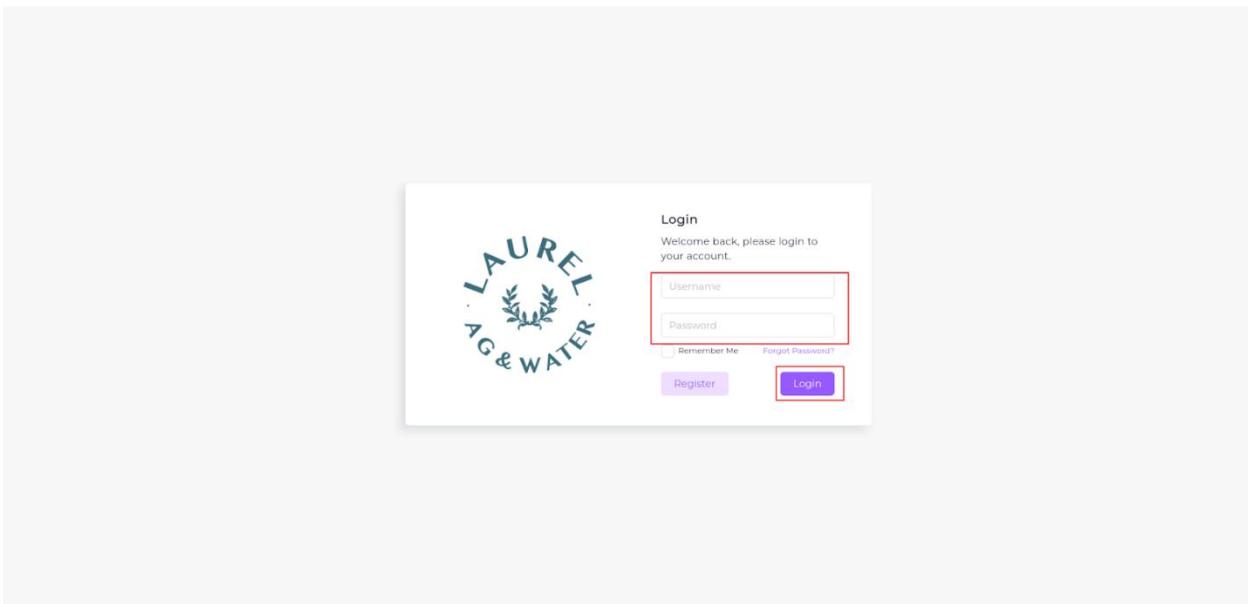


# Laurel Features

## Authorization

### Login

- We will create a single user manually.
- We will add authorization screen where admin can manage users like adding user, update users and enable or disabled user account.
- Users can login via Microsoft account.



# View

## Full Screen View

- Users can switch to full screen mode by clicking on the maximize screen icon located at the top.

Opportunity List

INTERNAL ID	CUSTOMER	ESTIMATION PROCESS	DOCUMENT NUMBER	DESIGNER	ESTIMATOR	PUMP & ELECTRICAL DESIGNER	DESIGN/ ESMATION NOTES	CREATED DATE	LAST UPDATED DATE	ACTIONS
950676	Steven Roland-Old	Labor List	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim Quote	02/06/2023	02/06/2023	
956114	Joseph Turner	Task Mapping	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim Quote	11/06/2024	11/06/2024	
1101294	Paul Leimgruber	Upload CAD File	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim Quote	24/05/2024	24/05/2024	
1194272	Brooke Marchy	Proposal Final Documents	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim Quote	10/06/2024	10/06/2024	
1211476	Brooke Marchy	Proposal Preview	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim Quote	28/06/2024	28/06/2024	
1237947	William Martin	Upload CAD File	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim Quote	17/01/2024	17/01/2024	
1258901	Brooke Marchy	Material List	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim Quote	28/06/2024	28/06/2024	
1271526	Joseph Turner	Proposal Creation	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim Quote	01/07/2024	01/07/2024	
1301926	Brooke Marchy	Generate Estimate	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim Quote	07/10/2024	07/10/2024	
1301933	Brooke Marchy	Generate Estimate	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim Quote	07/10/2024	07/10/2024	

Showing 1 to 10 of 45 entries

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- Users can exit full screen mode by clicking on the minimize screen icon located at the top.

Opportunity List

INTERNAL ID	CUSTOMER	OPPORTUNITY STATUS	CREATED DATE	LAST UPDATED DATE	ACTIONS
950676	Steven Roland-Old	Labor List	02/06/2023	02/06/2023	
956114	Joseph Turner	Task Mapping	11/06/2024	11/06/2024	
1101294	Paul Leimgruber	Upload CAD File	24/05/2024	24/05/2024	
1194272	Brooke Marchy	Proposal Final Documents	10/06/2024	10/06/2024	
1211476	Brooke Marchy	Proposal Preview	28/06/2024	28/06/2024	
1237947	William Martin	Upload CAD File	17/01/2024	17/01/2024	
1258901	Brooke Marchy	Material List	28/06/2024	28/06/2024	
1271526	Joseph Turner	Proposal Creation	01/07/2024	01/07/2024	
1301926	Brooke Marchy	Generate Estimate	07/10/2024	07/10/2024	
1301933	Brooke Marchy	Generate Estimate	07/10/2024	07/10/2024	

Showing 1 to 10 of 45 entries

## Side Panel View

- Users can collapse the sidebar by clicking on the right pointed arrow.

- This feature is present in all the screens.

The screenshot shows a software interface titled "Opportunity List". On the left, there is a sidebar with various navigation options: "Opportunity" (selected), "Products", "Labour Cost", "Customers", "Tasks", and "Vendors". A magnifying glass icon is highlighted with a red box. The main area displays a table with 10 entries. The columns include: INTERNAL ID, CUSTOMER, ESTIMATION PROCESS, DOCUMENT NUMBER, DESIGNER, ESTIMATOR, PUMP & ELECTRICAL DESINER, DESIGN/ESIMINATION NOTES, CREATED DATE, LAST UPDATED DATE, and ACTIONS. The data in the table is as follows:

INTERNAL ID	CUSTOMER	ESTIMATION PROCESS	DOCUMENT NUMBER	DESIGNER	ESTIMATOR	PUMP & ELECTRICAL DESINER	DESIGN/ESIMINATION NOTES	CREATED DATE	LAST UPDATED DATE	ACTIONS	
950676	Steven Roland-Old	Labor List	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafilm Quote	02/06/2023	02/06/2023		
956114	Joseph Turner	Task Mapping	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafilm Quote	11/06/2024	11/06/2024		
1101294	Paul Leimgruber	Upload CAD File	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafilm Quote	24/05/2024	24/05/2024		
1194272	Brooke Marchy	Proposal Final Documents	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafilm Quote	10/06/2024	10/06/2024		
1211476	Brooke Marchy	Proposal Preview	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafilm Quote	28/06/2024	28/06/2024		
1237947	William Martin	Upload CAD File	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafilm Quote	17/01/2024	17/01/2024		
1258901	Brooke Marchy	Material List	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafilm Quote	28/06/2024	28/06/2024		
1271526	Joseph Turner	Proposal Creation	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafilm Quote	01/07/2024	01/07/2024		
1301926	Brooke Marchy	Generate Estimate	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafilm Quote	07/10/2024	07/10/2024		
1301933	Brooke Marchy	Generate Estimate	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafilm Quote	07/10/2024	07/10/2024		

Showing 1 to 10 of 45 entries

## Default View

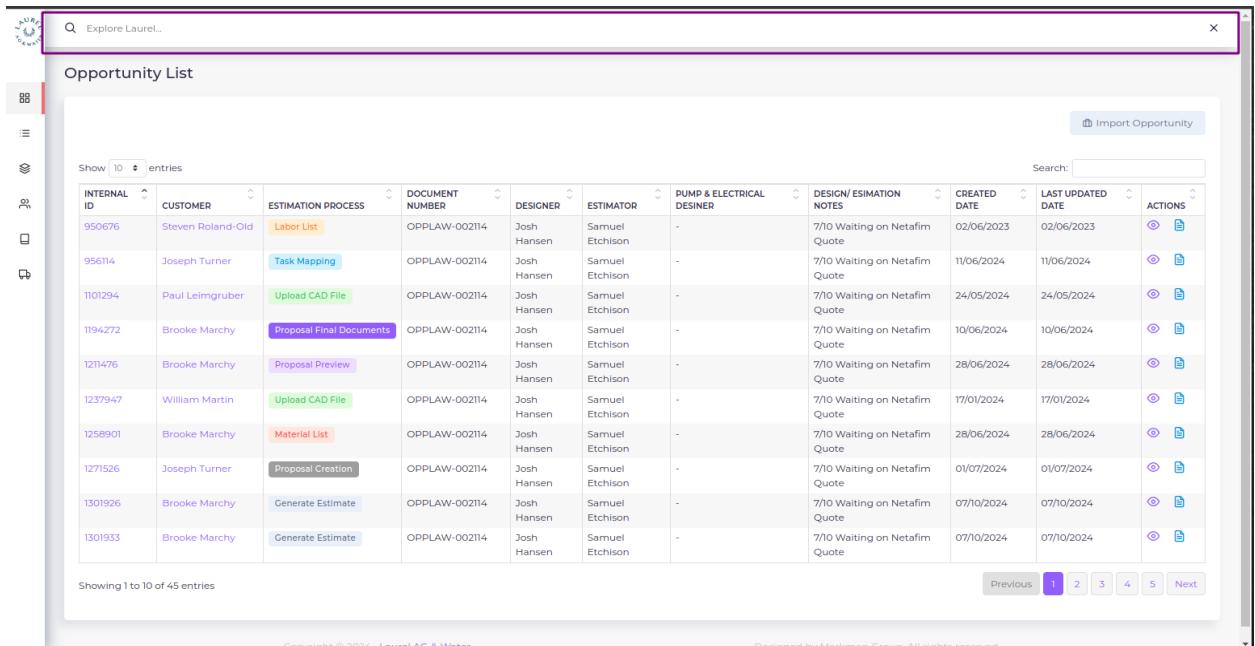
- The default view is visible at the start of the page.
- Users can see the full sidebar by moving mouse cursor on the sidebar panel.
- This feature is present in all the screens.

