

ROBINS & MORTON

OP-010.1 – Estimate Number Request Procedure

Updated 08/27/24

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Unanet Login

Estimate numbers are assigned using Unanet. If you do not have a Unanet account, email Adria Klein and she will add you to Unanet.

Login Instructions Email

You should receive an email that your Unanet User Account was activated and instructions on logging into Unanet through HUB with single sign-on. Your login instructions will be sent in a separate email with a link to create a password for your account.

Hi

Your Unanet user account was activated, and login instructions were sent in a separate email.

You can also access Unanet with single sign-on through [HUB](#). Please see the Unanet link at the top of the main page and also on the Marketing page. If you click the link you will be asked to sign in with your Robins & Morton login, which will automatically log you into Unanet without a separate login. Please let me know if you have any issues or questions or if you would like an overview of Unanet.

Access Unanet through Hub

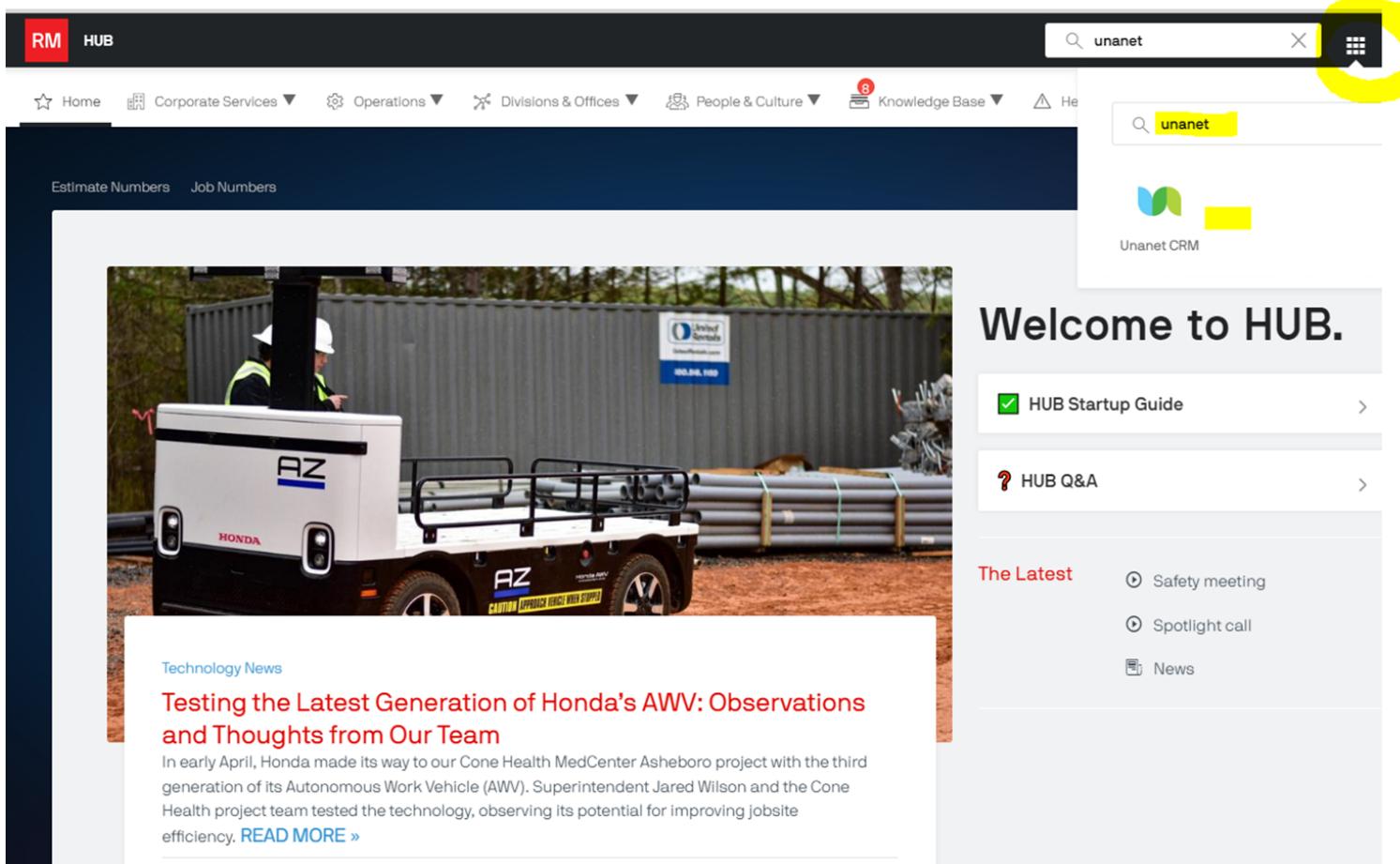
From the main page or marketing page you can select the Unanet link as highlighted in yellow in the screenshot below.

The screenshot shows the Robins & Morton HUB homepage. At the top, there's a navigation bar with links for Home, Corporate Services, Operations, Divisions & Offices, People & Culture, and a search bar. Below the navigation is a large image of people working in an office. A news banner at the bottom left reads "Learning and Development News" and "New Credit System Helps You Track Your Learning and Career Development". A yellow circle highlights the search bar, which contains the text "unanet". A second yellow circle highlights the magnifying glass icon next to the search bar. A third yellow circle highlights the "More Results" button. To the right of the search bar, there's a sidebar with sections for "Top Results 4 results", "Get Help with HUB", "Unanet CRM", "Unanet Support Request", "HUB Q&A", "The Latest", and "News".

Unanet Single Sign-On

Click on the waffle icon on the top right search Unanet and click on the Unanet logo.

Select  to access Single Sign-On Link.



The screenshot shows the Robins & Morton HUB homepage. At the top, there is a navigation bar with links for Home, Corporate Services, Operations, Divisions & Offices, People & Culture, Knowledge Base, and Help. A search bar contains the text "unanet". To the right of the search bar is a yellow-highlighted waffle icon. Below the navigation bar, there is a main content area featuring a photograph of a worker standing next to a white Honda Autonomous Work Vehicle (AWV) at a construction site. A news article titled "Testing the Latest Generation of Honda's AWV: Observations and Thoughts from Our Team" is displayed. On the right side of the page, there is a sidebar with the Unanet CRM logo and a "Welcome to HUB." message. The sidebar also includes links for "HUB Startup Guide" (with a checked checkbox), "HUB Q&A", and a section titled "The Latest" which lists "Safety meeting", "Spotlight call", and "News".

