
- open A/R exceptions

Monthly

Review:

- revenue
- profitability
- overhead recovery
- customer and product-type close-rate trends
- estimator coaching needs
- vendor performance drift

Final Rule

The value of reporting is not that the system can calculate a number.

The value is that the team uses that number to:

- change priorities
- correct setup
- coach behavior
- improve pricing
- protect margin
- improve delivery performance

If the data never changes behavior, the reporting stack is unfinished even if every chart loads.