The screenshot shows the same software interface as the previous one, but the sidebar is now fully visible on the left. The magnifying glass icon is no longer highlighted. The table data is identical to the previous screenshot.

## Global Search

- Users can globally search for opportunities based on Internal ID & Customer name.
- As user types, based on the matched keywords data will float at bottom.

- After clicking on that data, the user will get redirected to appropriate opportunity details.



The screenshot shows a web-based application interface for managing opportunities. At the top, there's a search bar with placeholder text "Explore Laurel..." and a magnifying glass icon. Below it is a header bar with the title "Opportunity List". On the left, there are several filter and search icons. The main area is a table with the following columns:

INTERNAL ID	CUSTOMER	ESTIMATION PROCESS	DOCUMENT NUMBER	DESIGNER	ESTIMATOR	PUMP & ELECTRICAL DESINER	DESIGN/ESIMATION NOTES	CREATED DATE	LAST UPDATED DATE	ACTIONS	
950676	Steven Roland-Old	Labor List	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	02/06/2023	02/06/2023		
956114	Joseph Turner	Task Mapping	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	11/06/2024	11/06/2024		
1101294	Paul Leimgruber	Upload CAD File	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	24/05/2024	24/05/2024		
1194272	Brooke Marchy	Proposal Final Documents	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	10/06/2024	10/06/2024		
1211476	Brooke Marchy	Proposal Preview	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	28/06/2024	28/06/2024		
1237947	William Martin	Upload CAD File	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	17/01/2024	17/01/2024		
1258901	Brooke Marchy	Material List	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	28/06/2024	28/06/2024		
1271526	Joseph Turner	Proposal Creation	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	01/07/2024	01/07/2024		
1301926	Brooke Marchy	Generate Estimate	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	07/10/2024	07/10/2024		
1301933	Brooke Marchy	Generate Estimate	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	07/10/2024	07/10/2024		

At the bottom of the table, there's a message "Showing 1 to 10 of 45 entries" and a navigation bar with buttons for "Previous" and "Next", along with page numbers 1, 2, 3, 4, 5.

## Product List

### Import Product

- Users can import product data from the CSV Master Data sheet.
- When users import master data for a product, we verify the data and will display a notice such as "Please enter valid file" if the data does not match the requirements of file.

The screenshot shows a product management interface. At the top right, there's a user profile for "James Peter Available". Below the header, a "Product List" title is visible. A modal dialog box titled "Import Products" is open in the center. It contains fields for "UPLOAD FILE" and "CHOOSE FILE", with a "BROWSE" button and an "Upload" button. The main table below the modal lists various product items with columns for Internal ID, Family, Parent, Description, Primary Units Type, Primary Stock Unit, Std Cost, and Preferred Vendor. The table shows entries like "2x HOSE, TAPE & EMISSION DEVICES" under "FAMILY" and "MICRO JETS" under "PARENT". The "Preferred Vendor" column includes entries such as "Netafim Irrigation Inc.", "Anvil International Smith-Cooper", and "Stockton Pipe & Supply". At the bottom of the page, there are copyright and design credits.

## List View

- Users can see the list of all imported products with sorting & searching capabilities.

This screenshot shows the same product management interface after the import process. The "Import Products" modal is no longer visible. The main table now displays the imported products, including the ones listed in the previous screenshot. The structure of the table remains the same, with columns for Internal ID, Family, Parent, Description, Primary Units Type, Primary Stock Unit, Std Cost, and Preferred Vendor. The "Preferred Vendor" column continues to show the same companies. The footer of the page includes standard links for copyright and design credits.

## Labor Cost List

### Import Labor

- Users can import labor data from the CSV Master Data sheet.
- When users import master data for a labor, we verify the data and will display a notice such as "Please enter valid file" if the data does not match the requirements of file.

The screenshot shows a web-based application interface for managing labor costs. At the top right, there is a user profile for "James Peter" with a small profile picture. Below the header, the title "Labor Cost List" is displayed. A search bar and a "Import Labor Cost" button are visible. The main content area is a table with columns: LABOR TASK, LOCAL LABOR RATES, OUT OF TOWN LABOR RATES, DESCRIPTION, and NOTES. The table lists various labor tasks with their respective rates and descriptions. A modal window titled "Import Labor Cost" is overlaid on the table, containing fields for "UPLOAD FILE" (with "CHOOSE FILE" and "BROWSE" buttons) and an "Upload" button. The table has sorting arrows on each column header and a "Show 10" dropdown menu. At the bottom, there is a footer with copyright information for "Laurel AC & Water" and a note about design by "Markman Group".

## List View

- Users can see the list of all imported labors with sorting & searching capabilities.

This screenshot shows the same "Labor Cost List" page after the import process. The modal is no longer present. The table now includes additional rows for tasks like "Automation: Backflush, Clock, Injector" and "Clean and Re-nozzle Existing Impact Sprinklers 1 sp/min". The notes column provides specific instructions for these tasks, such as using \$3000 for NMC Automation and warehouse cleaning. The rest of the interface remains consistent with the first screenshot, including the header, search bar, and footer.

## Customer List

### Import Customer

- Users can import customer data from the CSV Master Data sheet.
- When users import master data for a Customer, we verify the data and will display a notice such as "Please enter valid file" if the data does not match the requirements of file.

The screenshot shows a customer management interface. At the top right, there's a user profile for "James Peter" with a small photo. Below the header, the title "Customer List" is displayed. A search bar and a "Import Customer" button are visible. The main area is a table listing 100 customer entries. A modal window titled "Import Customer" is overlaid on the table, containing fields for "UPLOAD FILE" and "CHOOSE FILE" with a "BROWSE" button, and a large purple "Upload" button at the bottom.

INTERNAL ID	ID	NAME	SALES REP	BILLING ADDRESS 1	BILLING ADDRESS 2	BILLING CITY	BILLING STATE/PROVINCE	BILLING ZIP	BILLING COUNTRY
298809	C006383	Anndria Barcelona	-	-	-	-	-	-	-
298811	C006384	Unit B Irrigation & Drainage	Paul Leininger	-	-	-	-	-	-
298854	C006385	MAS Property Holdings LLC	Brooke Marchy	506 Couch St	-	Vallejo	CA	94560	United States
298871	C006386	City of Colusa	Patrick Stern	425 Webster Street	-	Colusa	CA	95932	United States
298902	C006387	FFR Animas, LLC.	-	-	-	-	-	-	-
298903	C006388	Fantastic Farms, LLC	Zachary Scott	1621 E 27th St	-	Los Angeles	CA	90011	United States
298904	C006389	Colusa Golf & Country Club	Patrick Stern	PO Box 827	-	Colusa	CA	95932	United States
298911	C006390	Waybright Orchards	William Martin	21420 Gaines Ln	-	Anderson	CA	96007	United States
298916	C006391	Venter Family Estate	Brooke Marchy	2144 Las Amigas Rd.	-	Napa	CA	94559	United States
298921	C006392	Coastal Vineyard Services	-	-	-	-	-	-	-

Showing 1 to 10 of 100 entries

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## List View

- Users can see the list of all imported customers with sorting & searching capabilities.

This screenshot shows the same customer list interface as the previous one, but with a different set of data. The table rows are identical in structure but contain different customer information. The modal window for "Import Customer" is also present in this view.