Step 1

After logging into Unanet, your screen will look like the screenshot below:

The screenshot shows the Unanet CRM interface for Robins & Morton. The top navigation bar includes the Unanet logo, a search bar, and various dashboard settings. The left sidebar lists navigation links such as Home, Activities, Companies, Contacts, Goals, Opportunities, Personnel, Projects, Publisher 4.0, Reports, Email, Email Marketing, Event Manager, Firm Org, Knowledge, and Project Manager. The main content area displays several dashboards:

- Open Sales Opportunities:** A grid showing Opportunity Name, City, and Department. Examples include Advanced Individual (Fort Rucker), Advent Health Waterford (Mount Dora), AdventHealth Winter Haven (Lakeland), AdventHealth Zephyrhills (Zephyrhills), Aerojet Rocketdyne (Huntsville), Anchor/LifePoint (South Miami), Atrium Cabarrus (Concord), Atrium Health - Deric (Greensboro), Auburn Graduate Hospital (Auburn), BHSF Neurosciences (Miami), Bank Independent (Muscle Shoals), Banyan Health Little Rock (Miami), Birmingham Human Resources (Birmingham), Broward Health North (Fort Lauderdale), CC Martin North (Stuart), and others.
- Opportunity Summary:** Metrics include Projects Awarded YTD (24), Hit Ratio by Count (43%), Hit Ratio by Volume (\$ 377,470,000 won : \$786,500,001 lost), Pipeline Size (632), and Opportunities created in the last 60 days (83).
- Sales Goal Gauge:** A circular gauge showing progress towards sales goals. The scale ranges from \$0 to \$1,404.25M. The current value is \$702.12M.
- Awarded Projects Snapshot (YTD):** Shows Projects Awarded (\$377,470,000), Hit Ratio, Hit Rate (32% by volume, 43% by count), Strategic Pursuit (Yes: 0%, No: 21%), and a breakdown of projects by stage.
- Opportunities by Stage:** A horizontal bar chart showing the number of opportunities at different stages: Won (3), Closed Won (68), Closed Lost (62), Inactive/Project On Hold (51), and Did Not Submit (49).

Step 2

Select the search bar at the top of the screen.

The screenshot shows the Unanet CRM interface. At the top, there is a navigation bar with the Unanet logo and a search bar containing the placeholder text "Search for a company, contact, opportunity, personnel, or project". Below the navigation bar is a dashboard titled "Company-Wide Sales Dashboard (shared by Katy Klaproth)". The dashboard features several sections: "Open Sales Opportunities" (a grid of opportunities), "Opportunity Summary" (with metrics like Projects Awarded YTD: 24 and Hit Ratio by Count: 43%), "Sales Goal Gauge" (a gauge chart showing progress towards sales goals), "Awarded Projects Snapshot (YTD)" (with metrics like Projects Awarded: \$377,470,000 and Hit Rate: 32%), "Opportunities by Stage" (a bar chart showing the number of opportunities in various stages like Won, Closed Won, Closed Lost, etc.), and "Win Rate" (a chart showing the win rate for different stages). On the left side, there is a sidebar with various menu items such as Home, Activities, Companies, Contacts, Goals, Opportunities, Personnel, Projects, Publisher 4.0, Reports, Email, Email Marketing, Event Manager, Firm Org, Knowledge, and Project Manager.

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Step 3

Click into the search bar and a drop-down box will appear.

The image shows the Unanet CRM interface. At the top, there is a search bar with the placeholder text "Search for a company, contact, opportunity, personnel, or project". Below the search bar is a "RECENTLY VIEWED" section containing five entries, each with a blue circular icon and a brief description. To the right of this section is a "FILTERS" panel with several filter options and a checkbox for "Remember my selections". At the bottom of the interface, there are several navigation links and a "Win Rate" chart.

RECENTLY VIEWED

- TFC Permian Basin Behavioral Health Center** Opp #: 22-0427
Client: Texas Facilities Commission • 07 - Won
Midland
- Auburn Graduate Hotel** Opp #: 19-0386
Client: AJ Capital Partners • 07 - Won
Auburn
- 106 Wynn Drive** Opp #: 22-0389
Client: Triangle Capital Group • 01 - Tracking
Huntsville
- Northwest Health - La Porte**
Project #: 1878 • Estimate Number: E3007
Other Project Name: Northwest Health - La Porte
Published Project Name: Northwest Health - La Porte
Client: Community Health Systems
La Porte IN United States
- Duke Health - Marshall Pickens Building Modification**
Opp #: 23-0141
Client: Duke Health - E&O • 07 - Won
Durham
- 330 South Tryon Office Building** Opp #: 19-0100
Client: Ferncroft Capital • 01 - Tracking

FILTERS

- Companies
- Contacts
- Opportunities
- Personnel
- Projects
- Remember my selections

ADVANCED SEARCH

Companies Contacts Opportunities Personnel Projects Knowledge Reports

Opportunity Pipeline

Win Rate

\$3,000M

Sales Goal Gauge

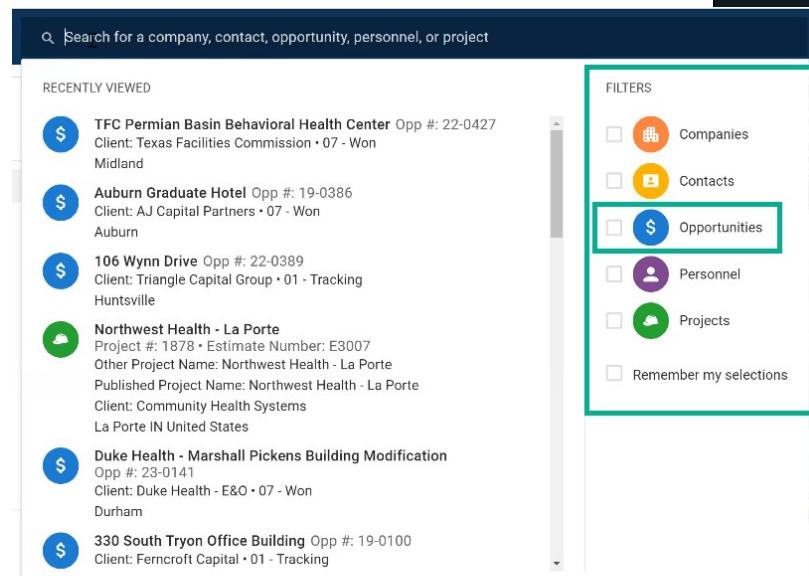
Dashboard Settings

Opportunities by Stage

Stage	Count
07 - Won	3
08 - Closed Won	68
09 - Closed Lost	62
10 - Inactive/Project On Hold	51
11 - Did Not Submit	58

Step 4

On the right side of the drop-down, select the Opportunities in the Filters.



