



The QuickBooks™ Client Newsletter

Helping You Grow a Profitable Business with QuickBooks™ Software

From the office of:

Accounting Connections, LLC

2624 Gladstone Terrace

Woodstock, Georgia 30189

Office (770) 516-5987 Cell (770) 846-7799

Website: www.AccountingConnections.ORG

December 2018

Need to Create Estimates? How QuickBooks Can Help You with This.

Estimates can be effective sales tools – if they look professional and offer attractive prices. Here's how to create them using QuickBooks.

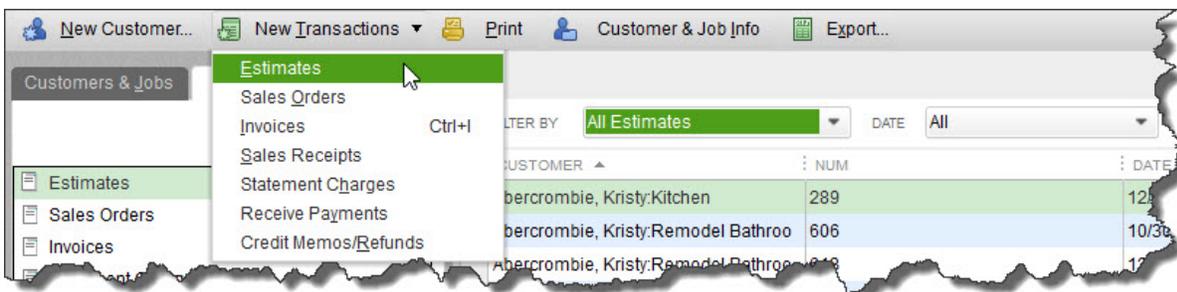
You don't need to be a car repair shop or an HVAC technician to present prospects and customers with estimates. In fact, there may be many times when an unexpected estimate—or bid, or proposal—will land you a job you did not expect.

Of course, the bottom line is the meat of your estimate, the price you are willing to accept for your work; it is your job to determine that price. But let QuickBooks do what it does best: provide intuitive, efficient tools for creating and modifying estimates.

Turn Estimates On

Before you start creating estimates, you will need to make sure they are turned on in QuickBooks. Open the **Edit** menu and select **Preferences**, then **Jobs & Estimates | Company Preferences**. If the **Yes** button below **DO YOU CREATE ESTIMATES?** is not filled in, click inside of it to turn on this feature. Also, the **Warn about duplicate estimate numbers** check box should be activated.

There are actually three ways to open an estimate form. You can click the **Estimates** icon on the home page or open the **Customers** menu and select **Create Estimates**. You can also open the **Customer Center (Customers | Customer Center)** and click on the **Transactions** tab. Click the **New Transactions** button in the toolbar and choose **Estimates**.



If you haven't explored QuickBooks' Customer Center, you should. You can do a lot of your sales work directly from there, like creating estimates.

Making It Yours

Before you create your first estimate, you should make sure that the form's header, footer, and columns contain the fields you want. Use one of the three methods we just outlined to open a blank form. Then, with the **Formatting** tab at the top of the window active, click **Customize Data Layout** in the toolbar that opens to launch the **Additional Customization** window.

Take your time working with the options in this window. QuickBooks gives you an incredible amount of control over how your estimates will look, but don't get ahead of yourself. Start with the most important content: the text you want to have appear. By default, the software opens a template called **Custom Estimate** that contains commonly-used fields, like **Cost**, **Description**, and **Markup**. You can easily change these by checking and unchecking their corresponding boxes.

Warning: Be careful with the **Cost** or **Markup** fields of your estimates. You would not want your customers to see them, so be sure that they are **NOT** checked in the **Print** column.

	Screen	Print	Order	Title
Item	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	Item
Description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2	Description
Mfr Part Number	<input type="checkbox"/>	<input type="checkbox"/>	0	MPN
Quantity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	Qty

*You will check and uncheck boxes to indicate the fields you want to appear in the **Header**, **Columns**, and **Footer** of your estimates.*

You will notice that you can have specific fields appear on the screen and/or on printed copies of your estimates. You can also change the field names (use **Bid** or **Proposal** instead of **Estimate**, for example), and for columns only, the order in which they appear.

As you make changes to this template, you'll see the graphical **Preview** over to the right change to reflect your modifications. Click **Print Preview** to see a larger, finished version of your template. When you're satisfied with it, click **OK**. This will replace your **Custom Estimate** template.

Adding Templates – QuickBooks Forms Customization

You probably noticed other links and icons related to the formatting of estimates. These open advanced tools that we can help you understand. Once you have mastered them, you can save multiple versions of your estimate templates to use in different situations.

These features include:

- **Customize Design.** This opens a multi-step wizard that helps you select a background, font, and grid style.
- **Download Templates.** You can choose from multiple pre-designed templates.
- **Basic Customization.** This window supplies tools for adding a logo and changing colors and fonts.
- **Layout Designer.** We only recommend this tool if you already have freeform design skills.

QuickBooks Forms Customization

Background & Logo 1 Colors & Fonts 2 Grid Style 3 Confirm & Apply 4

Add a logo

Add

Select a Background

Industry Retail

Page: 1 2

NEXT

Upload My Own Background

Rock Castle Construction
1735 County Road
Bayshore, CA 94326

Form Title

*If you want to create a different look for the **Custom Estimate** template or build and save a new one, you can walk through the above customization wizard.*

Just Like Invoices

Creating an estimate in QuickBooks is just like filling out an invoice. You enter data where appropriate, and select options from drop-down lists. If you do not have any experience with sales forms and need some guidance, we are here to help. We can set up a time to go over the entire process – and answer any other questions you might have about QuickBooks while we are at it. So, get started and connect with us at your convenience.

We hope you find this QuickBooks tip helpful. Please visit our company website <http://www.accountingconnections.org> often as it is updated constantly and offers a wealth of tax and accounting tips, along with links to better serve your business needs. Our QuickBooks Tips newsletters are archived on our website as well.

Accounting and Taxation is **our** business; having us a part of your team allows **you** to concentrate on **your** core business.



Diane Offutt, *Managing Partner at Accounting Connections, LLC*
Enrolled Agent (EA), Master of Accounting (MAcc), National Tax Practice Institute Fellowship (NTPI)
And Certified QuickBooks™ ProAdvisor

ENROLLED AGENT | AMERICA'S TAX EXPERT
NATIONAL ASSOCIATION OF ENROLLED AGENTS