INTERNAL ID	ID	NAME	SALES REP	BILLING ADDRESS 1	BILLING ADDRESS 2	BILLING CITY	BILLING STATE/PROVINCE	BILLING ZIP	BILLING COUNTRY
298809	C006383	Anndria Barcelona	-	-	-	-	-	-	-
298811	C006384	Unit B Irrigation & Drainage	Paul Leininger	-	-	-	-	-	-
298854	C006385	MAS Property Holdings LLC	Brooke Marchy	506 Couch St	-	Vallejo	CA	94560	United States
298871	C006386	City of Colusa	Patrick Stern	425 Webster Street	-	Colusa	CA	95932	United States
298902	C006387	FFR Animas, LLC.	-	-	-	-	-	-	-
298903	C006388	Fantastic Farms, LLC	Zachary Scott	1621 E 27th St	-	Los Angeles	CA	90011	United States
298904	C006389	Colusa Golf & Country Club	Patrick Stern	PO Box 827	-	Colusa	CA	95932	United States
298911	C006390	Waybright Orchards	William Martin	21420 Gaines Ln	-	Anderson	CA	96007	United States
298916	C006391	Venter Family Estate	Brooke Marchy	2144 Las Amigas Rd.	-	Napa	CA	94559	United States
298921	C006392	Coastal Vineyard Services	-	-	-	-	-	-	-

Showing 1 to 10 of 100 entries

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## Task List

### Import Task

- Users can import task data from the CSV Master Data sheet.
- When users import master data for a Tasks, we verify the data and will display a notice such as "Please enter valid file" if the data does not match the requirements of file.

The screenshot shows a 'Task List' page with a modal window titled 'Import Task'. The modal contains fields for 'UPLOAD FILE' (with 'CHOOSE FILE' and 'BROWSE' buttons) and an 'Upload' button. The main table has columns for INTERNAL ID, NAME, and DESCRIPTION. The DESCRIPTION column for all rows shows the value 'Automation'. A search bar at the top right is highlighted with a red box.

INTERNAL ID	NAME	DESCRIPTION
5	AU-000	Automation
6	AU-000 : AU-001	Automation
7	AU-000 : AU-002	Automation
8	AU-000 : AU-003	Automation
9	AU-000 : AU-004	Automation
10	AU-000 : AU-005	Automation
11	AU-000 : AU-006	Automation
12	AU-000 : AU-007	Automation
13	AU-000 : AU-008	Automation
14	AU-000 : AU-009	Automation

## List View

- Users can see the list of all imported tasks with sorting & searching capabilities.

The screenshot shows the same 'Task List' page as above, but the search bar at the top right is highlighted with a red box. The rest of the interface is identical to the first screenshot.

## Vendor List

### Import Vendor

- Users can import vendor data from the CSV Master Data sheet.
- When users import master data for a Vendor, we verify the data and will display a notice such as "Please enter valid file" if the data does not match the requirements of file.

The screenshot shows a vendor management system interface. At the top right, there's a user profile for "James Peter" with a small photo. Below the header, the title "Vendor List" is displayed. A search bar and a "Import Vendor" button are visible. The main area is a table with columns for "INTERNAL ID" and "NAME". The table lists various vendor names such as "Lorenzo's Portable Welding", "AG Personnel Management", etc. A modal window titled "Import Vendor" is overlaid on the table. This modal contains fields for "UPLOAD FILE" (with a "CHOOSE FILE" button) and "BROWSE", and a purple "Upload" button at the bottom.

## List View

- Users can see the list of all imported vendors with sorting & searching capabilities.

This screenshot is similar to the one above, showing the "Vendor List" page. The "INTERNAL ID" column is highlighted with a red border. The search bar at the top right is also highlighted with a red border. The rest of the interface, including the table of vendor names and the import modal, appears identical to the first screenshot.

## Opportunity List

### Import Opportunity

- Users can import opportunity data from the CSV Master Data sheet.
- We'll build a search function like in excel.
- When users import master data for a Opportunity, we verify the data and will display a notice such as "Please enter valid file" if the data does not match the requirements of file.

- We will have option to search/filter by customers (dropdown, auto populate from master), stages, last update (date range picker)

The screenshot shows a list of opportunities with columns for Internal ID, Customer, Estimation Process, Document Number, Designer, Estimator, Pump & Electrical Designer, Design/Estimination Notes, Created Date, Last Updated Date, and Actions. A modal window titled 'Import Opportunity' is open, containing fields for 'UPLOAD FILE' and 'CHOOSE FILE' with a 'BROWSE' button, and a 'Upload' button.

INTERNAL ID	CUSTOMER	ESTIMATION PROCESS	DOCUMENT NUMBER	DESIGNER	ESTIMATOR	PUMP & ELECTRICAL DESIGNER	DESIGN/ESTIMATION NOTES	CREATED DATE	LAST UPDATED DATE	ACTIONS
950676	Steven Roland-Old	Labor List	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	02/06/2023	02/06/2023	
956134	Joseph Turner	Task Mapping	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	11/06/2024	11/06/2024	
1101294	Paul Leimgruber	Upload CAD File	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	24/05/2024	24/05/2024	
1194272	Brooke Marchy	Proposal Final Documents	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	10/06/2024	10/06/2024	
1211476	Brooke Marchy	Proposal Preview	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	28/06/2024	28/06/2024	
1237947	William Martin	Upload CAD File	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	17/01/2024	17/01/2024	
1258901	Brooke Marchy	Material List	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	28/06/2024	28/06/2024	
1271526	Joseph Turner	Proposal Creation	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	01/07/2024	01/07/2024	
1301926	Brooke Marchy	Generate Estimate	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	07/10/2024	07/10/2024	
1301933	Brooke Marchy	Generate Estimate	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	07/10/2024	07/10/2024	

Showing 1 to 10 of 45 entries

## List View

- Users can see the list of all imported opportunities with sorting & searching capabilities.
- Users can open many opportunities on different tab or window by right click on opportunity number or click + cmd.

The screenshot shows a list of opportunities with columns for Internal ID, Customer, Estimation Process, Document Number, Designer, Estimator, Pump & Electrical Designer, Design/Estimination Notes, Created Date, Last Updated Date, and Actions. A modal window titled 'Import Opportunity' is open, containing fields for 'UPLOAD FILE' and 'CHOOSE FILE' with a 'BROWSE' button, and a 'Upload' button.

INTERNAL ID	CUSTOMER	ESTIMATION PROCESS	DOCUMENT NUMBER	DESIGNER	ESTIMATOR	PUMP & ELECTRICAL DESIGNER	DESIGN/ESTIMATION NOTES	CREATED DATE	LAST UPDATED DATE	ACTIONS
950676	Steven Roland-Old	Labor List	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	02/06/2023	02/06/2023	
956134	Joseph Turner	Task Mapping	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	11/06/2024	11/06/2024	
1101294	Paul Leimgruber	Upload CAD File	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	24/05/2024	24/05/2024	
1194272	Brooke Marchy	Proposal Final Documents	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	10/06/2024	10/06/2024	
1211476	Brooke Marchy	Proposal Preview	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	28/06/2024	28/06/2024	
1237947	William Martin	Upload CAD File	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	17/01/2024	17/01/2024	
1258901	Brooke Marchy	Material List	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	28/06/2024	28/06/2024	
1271526	Joseph Turner	Proposal Creation	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	01/07/2024	01/07/2024	
1301926	Brooke Marchy	Generate Estimate	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	07/10/2024	07/10/2024	
1301933	Brooke Marchy	Generate Estimate	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafirm Quote	07/10/2024	07/10/2024	

Showing 1 to 10 of 45 entries

## Redirection

- User can redirect to opportunity stage by clicking on following things
  1. Internal ID

2. Customer
3. View Icon present in Action column

The screenshot shows a table titled "Opportunity List" with columns for Internal ID, Customer, Estimation Process, Document Number, Designer, Estimator, Pump & Electrical Designer, Design/Estimination Notes, Created Date, Last Updated Date, and Actions. The "Actions" column contains icons for viewing, editing, and deleting. A purple box highlights the first row of the table.

INTERNAL ID	CUSTOMER	ESTIMATION PROCESS	DOCUMENT NUMBER	DESIGNER	ESTIMATOR	PUMP & ELECTRICAL DESIGNER	DESIGN/ESTIMATION NOTES	CREATED DATE	LAST UPDATED DATE	ACTIONS
950676	Steven Roland-Old	Labor List	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim Quote	02/06/2023	02/06/2023	
956114	Joseph Turner	Task Mapping	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim Quote	11/06/2024	11/06/2024	
1101294	Paul Leimgruber	Upload CAD File	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim Quote	24/05/2024	24/05/2024	
1194272	Brooke Marchy	Proposal Final Documents	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim Quote	10/06/2024	10/06/2024	
1211476	Brooke Marchy	Proposal Preview	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim Quote	28/06/2024	28/06/2024	
1237947	William Martin	Upload CAD File	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim Quote	17/01/2024	17/01/2024	
1258901	Brooke Marchy	Material List	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim Quote	28/06/2024	28/06/2024	
1271526	Joseph Turner	Proposal Creation	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim Quote	01/07/2024	01/07/2024	
1301926	Brooke Marchy	Generate Estimate	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim Quote	07/10/2024	07/10/2024	
1301933	Brooke Marchy	Generate Estimate	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim Quote	07/10/2024	07/10/2024	

## View Documents

- Users can view the list of all uploaded documents across all 8 stages.
- If opportunity reach to 7 stage, we display icon to view four documents of stage 8 (Print Proposal, New Material Master data,Costs Variances, Netsuite Extracts)

The screenshot shows a table titled "Opportunity List" with columns for Internal ID, Customer, Estimation Process, Document Number, Designer, Estimator, Pump & Electrical Designer, Design/Estimination Notes, Created Date, Last Updated Date, and Actions. A purple box highlights the "Opportunity Documents" modal, which lists three documents: File1 (Labor List), File2 (Task Mapping), and File3 (Material List). A "OK" button is visible in the bottom right corner of the modal.

