1. CPU estimates Workflow
2. Go to customer profile.
3. Pick or create a location for one of our shops.
4. Select Build Estimate

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1. Select the correct business unit and press Build Estimate

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1. Label the estimate name and press create.

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AI-generated content may be incorrect.

1. Add the correct item group to the estimate and readjust the price to what you got on the pricing spreadsheet. (DO NOT USE MISC FLAT PART THIS MESSES UP THE TAXES AND PROCESS FOR THE ORDERING DEPARTMENT).
   1. Add in the CPU disclaimer item group as well

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AI-generated content may be incorrect.

1. Go back to the opportunity.

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AI-generated content may be incorrect.

1. Create a measure sheet for the requested product (I suggest the fillable measure sheet. Let me know if you don’t have one).

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Description automatically generated

10.) Upload measure sheet as an attachment

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1. Once approved make the estimate/opportunity sold.

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12.) Collect the Deposit and add it to customer profile. Your job is now complete, and operations will take it from there.