

Estimator Training Guide

Use this guide to train estimators to build quotes consistently and avoid pricing or production handoff errors.

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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.