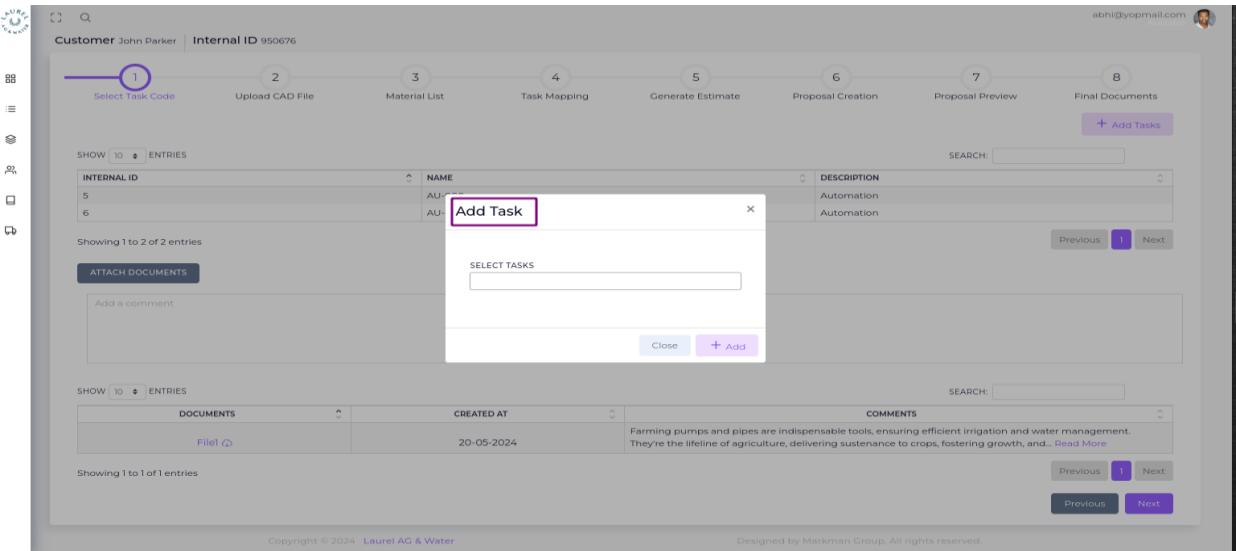
INTERNAL ID	CUSTOMER	ESTIMATION PROCESS	DOCUMENT NUMBER	DESIGNER	ESTIMATOR	PUMP & ELECTRICAL DESIGNER	DESIGN/ESTIMATION NOTES	CREATED DATE	LAST UPDATED DATE	ACTIONS
950676	Steven Roland-Old	Labor List	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim	02/06/2023	02/06/2023	
956114	Joseph Turner	Task Mapping	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim	11/06/2024	11/06/2024	
1101294	Paul Leimgruber	Upload CAD File	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim	24/05/2024	24/05/2024	
1194272	Brooke Marchy	Proposal Final Document	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim	10/06/2024	10/06/2024	
1211476	Brooke Marchy	Proposal Preview	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim	28/06/2024	28/06/2024	
1237947	William Martin	Upload CAD File	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim	17/01/2024	17/01/2024	
1258901	Brooke Marchy	Material List	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim	28/06/2024	28/06/2024	
1271526	Joseph Turner	Proposal Creation	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim	01/07/2024	01/07/2024	
1301926	Brooke Marchy	Generate Estimate	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim	07/10/2024	07/10/2024	
1301933	Brooke Marchy	Generate Estimate	OPPLAW-002114	Josh Hansen	Samuel Etchison	-	7/10 Waiting on Netafim	07/10/2024	07/10/2024	

## Estimation process

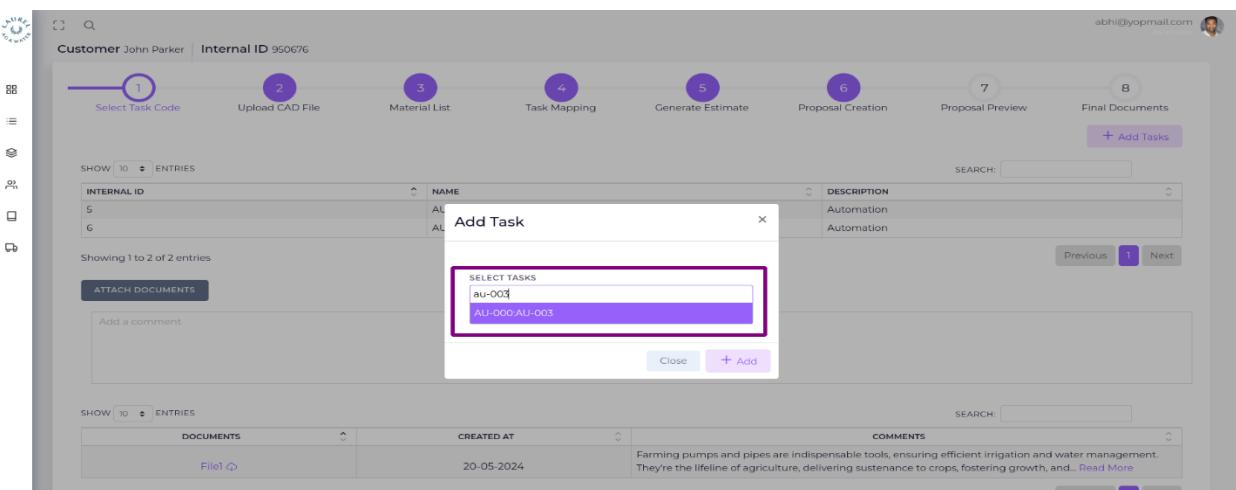
- To move on to the next stage the user will have to complete the current stage.
- Users can move to any tab any time if stage that stage completed.

## Select Task Code

- Users can add task based on imported Task



- Users can search task by task name and description while add task.



The screenshot shows the software's interface for the 'Select Task Code' stage. At the top, there are eight numbered steps: 1. Select Task Code, 2. Upload CAD File, 3. Material List, 4. Task Mapping, 5. Generate Estimate, 6. Proposal Creation, 7. Proposal Preview, and 8. Final Documents. Step 1 is highlighted with a purple circle. Below the steps, there is a search bar and a user profile for 'abhil@yopmail.com'. The main area shows a table of tasks with columns for Internal ID, Name, and Description. A modal window titled 'Add Task' is open, showing a list of tasks with 'automation' and 'AU-000' selected. Below the tasks, there is a section for 'ATTACH DOCUMENTS' and a comment input field. Further down, there are tables for 'DOCUMENTS' and 'COMMENTS'.

- Users can see all added tasks into tabular format.
- Users can upload a document that is relevant to stage 1 Select Tasks Code.
- Users can see all the uploaded documents of the stage 1 Select Tasks Code in the Document table.

The screenshot shows the software's interface for the 'Upload CAD File' stage. At the top, there are eight numbered steps: 1. Select Task Code, 2. Upload CAD File, 3. Material List, 4. Task Mapping, 5. Generate Estimate, 6. Proposal Creation, 7. Proposal Preview, and 8. Final Documents. Step 2 is highlighted with a purple circle. Below the steps, there is a search bar and a user profile for 'abhil@yopmail.com'. The main area shows a table of documents and a table of comments. A modal window titled 'Upload CAD File' is open, showing a file selection dialog with 'File1' selected. Below the modal, there is a section for 'ATTACH DOCUMENTS' and a comment input field. Further down, there are tables for 'DOCUMENTS' and 'COMMENTS'.

## Upload CAD File

- Users can upload CAD file.
- Users can skip this stage if they want.
- Based on the uploaded CAD file, data from the CAD file will be extracted.
- Users can *upload a document* that is relevant to stage 2 *Upload CAD File*.

- Users can see all the uploaded documents of the *stage 2 Upload CAD File* in the *Document table*.

The screenshot shows a software interface for managing CAD files. At the top, there's a navigation bar with icons for search, user profile (abhi@yopmail.com Available), and other account details. Below the bar, a header displays "Customer John Parker | Internal ID 950676". A horizontal progress bar at the top indicates the workflow steps: 1. Select Task Code, 2. Uploaded CAD File, 3. Material List, 4. Task Mapping, 5. Generate Estimate, 6. Proposal Creation, 7. Proposal Preview, and 8. Final Documents. Step 2 is highlighted with a purple background.