Search for a company, contact, opportunity, personnel, or project

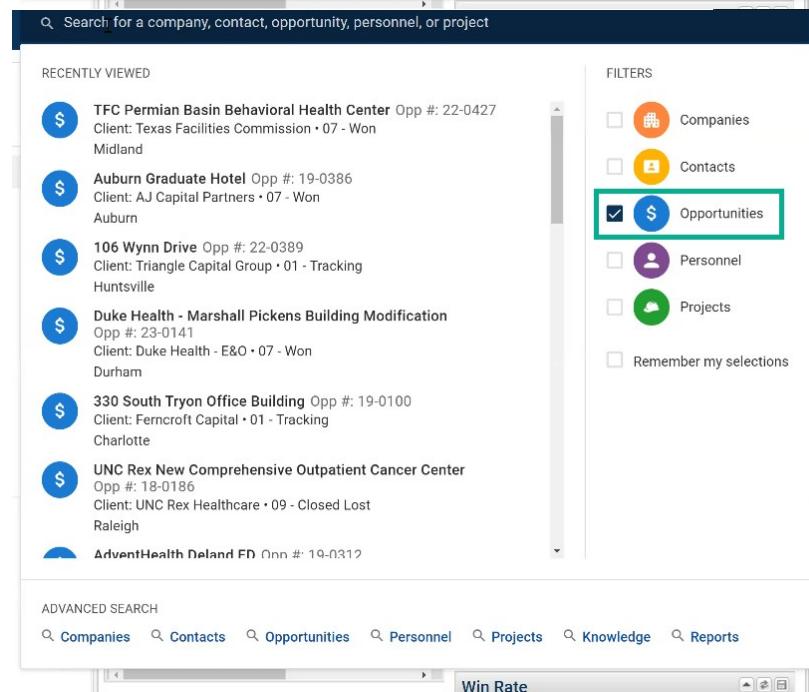
RECENTLY VIEWED

- TFC Permian Basin Behavioral Health Center Opp #: 22-0427
Client: Texas Facilities Commission • 07 - Won
Midland
- Auburn Graduate Hotel Opp #: 19-0386
Client: AJ Capital Partners • 07 - Won
Auburn
- 106 Wynn Drive Opp #: 22-0389
Client: Triangle Capital Group • 01 - Tracking
Huntsville
- Northwest Health - La Porte
Project #: 1878 • Estimate Number: E3007
Other Project Name: Northwest Health - La Porte
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Opp #: 23-0141
Client: Duke Health - E&O • 07 - Won
Durham
- 330 South Tryon Office Building Opp #: 19-0100
Client: Ferncroft Capital • 01 - Tracking

FILTERS

- Companies
- Contacts
- Opportunities
- Personnel
- Projects

Remember my selections



Search for a company, contact, opportunity, personnel, or project

RECENTLY VIEWED

- TFC Permian Basin Behavioral Health Center Opp #: 22-0427
Client: Texas Facilities Commission • 07 - Won
Midland
- Auburn Graduate Hotel Opp #: 19-0386
Client: AJ Capital Partners • 07 - Won
Auburn
- 106 Wynn Drive Opp #: 22-0389
Client: Triangle Capital Group • 01 - Tracking
Huntsville
- Duke Health - Marshall Pickens Building Modification
Opp #: 23-0141
Client: Duke Health - E&O • 07 - Won
Durham
- 330 South Tryon Office Building Opp #: 19-0100
Client: Ferncroft Capital • 01 - Tracking
Charlotte
- UNC Rex New Comprehensive Outpatient Cancer Center
Opp #: 18-0186
Client: UNC Rex Healthcare • 09 - Closed Lost
Raleigh
- AdventHealth Deland FD Opp #: 19-0312

FILTERS

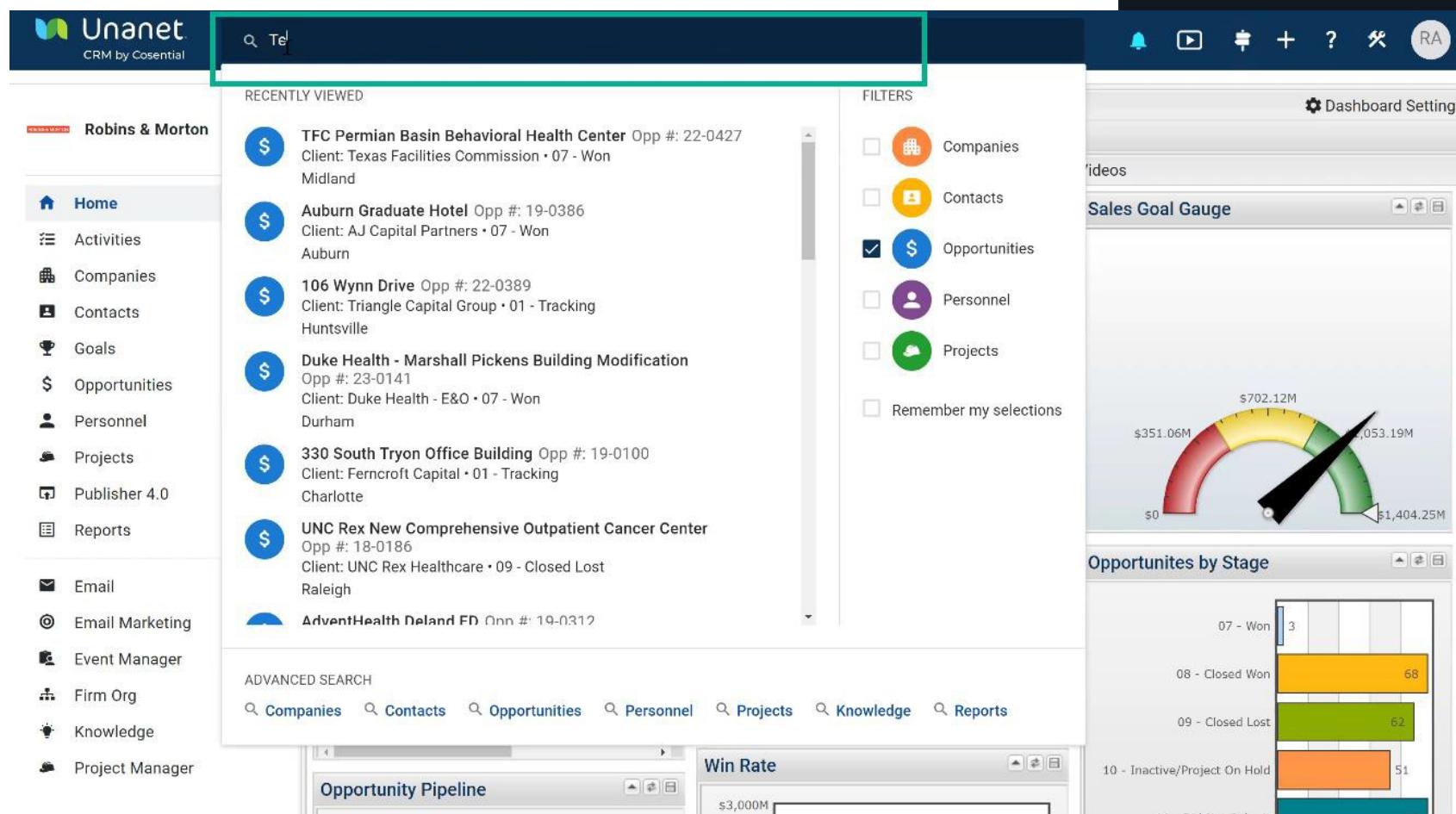
- Companies
- Contacts
- Opportunities
- Personnel
- Projects