The main area features a large input field with a dashed border for dropping files, labeled "Drop files here to upload". Below this is a purple "UPLOAD" button. Underneath the input field is a section titled "ATTACH DOCUMENTS" with a "Add a comment" text area. At the bottom of the screen is a table with columns for "DOCUMENTS", "CREATED AT", and "COMMENTS". The table includes sorting and filtering options ("SHOW 10 ENTRIES", "SEARCH:"). A footer at the bottom contains copyright information ("Copyright © 2024 Laurel AG & Water") and credits ("Designed by Markman Group, All rights reserved.").

## Material List

- Material List
  - Material list will be generated by *extracting the CAD file*.
  - To generate Material List data, we will utilize the combination of below macros:
    1. [Reset For New Material List](#)
    2. [Split List Macro](#)
  - Users can see the Material List with *sorting and searching* capabilities.

**Customer** John Parker | Internal ID 950676

1 Select Task Code   2 Upload CAD File   3 Material List   4 Task Mapping   5 Generate Estimate   6 Proposal Creation   7 Proposal Preview   8 Final Documents

**Material List**

QUANTITY	DESCRIPTION	ITEM NUMBER
1	CAP S40 2"	447020
1	FLUSHOUT DRIP ABOVE 2"	1100-001000
2	NELSON VLV 2" CR 18-80 PR	6350-001550
2	VENT-1CAV X 2"COUP	ASSM-0625
3	TEE S40 2"	401020
6	ELBOW S40 2" X 45	417020
15	ELBOW S40 2" X 90	406020
20	PIPE PVC IPS S40 2" SW	5400-027000
63	SADDLE 1/2" X 2"	2800-105000
64	PERMA-LOC X SWIVEL-W TEE 062	2800-006000

Showing 1 to 10 of 19 entries

Glue & Additional Material

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- **Glue & Additional Material**
  - To calculate the data of Glue & Additional Material section, below macro will be used:
    1. *Run Miscellaneous Material*
  - Users can see the Glue & Additional Material list with *sorting and searching* capabilities.

**Customer** John Parker | Internal ID 950676

1 Select Task Code   2 Upload CAD File   3 Material List   4 Task Mapping   5 Generate Estimate   6 Proposal Creation   7 Proposal Preview   8 Final Documents

**Material List**

**Glue & Additional Material**

QUANTITY	DESCRIPTION	ITEM NUMBER	CATEGORY
1	Cement -711 Heavy Gray, Gallon	4200-001600	#N/A
1	Cement - Primer Purple P70 Gal	4200-007500	GLU020
1	SURVEY FLAGS GLO OPA 21" WIRE	3600-004500	FSO020
2	Cement -719 Extra Heavy Gray, Quart	4200-002500	GLU010
2	CEMENT - RED HOT CLEAR, PINT	4200-005000	GLU010
2	CEMENT - RED HOT CLEAR, PINT (HOSE FITTINGS)	4200-005000	FHO
2	Cement - Dauber for Pint Can (HOSE FITTINGS)	4200-015000	FHO
2	COUPLER S40 2"	429020	FMP429
3	CUT PIPE PVC S40 2" x 48"	5400-031120	PIP010
4	Cement - Dauber for Pint Can	4200-015000	GLU040

Showing 1 to 10 of 21 entries

Preliminary material list

- **Preliminary material list**
  - To calculate the data of Final Material List, below macro will be used:
    1. *Import Material From Previous Tabs*

## 2. FINALIZE MATERIAL

- Users can see the Final Material List with *sorting and searching* capabilities.

The screenshot shows the 'Material List' stage of a workflow. At the top, there are three purple circles labeled 1, 2, and 3, which are highlighted with a purple box. Below them is a horizontal timeline with numbered steps 4 through 8. Step 3 is also highlighted with a purple box. The main area displays a table titled 'Preliminary material list'. The table has columns for IRRICAD IMPORTED QUANTITIES, GLUE & ADDITIONAL MTL QUANTITIES, COMBINED QUANTITIES FROM BOTH IMPORTS, DESCRIPTION, ITEM NUMBER, CATEGORY, and BAC/BUNDLE QUANTITY. The table contains several rows of data, such as 'Cement - Dauber for Pint Can (HOSE FITTINGS)' and 'MALE HOSE ADAP X 1/2"(3/4"SP)'. A search bar is located at the top right of the table area. At the bottom of the table, there are 'Previous' and 'Next' buttons.

- All above 3 sections feature *collapsible functionality to minimize vertical scrolling*.
- Users can *upload a document* that is relevant to stage 3 Material List.
- Users can see all the uploaded documents of the stage 3 Material List in the *Document table*.

The screenshot shows the 'Material List' stage. The top navigation bar includes a search icon, customer information ('Customer John Parker | Internal ID 950676'), and a user profile ('abhi@yopmail.com Available'). Below the navigation is a horizontal timeline with steps 1 through 8. Step 3 is highlighted with a purple box. The main content area features three collapsed sections: 'Material List', 'Glue & Additional Material', and 'Preliminary material list'. Under 'Preliminary material list', there is a 'ATTACH DOCUMENTS' button. Below it is a text input field for 'Add a comment'. The bottom half of the screen displays a 'DOCUMENTS' table. The table has columns for DOCUMENTS, CREATED AT, and COMMENTS. It shows one entry: 'File1' was created on '20-05-2024' with a comment about farming pumps and pipes. At the bottom, there are 'Previous' and 'Next' buttons.

# Task Mapping

- Users can assign products to specific tasks by clicking on the Assign Product button.
- Clicking this button opens a popup with all extracted products.

The screenshot shows a software application window titled 'Customer John Parker | Internal ID 950676'. At the top, there is a navigation bar with steps 1 through 8: 'Select Task Code', 'Upload CAD File', 'Material List', 'Task Mapping' (which is highlighted), 'Generate Estimate', 'Proposal Creation', 'Proposal Preview', and 'Final Documents'. Below the navigation bar, there is a table with columns 'Task No', 'Description', and 'Quantity'. A modal window titled 'Assign Products' is open over the table. This modal contains a table with columns 'Combined Quantities', 'Description', and 'Item Number'. The 'Combined Quantities' column has a checkbox. There are several rows of products listed, each with a checkbox in the first column. At the bottom of the modal are 'Close' and 'Save' buttons. To the right of the modal, there is a table with columns 'Units', 'Unit Price', 'Cost', 'Sell', and 'Gross Profit'. The 'Cost' and 'Sell' sections have sub-sections for 'Total', 'Sell', and '\$'. The 'Gross Profit' section has sub-sections for '%', 'Ent', 'Er', 'Enl', 'Er', 'E', and '+'. The 'Cost' section shows values \$4,124 and 2,750. The 'Sell' section shows values 13.83 and 3.83. The 'Gross Profit' section shows values 20 and 20. There are also red delete icons next to some of the rows in the 'Cost' and 'Sell' tables.

- Users see all products as marked by default.
- Users can select and unselect products with dragging feature.
- After assigning a particular product to any task than that product will not appear in assign task listing.
- Users can add a new task by clicking the *Add Task* button.
- Clicking this button opens a popup with all necessary fields to add a new task.
- Users can search and select *Task No* based on *imported Task*.
- Users change some field here they automatically change into previous stage.
- In the Individual tasks section:
  - Users have the option to add multiple products.
  - This opens a popup where users can input the number of product rows needed.
  - Each product row includes predefined data based on assigned products.
  - Users only need to enter the *Vendor Quoted Cost*, select which vendor quoted that cost, and the selling cost.
  - If there is a discrepancy between the *Vendor Quoted Cost* and the *Standard Cost*, the *Vendor Quoted Cost* field will display with a red border and accompanying text.
- Users can see the labor row at the last group of Task Mapping.
- Users can *delete specific products* from rows by clicking on the *the delete icon*.
- Users can minimize and maximize a particular row by clicking the arrow.

- Users can add a new row by clicking the plus button of a given extra row.

Customer John Parker | Internal ID 950676

Task Mapping

Task No	Description	Total	Percent of Total	Quantity	Units	Unit Price
Select Task Code	Underground	\$0.00	0.00	0	EA	\$0.00
AU-000						
AU-001 : AU-001						
AU-001 : AU-002						
AU-002 : AU-003						

+ Add Product

Project Product Information

No	Quantity	Item Code	Description	Standard Cost	Vendor Quoted cost	Vendor	Comment	Total	Sell	Total	\$	%
1	75	2800-117500	Ball Valve Riser 3/4" FHTxMHT	54.124		Select Vendor Name	Enter cc	54.124	6	13.83	20	20
2	175	2800-118500	FIGURE 8 062	12.750		Select Vendor Name	Enter cc	12.750	0	15.56	3.83	20
		Enter C	2800-118501	Ball Valve Riser 3/4" FHTxMHT	Enter S	Enter	Select Vendor Name	Enter cc	Enti	Er	Ent	Er

+ Add Product

Assign Product

- Users can search and select for item code and description.

Customer John Parker | Internal ID 950676

Task Mapping

Task No	Description	Total	Percent of Total	Quantity	Units	Unit Price
Select Task Code	Underground	\$0.00	0.00	0	EA	\$0.00

+ Add Product

Project Product Information

Sr No	Quantity	Item Code	Description	Standard Cost	Vendor Quoted cost	Vendor	Comment	Total	Sell	Total	\$	%
1	75	2800-117500	Ball Valve Riser 3/4" FHTxMHT	54.124		Select Vendor Name	Enter cc	54.124	6	13.83	20	20
2	175	2800-118500	FIGURE 8 062	12.750		Select Vendor Name	Enter cc	12.750	0	15.56	3.83	20
		Enter C	2800-118501	Ball Valve Riser 3/4" FHTxMHT	Enter S	Enter	Select Vendor Name	Enter cc	Enti	Er	Ent	Er

+ Add Product

Assign Product

- Users can assign labor to specific tasks by clicking on the Assign labor button.
- Users can add more labor data by clicking on the Add Labor button.
- Users can delete specific labor from rows by clicking on the delete icon
- Users can minimize and maximize a particular row by clicking the arrow
- Users can add a new row by clicking the plus button of a given extra row.

Customer John Parker | Internal ID 950676

Task Mapping

Task No	Description	Total	Percent of Total	Quantity	Units	Unit Price
Select Task Code	Underground	\$0.00	0.00	0	EA	\$0.00
Au						
AU-000						
AU-001:AU-001						
AU-001:AU-002						
AU-002:AU-003						

Project Product Information

No	Quantity	Item Code	Description	Standard Cost	Vendor Quoted cost	Vendor	Comment	Total	Sell	Gross Profit	
1	75	2800-117500	Ball Valve Riser 3/4" FHTxMHT	54.124		Select Vendor Name	Enter cc	54.124	13.83	20	20
	175	2800-118501	FIGURE 6.042	18.956		Select Vendor Name	Enter cc	12.736	0	18.956	18.956
		Enter C	2800-118501	Enter S	Enter	Select Vendor Name	Enter cc	Enter	Enter	Enter	Enter
							Enter cc	Enter	Enter	Enter	Enter

+ Add Task

+ Add Product Assign Product

Cost

Total \$ 15,550.00

90

Previous Next

- Users can search and select *labor tasks and description*.

Customer John Parker | Internal ID 950676

Task Mapping

1	2	3	4	5	6	7	8
Select Task Code	Upload CAD File	Material List	Task Mapping	Generate Estimate	Proposal Creation	Proposal Preview	Final Documents
Underground							
Dauber for Pint Can							
Air Vent Assembly							

Total \$ 15,550.00

90

Underground \$ 0.00

+ Add labor Assign Labor

Project Labor Information

Sr No	Labor task	Description	Quantity	Local Cost	Out Of Town cost	Comment	Total	Sell	Gross Profit			
1	Air Vent Assembly	Per Vent	75	35.00	35.00	Enter cc	5.00	11.85	0.9	64.124	13.83	20
2	Air Vent Installation	Per Vent	75	35.00	35.00	Enter cc	5.00	11.85	0.9	64.124	13.83	20

Air Vent Assembly Select description Name Enter C Ent Ent Enter cc En Er En Entr E E +

Total \$ 15,550.00

90

Air Vent Assembly  
Air Vent Installation  
Automation: Backflush, Clock, Injector

ATTACH DOCUMENTS

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Previous Next

- Users can upload a document that is relevant to stage 4 Task Mapping.
- Users can see all the uploaded documents of the stage 4 Task Mapping in the Document table.

The screenshot shows the Estimate Management System's Task Mapping stage. The timeline at the top has 8 steps: 1. Select Task Code, 2. Upload CAD File, 3. Material List, 4. Task Mapping, 5. Generate Estimate, 6. Proposal Creation, 7. Proposal Preview, and 8. Final Documents. Step 4 is highlighted. Below the timeline is a table for 'Task Mapping' showing two tasks: 'Air Vent Assembly' and 'Air Vent Installation'. The table includes columns for No, Labor Task, Description, Quantity, Cost, Comment, Total, Sell, Total \$, %, and various buttons for editing. A total cost of \$15,550.00 is displayed. Below the table is an 'ATTACH DOCUMENTS' section with a comment input field. At the bottom is a document viewer showing a single file named 'File1.pdf' created on 20-05-2024.

## Generate Estimate

- Users can view all the estimation details, which are shown with a collapse function for easy access.
- Users can view the estimation data and sort them; this data comes from the Task Mapping stage.
- Users can check the KPIs like *Total Cost*, *Total Sale*, *Total GP* & *GP% Indirect*.
- On the change of *Labor GP %*, *Mat GP %* and *S & H* column data by user, above KPIs will change.

The screenshot shows the Estimate Management System's Generate Estimate stage. The timeline at the top has 8 steps: 1. Select Task Code, 2. Upload CAD File, 3. Material List, 4. Task Mapping, 5. Generate Estimate, 6. Proposal Creation, 7. Proposal Preview, and 8. Final Documents. Step 5 is highlighted. Below the timeline are four large colored boxes displaying KPIs: Total Cost (\$29,746.95), Total Sale (\$37,548.13), Total GP (\$6971.88), and GP% Indirects (15.56%). Below these are sections for 'View Full Table' and 'View Full Table (Advanced)'. The 'View Full Table' section contains a table with multiple rows of data, each with columns for Task ID, Description, Quantity, Unit, Cost, and various financial metrics. The 'View Full Table (Advanced)' section is a more detailed version of the same table, showing more columns and rows of data. Navigation buttons 'Previous' and 'Next' are at the bottom right of both tables.

- Users can view labor data with light background color.
- If the user can update field value here that will be change automatically on previous stage.
- Users can view the breakdown of each cost by clicking on any KPIs.

The screenshot shows a software interface for estimating costs. At the top, there's a navigation bar with steps 1 through 8: 'Select Task Code', 'Upload CAD File', 'Material List', 'Task Mapping', 'Generate Estimate', 'Proposal Creation', 'Proposal Preview', and 'Final Documents'. Below this, there are three large KPI boxes: 'Total Cost' (\$29,746.95), 'Total Sale' (\$37,548.73), and 'GPI% Indirects' (15.56%). In the center, a 'Cost Breakdown' modal is open, listing items like 'Equipment Purchase', 'Consulting Fees', 'Software Licenses', 'Marketing Expenses', and 'Miscellaneous Costs' with their respective amounts. At the bottom of the modal is an 'OK' button. On the left side of the main screen, there's a 'View Full Table' button.

- Users can view estimation data in full screen by clicking on *View Full Table* button.

The screenshot shows a browser window with the URL '127.0.0.1:8000/generate\_estimate\_table'. The page features a large table with many rows of data. The columns include 'TASK CODE', 'BID ITEM DESCRIPTION', 'LABOR COST', 'LABOR GP%', 'LABOR GP \$', 'LABOR SELL', 'MAT. COST', 'MAT.GP%', 'MAT. GP \$', 'MAT. MU', 'SALES TAX', 'S & H', 'MAT. SELL', 'MAT. TAX, LABOR', and 'COMB GP%'. The data in the table represents various construction tasks and their associated costs and materials. The entire table is highlighted with a thick orange border.

- If Users want to modify these estimation data, they can click on Task Code & Bid Item Description, a popup will open, popup will show all the products associated with that Task Code.