Remember my selections

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Step 5

In the search bar, type the name of the opportunity. If you do not see your opportunity, contact Farrah Mote and your marketing manager.



The screenshot shows the Unanet CRM interface. A green box highlights the search bar at the top, which contains the text "Tel". Below the search bar is a list of recently viewed opportunities, each with a dollar sign icon and a brief description. To the right of the list is a "FILTERS" section with checkboxes for Companies, Contacts, Opportunities (which is checked), Personnel, and Projects. Below the filters is a "Remember my selections" checkbox. At the bottom of the main content area are advanced search filters for Companies, Contacts, Opportunities, Personnel, Projects, Knowledge, and Reports. The bottom navigation bar includes tabs for Opportunity Pipeline, Win Rate, and a value of \$3,000M. On the right side of the dashboard, there is a "Sales Goal Gauge" with a needle pointing between \$351.06M and \$702.12M, and a "Opportunities by Stage" chart showing counts for different stages: 07 - Won (3), 08 - Closed Won (68), 09 - Closed Lost (62), and 10 - Inactive/Project On Hold (51).

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Step 6

Select the opportunity.

Unanet CRM by Cosential

Robins & Morton

Home Activities Companies Contacts Goals Opportunities Personnel Projects Publisher 4.0 Reports Email Email Marketing Event Manager Firm Org Knowledge Project Manager

Test

MATCHES

- Testing CKC TEST :: Exclusion of Hospitality Sector Type Workflow Opp #: 21-0049 Client: Test 1 • 03 - Top Prospect Houston
- Adria Test Opp #: 23-0196 Client: Robins & Morton • 03 - Top Prospect Birmingham**
- CARBO - NIPP Alumina Grinding Test Design Opp #: 13-0365 Client: CARBO Ceramics Inc. • 08 - Closed Won New Iberia
- CKC Test - NOT REAL OPP Opp #: 22-0515 Client: Cearney Consulting • 01 - Tracking Makebelieve

FILTERS

- Companies
- Contacts
- Opportunities
- Personnel
- Projects
- Only show my records

Remember my selections

ADVANCED SEARCH

Companies Contacts Opportunities Personnel Projects Knowledge Reports

Broward Health No... Fort Lauderdale Mia
INFO: 21-0049 (5) : 7% (\$25,170,000)

CC Martin North C... Stuart Mia

Win Rate

Opportunity Pipeline

\$3,000M

Dashboard Settings

Sales Goal Gauge

\$702.12M
\$351.06M
\$0
\$1,404.25M

Opportunities by Stage

Stage	Count
07 - Won	3
08 - Closed Won	68
09 - Closed Lost	62
10 - Inactive/Project On Hold	51
11 - Did Not Submit	1

Step 7

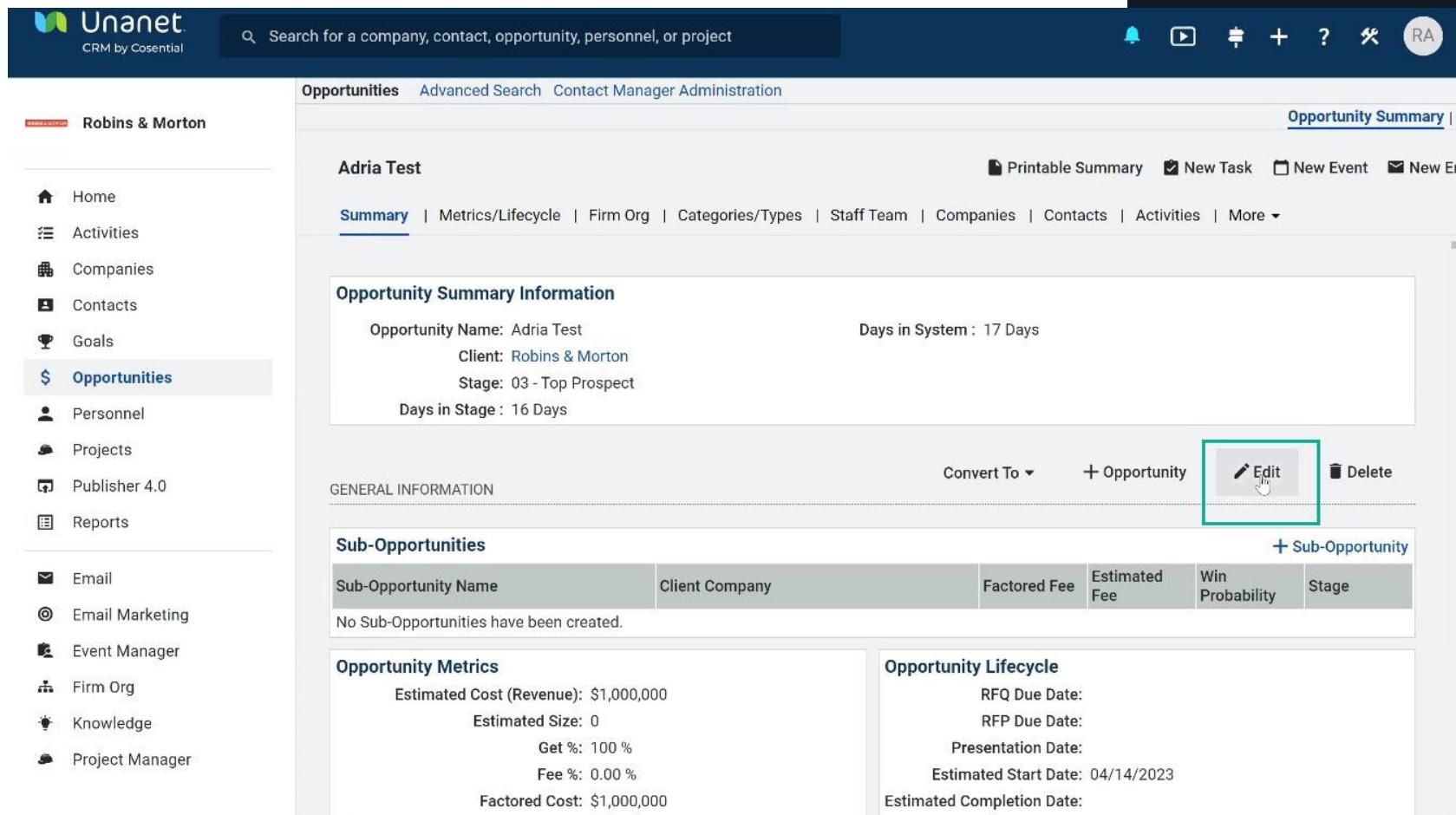
The opportunity record will open to the summary page.