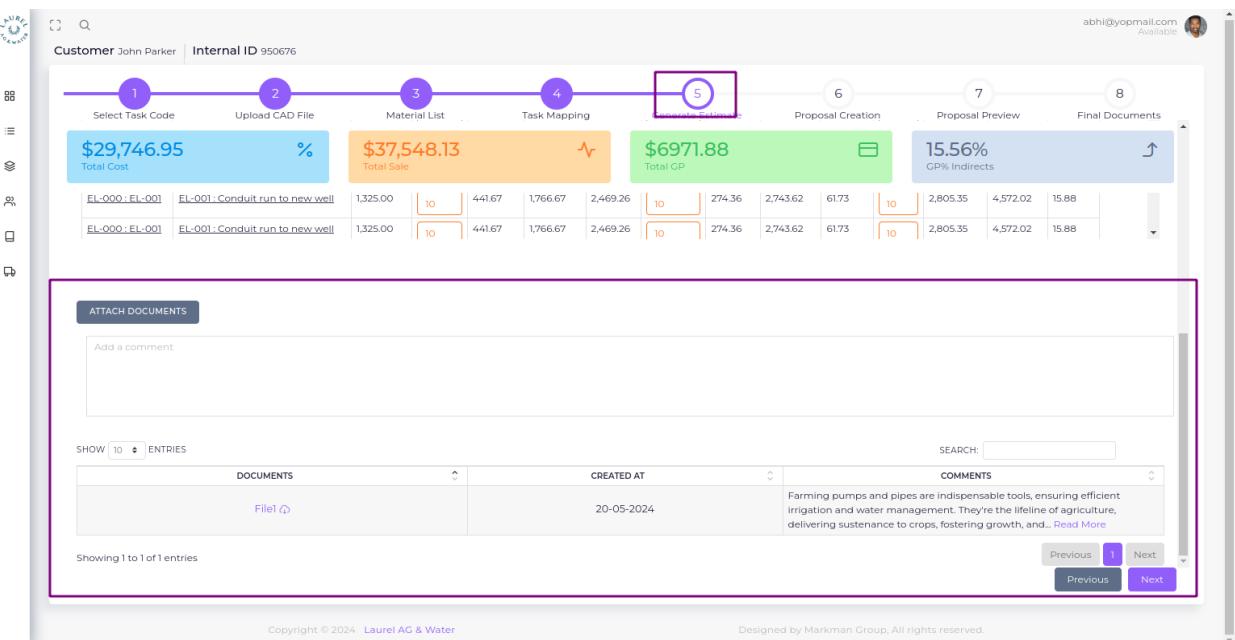
**Products of DR-000 : DR-001**

Project Product Information						Cost	Sell	Gross Profit	
Sr No	Quantity	Item Code	Description	Standard Cost	Quoted cost	Total	Sell	Total \$	%
1	75	2800-117500	Ball Valve Riser 3/4" FHTxMHT	54.124		54.124	64.124	13.83	20
2	175	2800-118500	FIGURE 8 062	12.750		12.750	0.8	15.56	3.83

- Users can upload a document that is relevant to *stage 5 Generate Estimate*.
- Users can see all the uploaded documents of the *stage 5 Generate Estimate* in the Document table.

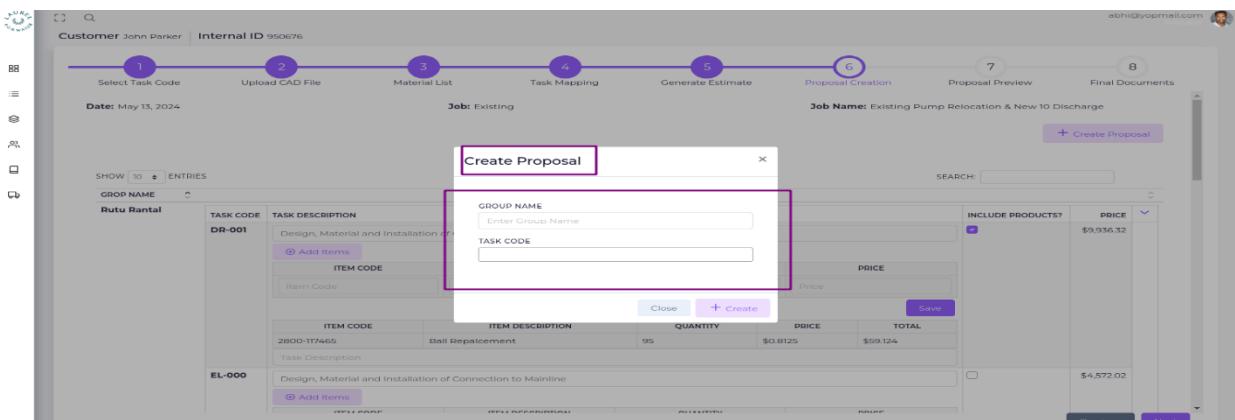
**Products of DR-000 : DR-001**

Project Product Information						Cost	Sell	Gross Profit	
Sr No	Quantity	Item Code	Description	Standard Cost	Quoted cost	Total	Sell	Total \$	%
1	75	2800-117500	Ball Valve Riser 3/4" FHTxMHT	54.124		54.124	64.124	13.83	20
2	175	2800-118500	FIGURE 8 062	12.750		12.750	0.8	15.56	3.83



## Proposal Creation

- Users can create proposal click of *Create Proposal*
- Users must add group name and tasks code; select (multiselect) task code based on stage 5.
- After creating a task group, the user can select only the remaining tasks.
- Users can search task by task name and description while creating proposal.
- Users can edit group name and delete tasks.



Customer John Parker | Internal ID 950676

1 Select Task Code    2 Upload CAD File    3 Material List    4 Task Mapping    5 Generate Estimate    6 Proposal Creation    7 Proposal Preview    8 Final Documents

**Task Summary**

GROUP NAME	TASK CODE	TASK DESCRIPTION	INCLUDE PRODUCTS?	PRICE
Rutu Rental	DR-001	Design, Material and Installation of Connection to Mainline	<input checked="" type="checkbox"/>	\$9,936.32
	EL-000	Design, Material and Installation of Connection to Mainline	<input type="checkbox"/>	\$4,572.02

**DR-001** Design, Material and Installation of Connection to Mainline

**EL-000** Design, Material and Installation of Connection to Mainline

**ITEM CODE**    **ITEM DESCRIPTION**    **QUANTITY**    **PRICE**    **TOTAL**

2800-117465	Ball Repalcement	95	\$0.8125	\$59.124
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Task Description

**Save**

**ITEM CODE**    **ITEM DESCRIPTION**    **QUANTITY**    **PRICE**

Item Code	Item Description	Quantity	Price
-----------	------------------	----------	-------

**Save**

**Previous**    **Next**

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Customer John Parker | Internal ID 950676

1 Select Task Code    2 Upload CAD File    3 Material List    4 Task Mapping    5 Generate Estimate    6 Proposal Creation    7 Proposal Preview    8 Final Documents

Date: May 13, 2024    Job: Existing    Job Name: Existing Pump Relocation & New 10 Discharge

**Create Proposal**

GROUP NAME: Enter Group Name

**TASK CODE**

Au-004  
AU-000-AU-004

**ITEM CODE**    **ITEM DESCRIPTION**    **QUANTITY**    **PRICE**    **TOTAL**

2800-117465	Ball Repalcement	95	\$0.8125	\$59.124
-------------	------------------	----	----------	----------

Task Description

**Save**

**ITEM CODE**    **ITEM DESCRIPTION**    **QUANTITY**    **PRICE**

Item Code	Item Description	Quantity	Price
-----------	------------------	----------	-------

**+ Create**

**Close**

The screenshot shows a software interface for managing opportunities. At the top, there's a navigation bar with icons for back, forward, search, and update. Below it, a header displays 'Customer John Parker | Internal ID 950676' and the date 'May 13, 2024'. A progress bar at the top indicates the workflow stages: 1. Select Task Code, 2. Upload CAD File, 3. Material List, 4. Task Mapping, 5. Generate Estimate, 6. Proposal Creation (highlighted with a purple box), 7. Proposal Preview, and 8. Final Documents. The 'Job Name' is listed as 'Existing Pump Relocation & New 10 Discharge'. A sidebar on the left shows a list of entries under 'Rutu Rental'. In the center, a 'Create Proposal' modal is open, showing a table of tasks. The table has columns for Task Code, Task Description, Item Code, Item Description, Quantity, Price, and Total. A specific task row for 'AU-000-AU-002' is highlighted with a purple box.

- Users can view details of Proposal with grouping of tasks; with entered group name.
- Users can view the products coming from the Generate Estimate stage in the task wise manner.
- Users can minimize and maximize row by arrow.
- Users can change the *task title & task description* as per their need.
- Users can add items in any task by clicking on the *Add Task* button.

This screenshot shows the same software interface as the previous one, but the 'Proposal Creation' stage is now completed. The progress bar shows the workflow has moved to stage 7 ('Proposal Preview') and stage 8 ('Final Documents'). The 'Create Proposal' modal is still open, showing the grouped tasks. A purple box highlights the 'Task Summary' section above the table. Another purple box highlights the 'Task Description' column in the table, which contains the text 'Design, Material and Installation of Connection to Mainline'.

- Users can upload a document that is relevant to *stage 6 Proposal Creation*.
- Users can see all the uploaded documents of the *stage 6 Proposal Creation* in the Document table.

Customer John Parker | Internal ID 950676

Task Description

Task Description	Item Code	Item Description	Item Quantity	Item Price	Task Total
FRT : Freight				\$500.00	\$30303.41

TOTAL ESTIMATE - ITEMS LISTED : \$30303.41

SHOW: 10 ENTRIES

SEARCH:

DOCUMENTS

CREATED AT

COMMENTS

Farming pumps and pipes are indispensable tools, ensuring efficient irrigation and water management. They're the lifeline of agriculture, delivering sustenance to crops, fostering growth, and... [Read More](#)

File1

20-05-2024

Showing 1 to 1 of 1 entries

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## Proposal Preview

- Users can view all the details filled of *previous stages* in the *Proposal Preview stage*.
- Users can modify details like
  - Group Name
    1. Task Code
    2. Task Description
    3. Item Code
    4. Item Description
    5. Item Quantity
    6. Item Price
    7. Item Total
    8. Task Total
- Users can edit group names and delete tasks.

**EXHIBIT A - PROJECT DETAIL**  
# INV-001001

**Date:** May 13, 2024  
**Job:** Existing  
**Job Name:** Existing Pump Relocation And New 10" Discharge

Group Name	Task Code	Task Summary				Total
Rental New	DR-001	Design, Material and Installation of Connection to Mainline				\$9,936.32
		Item Code	Item Description	Quantity	Price	Total
		2800-117465	Ball Replacement	95	\$0.8125	\$59124
		- Connection From 10" Discharge to Existing 15" Mainline				
		- Excavation and Connection with 10" PVC From New Discharge to 15" Mainline With Repair Coupler and Tee				

**Previous** **Next**

- Users can *check all the mentioned terms and conditions.*
- Users can *modify terms and conditions* as per their need.
- Users can *delete and add terms and conditions* as per their need.

**Customer John Parker | Internal ID 950676**

**Select Task Code** **2** **Upload CAD File** **3** **Material List** **4** **Task Mapping** **5** **Generate Estimate** **6** **Proposal Creation** **7** **Proposal Preview** **8** **Final Documents**

Repair of the road crossing not included.

Trench compaction not included.

All existing irrigation & utility lines to be located & exposed by the customer.

The customer is responsible for any materials delivered by Laurel Ag & Water, or its suppliers, and stored on the job site. Customer shall indemnify and hold Laurel Ag & Water harmless for any losses or damages.

Preliminary Notice to be furnished to Landowner, Contractor, and Lender (if applicable).

Any alteration or deviation from the contract specifications will become an additional charge over and above the original price.

Preliminary Notice to be furnished to Landowner, Contractor, and Lender (if applicable).

Write Here

**PUMP INSTALLATION TERMS**

This proposal does not include utility connection fees.

Concrete pad to be provided by Customer.

Tank plumbing and connection not included.

Labor to remove existing pump and install new pump included.

Labor to install new pump is included.

Verification on well log/pump test is not included.

**Previous** **Next**

Preliminary Notice to be furnished to Landowner, Contractor, and Lender (if applicable).

Write Here

**PUMP INSTALLATION TERMS**

- This proposal does not include utility connection fees.
- Concrete pad to be provided by Customer.
- Tank plumbing and connection not included.
- Labor to remove existing pump and install new pump included.
- Labor to install new pump is included.
- Verification on well log/pump test is not included.
- Customer to provide power to operate system.
- This quote is based on connection to an existing pump panel and electrical service.
- Proposal does not include any permits if required. Owner/Manager is responsible for obtaining all permits.
- This price does not include new electrical service, meter main, permit, or inspection if required.
- Cave-in due to unstable ground will require additional labor.
- Sub-surfaces not free of obstructions, obstacles, or unusual conditions of any kind including, by way of example and not limited to, high water table, mud, large and/or excessive rock, roots, water, or utility lines.

[Previous](#) [Next](#)

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- Users can *check & modify Sales & Approval Agreement*.

Write here

**SALES AND APPROVAL AGREEMENT**

This Agreement is made and entered on \_\_\_\_\_, by and between Laurel Ag & Water ("Seller") and Martha Waterman, ("Buyer"), (collectively referred to as the "Parties").

The Parties agree as follows:

SELLER AGREES TO SELL and Buyer agrees to buy all material and services more fully described in the attached Exhibit A, "Project Detail" (the "Goods"), Job #Exist.

BUYER SHALL PAY SELLER \$37,498 for the Goods, the "Purchase Price". Buyer shall make an initial deposit of 30% of the Purchase Price in the amount of \$11,249 for Seller to secure materials. Buyer shall make a second

THE BUYER SHALL PAY THE PURCHASE PRICE, less the initial deposit, upon the completion of the job, or upon receipt of invoice, whichever is first. Buyer agrees to pay 1.5% monthly interest (18% annual rate) on any unpaid balance.

SELLER SHALL DELIVER the Goods to Buyer at the following address or parcel number: \_\_\_\_\_. At that time, Buyer has the right to inspect the Goods. Buyer must give notice to Seller of any defect, damage or shortage within 10 days of delivery.

PRELIMINARY NOTICE will be furnished to the Landowner, Contractor and Lender.

ANY CHANGES OR ADDITIONS made to the original Project Detail including the charges associated with them will subsequently be referred to as "Change Order(s)" and/or "Addition Order(s)" and become part of this Agreement.

BUYER AGREES that the design and specifications as described in the Project Detail are accurate and will be governed by the remaining terms of this Agreement.

IN WITNESS WHEREOF, the parties have caused this Agreement to be executed the day and year first above written.

[Previous](#) [Next](#)

- Users can fill *Buyer/Seller details* like
  - Buyer/Seller Name
  - Date
- Users can fill in *Deposit Invoice details* like.
  - Customer
  - Date
  - Job
  - To
  - Ranch Name
  - Job Name

Customer John Parker | Internal ID 950676

1 2 3 4 5 6 7 8

Select Task Code Upload CAD File Material List Task Mapping Generate Estimate Proposal Creation Proposal Preview Final Documents

Buyer: Date: Seller: Date:

Enter Buyer Enter Date Enter Seller Enter Date

Lochlan Buckingham

Enter Name Enter Name

Sales Consultant

Enter Position Enter Position

**DEPOSIT INVOICE**

Customer: Enter Customer

Date: May 13, 2024 Job: Existing

To: Martha Waterman 2241 Old Airline Highway Paicines Ca 95043 Ranch Name: Enter Ranch Name

Job Name: Existing Pumps Replacement And New 10" Discharge

Previous Next

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- Users can upload a document that is relevant to *stage 7 Proposal Preview*.
- Users can see all the uploaded documents of the *stage 7 Proposal Preview* in the Document table.

Customer John Parker | Internal ID 950676

1 2 3 4 5 6 7 8

Select Task Code Upload CAD File Material List Task Mapping Generate Estimate Proposal Creation **Proposal Preview** Final Documents

TAX RATE: 0%  
SALES TAX: \$0.00  
OTHER: Enter Other value  
TOTAL: \$11,249.44

THANK YOU FOR YOUR BUSINESS!

ATTACH DOCUMENTS

Add a comment

SHOW 10 ENTRIES

DOCUMENTS	CREATED AT	COMMENTS
File1	20-05-2024	Farming pumps and pipes are indispensable tools, ensuring efficient irrigation and water management. They're the lifeline of agriculture, delivering sustenance to crops, fostering growth, and... <a href="#">Read More</a>

Showing 1 to 1 of 1 entries

Previous 1 Next  
Previous Next

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## Final Documents

- Users have the option to *print the Proposal of stage 7 Proposal Preview.*
- User can *Download CSV* of
  - New Material Master Data
    1. Users can *download the CSV file of products which are not in Product Master data.*
      - a. New Material Master Data file columns
        - i. Material Description
        - ii. Cost
        - iii. Vendor Quoted Price
        - iv. Vendor Name
    - Cost Variances
      - a. Users can *download the CSV file of products which have Vendor Quoted price.*
      - b. Cost Variances file columns
        - i. Item Code
        - ii. Standard Cost
        - iii. Vendor Quoted Cost
        - iv. Vendor Name
    - NetSuite Extract
      - a. Users can *download the CSV file of products in NetSuite format.*
      - b. NetSuite Extract file columns
        - i. InternalID
        - ii. Task
        - iii. Quantity
        - iv. Description
        - v. PartNumber
- Users can upload a document that is relevant to *stage 8 Final Documents.*
- Users can see all the uploaded documents of the *stage 8 Final Documents* in the Document table.

The screenshot displays a software application interface with a purple header bar. On the left, there's a sidebar with icons for file management, search, and user profile (abhi@yopmail.com, available). The main area shows a customer record for John Parker (Internal ID 950676) with a timeline of steps:

- Step 1: Select Task Code (highlighted with a purple box)
- Step 2: Upload CAD File
- Step 3: Material List
- Step 4: Task Mapping
- Step 5: Generate Estimate
- Step 6: Proposal Creation
- Step 7: Proposal Preview
- Step 8: Final Documents (highlighted with a purple box)

Under Step 1, there are four buttons:

- Proposal (purple button)
- ↓ New Material Master Data (light blue button)
- ↓ Costs Variances (light blue button)
- ↓ NetSuite Extract (green button)

A large central box contains:

- ATTACH DOCUMENTS** button
- An input field for "Add a comment".
- A table titled "SHOW 10 ENTRIES" with columns: DOCUMENTS, CREATED AT, and COMMENTS.
- The table has one entry: File1 (document icon), created on 20-05-2024. The COMMENT column contains: Farming pumps and pipes are indispensable tools, ensuring efficient irrigation and water management. They're the lifeline of agriculture, delivering sustenance to crops, fostering growth, and... [Read More](#).
- Pagination controls: Previous, 1, Next.
- Buttons: Previous, Submit.

At the bottom, the footer includes:

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