The screenshot shows the Unanet CRM interface. The top navigation bar includes the Unanet logo, a search bar, and various administrative icons. The main header displays the current page as 'Opportunities' and the specific record as 'Adria Test'. On the left, a sidebar menu lists various modules: Home, Activities, Companies, Contacts, Goals, Opportunities (which is selected and highlighted in blue), Personnel, Projects, Publisher 4.0, Reports, Email, Email Marketing, Event Manager, Firm Org, Knowledge, and Project Manager. The main content area is titled 'Opportunity Summary Information' and contains details about the opportunity: Name (Adria Test), Client (Robins & Morton), Stage (03 - Top Prospect), Days in System (17 Days), and Days in Stage (16 Days). Below this, under 'GENERAL INFORMATION', are buttons for 'Convert To', '+ Opportunity', 'Edit', and 'Delete'. A section titled 'Sub-Opportunities' shows a table with columns for Sub-Opportunity Name, Client Company, Factored Fee, Estimated Fee, Win Probability, and Stage. A note states 'No Sub-Opportunities have been created.' At the bottom, two additional sections are visible: 'Opportunity Metrics' (with fields for Estimated Cost, Estimated Size, Get %, Fee %, and Factored Cost) and 'Opportunity Lifecycle' (with fields for RFQ Due Date, RFP Due Date, Presentation Date, Estimated Start Date, and Estimated Completion Date).

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Step 8

Select the “Edit” button to make updates to the fields.



The screenshot shows the Unanet CRM interface. The left sidebar is for 'Robins & Morton' with various menu items like Home, Activities, Companies, Contacts, Goals, Opportunities (selected), Personnel, Projects, Publisher 4.0, Reports, Email, Email Marketing, Event Manager, Firm Org, Knowledge, and Project Manager. The main content area is titled 'Opportunities' and shows 'Adria Test' as the current opportunity. The 'Opportunity Summary' tab is selected. The summary information includes the opportunity name 'Adria Test', client 'Robins & Morton', stage '03 - Top Prospect', days in system (17 days), and days in stage (16 days). Below this is a 'GENERAL INFORMATION' section with 'Convert To' and 'Opportunity' buttons, and an 'Edit' button highlighted with a green box. There's also a 'Delete' button. The 'Sub-Opportunities' section shows no sub-opportunities created. The 'Opportunity Metrics' section lists estimated cost (\$1,000,000), estimated size (0), get percentage (100%), fee percentage (0.00%), and factored cost (\$1,000,000). The 'Opportunity Lifecycle' section lists RFQ due date, RFP due date, presentation date, estimated start date (04/14/2023), and estimated completion date.

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Step 9

The opportunity will open to the editable view. Scroll to the fields that need to be populated.

The screenshot shows the Unanet CRM interface with a dark blue header. The header includes the Unanet logo, a search bar with placeholder text "Search for a company, contact, opportunity, personnel, or project", and several small icons. Below the header is a navigation sidebar on the left containing links such as Home, Activities, Companies, Contacts, Goals, Opportunities, Personnel, Projects, Publisher 4.0, and Reports. The main content area displays an opportunity record for "Adria Test". The record title is "Adria Test" with a dollar sign icon. On the left, there is a sidebar titled "General Info" with sections for Project Address, Metrics, Lifecycle, Categorization, Staff Team, and Notes. The main panel contains a "General Info" section with fields for Opportunity Name (Adria Test), Client Company (Robins & Morton), Opportunity Number (23-0196), Stage (03 - Top Prospect), Strategic Pursuit (Select), Decision Makers (empty field), Hot Buttons (empty field), Repeat Client (Yes), and Scope (empty field). A "Search fields" input field and a "Display all tooltips" checkbox are also present at the top of the main panel.

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Step 10

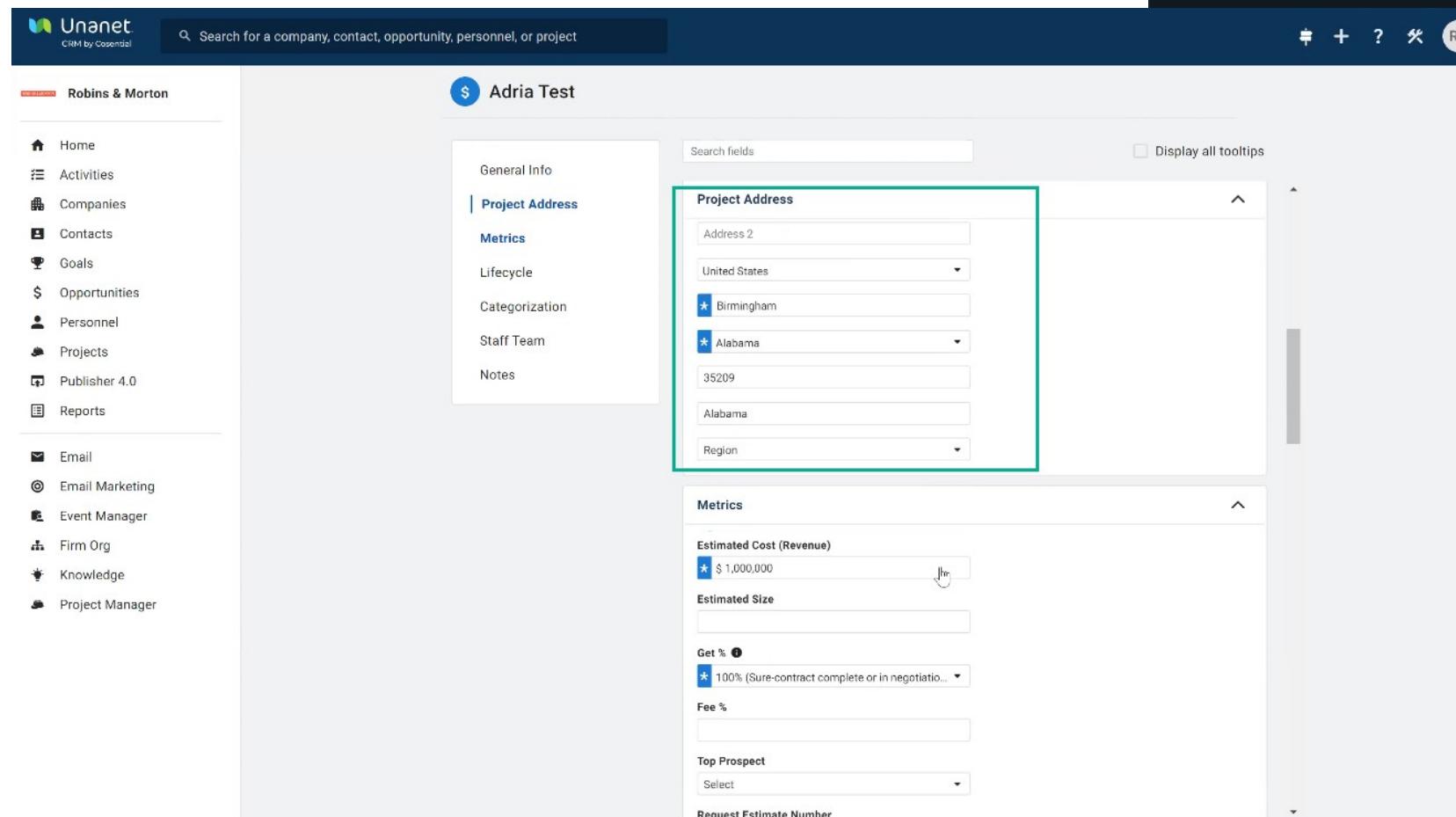
If the scope field is blank,
enter the relevant information.

The screenshot shows the Unanet CRM interface. On the left is a navigation sidebar with links like Home, Activities, Companies, Contacts, Goals, Opportunities, Personnel, Projects, Publisher 4.0, Reports, Email, Email Marketing, Event Manager, Firm Org, Knowledge, and Project Manager. The main area is titled 'Adria Test'. It contains sections for General Info (with fields for Company Name, Opportunity Number, Stage, and Strategic Pursuit), Metrics, Lifecycle, Categorization, Staff Team, Notes, Decision Makers, Hot Buttons, Repeat Client (set to Yes), and a large 'Scope' field which is currently empty and highlighted with a green border. Below the main form is a 'Project Address' section with radio button options for 'Same as Client Address' and 'Same as Owner Address'.

This screenshot shows the same CRM interface as the previous one, but the 'Scope' field has been populated with the text '36 bed ER room'. The rest of the form and sidebar are identical to the first screenshot.

Step 11

Scroll down to the Project Address section.
Make sure the city and state fields are
populated. If not, enter in the information.



The screenshot shows the Unanet CRM interface for a project named "Adria Test". The left sidebar contains navigation links for Home, Activities, Companies, Contacts, Goals, Opportunities, Personnel, Projects, Publisher 4.0, Reports, Email, Email Marketing, Event Manager, Firm Org, Knowledge, and Project Manager. The main content area displays the "General Info" tab, which includes sections for Project Address, Metrics, Lifecycle, Categorization, Staff Team, and Notes. The "Project Address" section is highlighted with a green box. It contains fields for Address 2, Country (United States), City (Birmingham, Alabama), Zip Code (35209), State (Alabama), and Region. Below this, the "Metrics" section is partially visible, showing fields for Estimated Cost (Revenue) (\$1,000,000), Estimated Size, Get % (100%), Fee %, Top Prospect (Select), and Request Estimate Number.

Step 12

Scroll down the page to the Metrics section for the Request Estimate Number field. Make note of this field, but do not fill out this field until you have finished entering all the other information.

Updating this field will be the last step you complete before saving and submitting your opportunity.

The screenshot shows the Unanet CRM interface for a project named "Adria Test". The left sidebar contains various navigation links such as Home, Activities, Companies, Contacts, Goals, Opportunities, Personnel, Projects, Publisher 4.0, Reports, Email, Email Marketing, Event Manager, Firm Org, Knowledge, and Project Manager. The main workspace has a dark header bar with the Unanet logo, a search bar, and some icons. Below the header, there are several tabs: General Info, Project Address (which is currently selected), Metrics, Lifecycle, Categorization, Staff Team, and Notes. The Metrics tab is expanded, showing fields for Estimated Cost (Revenue) (\$ 1,000,000), Estimated Size, Get % (100% - Sure-contract complete or in negotia...), Fee %, Top Prospect (Select), and Request Estimate Number (a dropdown menu with "Select" option highlighted by a teal box). The Lifecycle tab is also partially visible at the bottom.

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Step 13

Enter in your email information into the Estimate Number Requestor Email field.

The screenshot shows the Unanet CRM interface for a project named "Adria Test". The left sidebar contains navigation links for Home, Activities, Companies, Contacts, Goals, Opportunities, Personnel, Projects, Publisher 4.0, Reports, Email, Email Marketing, Event Manager, Firm Org, Knowledge, and Project Manager. The main content area displays project details under "Metrics" and "Lifecycle". A search bar at the top right says "Search for a company, contact, opportunity, personnel, or project". A tooltip "Display all tooltips" is visible. The "Estimate Number Requestor Email" field is highlighted with a green border. The field value is "fmote@robinsmorton.com".

This screenshot is identical to the one above, showing the Unanet CRM interface for the "Adria Test" project. The "Estimate Number Requestor Email" field is now populated with the value "fmote@robinsmorton.com". The rest of the interface, including the sidebar, metrics, lifecycle, and search bar, remains the same.

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Step 14

Scroll down to the Categorization section. Select the Project Information field to add additional fields. Select the Add button to open the product information options window.

The screenshot shows the Unanet software interface for 'Adria Test'. On the left is a navigation sidebar with various modules like Home, Activities, Companies, Contacts, Goals, Opportunities, Personnel, Projects, Publisher 4.0, Reports, Email, Email Marketing, Event Manager, Firm Org, Knowledge, and Project Manager. The main area is titled 'Adria Test' and contains sections for General Info, Lifecycle, and Categorization. The Categorization section is expanded, showing fields for Offices (Birmingham), Departments (Central), Project Information (Green Practices or...), Building Forward Resource (Team Culture), Primary Categories (Commercial), and Secondary Categories. A green box highlights the 'Add' button next to the Project Information field.

This screenshot is similar to the one above, showing the Unanet software interface for 'Adria Test'. The navigation sidebar and main sections are identical. The Categorization section is also expanded, but the 'Add' button next to the Project Information field is now highlighted with a green box, indicating it has been selected.

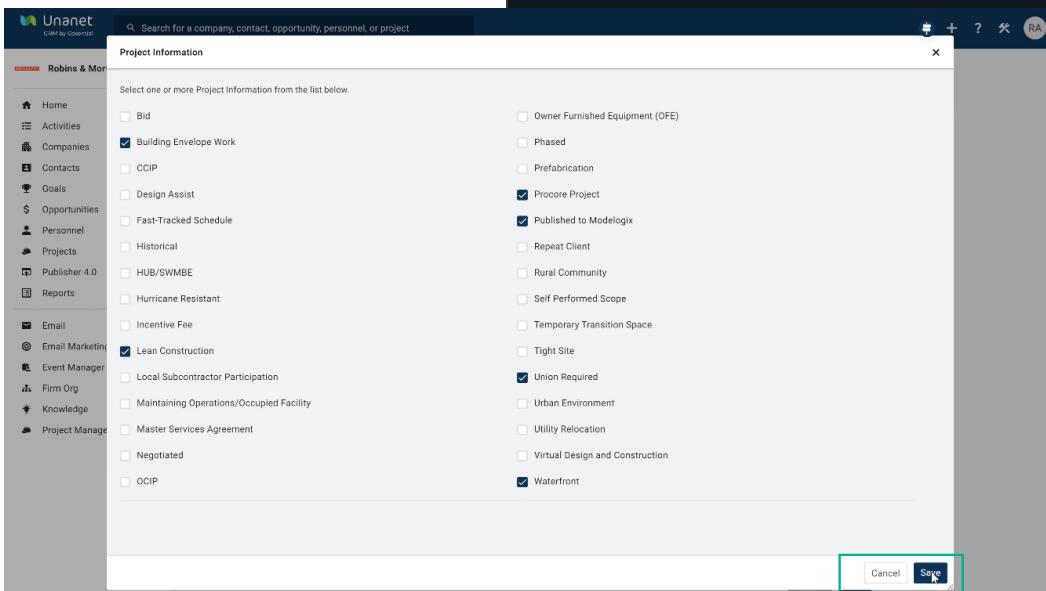
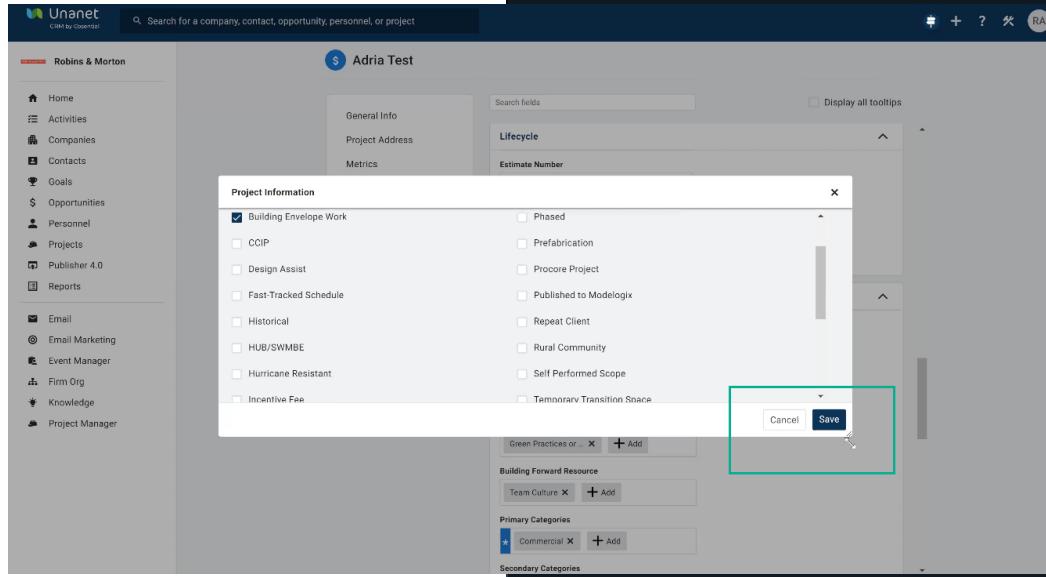
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Step 15

The product information window will open with the available options for the project information.

Select the checkboxes next to the information that is applicable to the project.

You can resize the box by going to the lower right corner with the cursor and dragging the window to your preferred size. When you have finished selecting all the applicable information, click the save button in the window. It will return you to the editable view.



Step 16

Scroll down the page to the client type field in the Categorization section.

The screenshot shows the Unanet CRM software interface. On the left is a sidebar with various menu items like Home, Activities, Companies, Contacts, Goals, Opportunities, Personnel, Projects, Publisher 4.0, Reports, Email, Email Marketing, Event Manager, Firm Org, Knowledge, and Project Manager. The main area displays a record for 'Adria Test'. The 'Categorization' section is expanded, showing fields for Services (Robins & Morton G...), Construction Types (Greenfield), Delivery Methods, Contract Type, and Client Types. The 'Client Types' field is highlighted with a green rectangular border. Below the categorization section is the 'Staff Team' section, which lists Adria Klein as a Marketing Contact. At the bottom are 'Cancel' and 'Save' buttons.

Step 17

Select the Add button to add the Client Type.

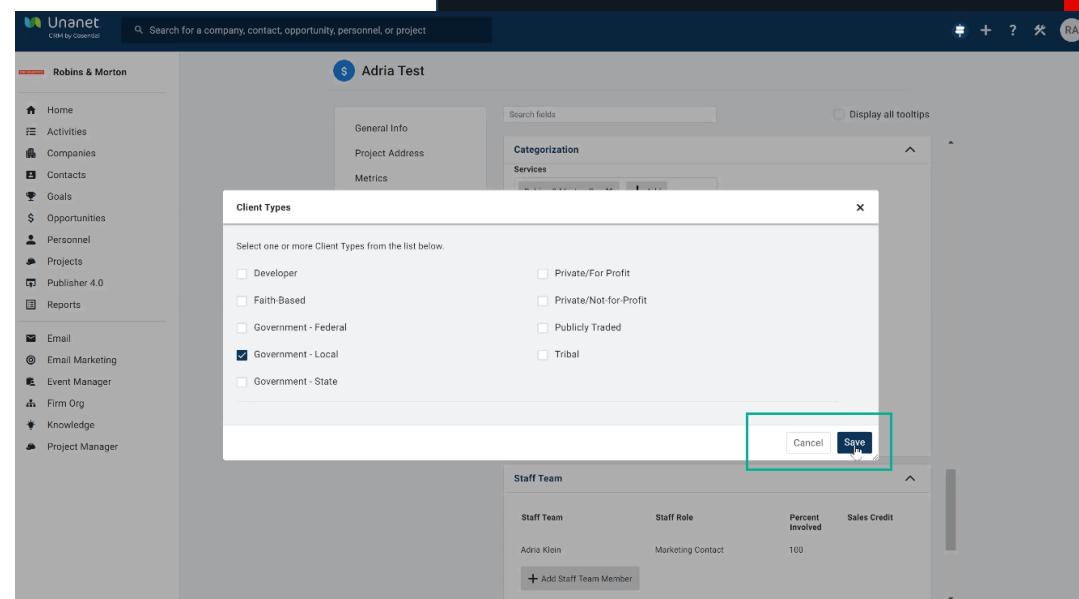
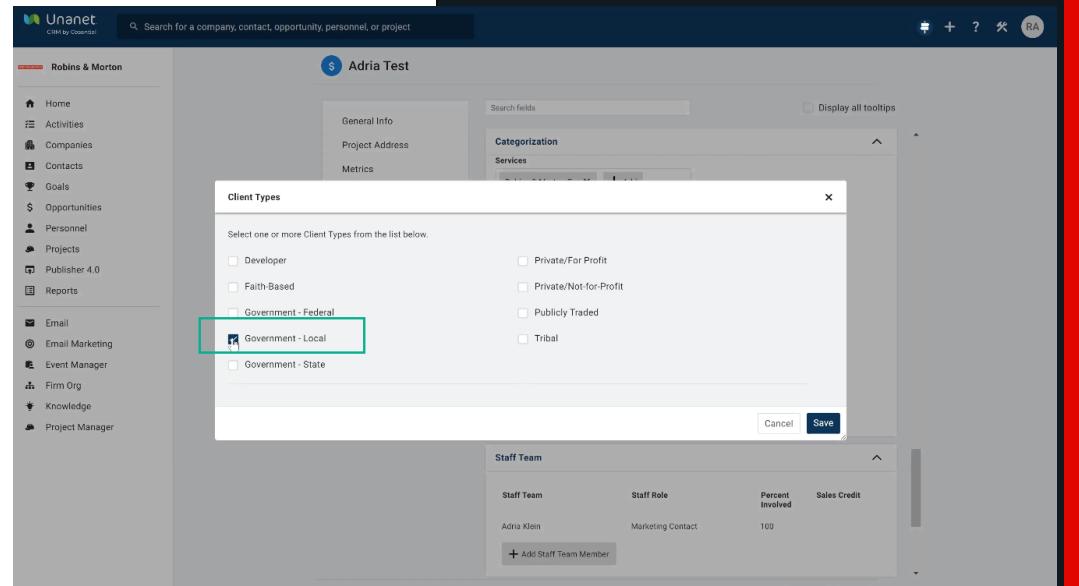
A window will open with the client type options.

The screenshot shows the Unanet CRM interface for a contact named "Adria Test". The left sidebar contains navigation links for Home, Activities, Companies, Contacts, Goals, Opportunities, Personnel, Projects, Publisher 4.0, Reports, Email, Email Marketing, Event Manager, Firm Org, Knowledge, and Project Manager. The main content area displays the contact's details under the "General Info" tab. A "Categorization" section is visible, containing fields for Services, Construction Types, Delivery Methods, Contract Type, and Client Types. The "Client Types" field is highlighted with a green border. Below the categorization section, there is a "Staff Team" table with one entry: "Adria Klein" in the Staff Team column, "Marketing Contact" in the Staff Role column, "100" in the Percent Involved column, and "Sales Credit" in the Sales Credit column. At the bottom right of the main content area are "Cancel" and "Save" buttons.

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Step 17 Continued

Select the checkbox of the Client Type that applies and click save in the window. The screen will return to the editable view. Select Save.



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Step 18

Scroll down the page to the Staff Team section. There must be a person assigned to the following positions: **Lead Estimator, Operations Manager, and Project Manager.** If there are not people already with these positions assigned to the opportunity, select the “Add Staff Team Member” button to open a window to add members to Staff Team section.

The image displays two side-by-side screenshots of the Unanet software interface, specifically the 'Opportunities' module for the 'Robins & Morton' firm. Both screenshots show the same opportunity record for 'Adria Test'.

Screenshot 1 (Top): This screenshot shows the 'Staff Team' section with one member listed:

Staff Team	Staff Role	Percent Involved	Sales Credit
Adria Klein	Marketing Contact	100	

A green rectangular box highlights the '+ Add Staff Team Member' button located at the bottom left of the staff team table.

Screenshot 2 (Bottom): This screenshot shows the same opportunity record with the '+ Add Staff Team Member' button also highlighted by a green box, indicating it has been clicked or is the focus of the step.

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Step 19

Enter in the personnel name to add the person to the Staff Team. Start typing the person's name and then click in the drop-down when their name appears.

Select their Staff Role from the list. Select the Add button to add the person. Repeat the steps to add more members. There must be a person assigned to the Lead Estimator, Operations Manager, and Project Manager for the Staff Team section.

The screenshot shows the Unanet software interface for adding personnel to a staff team. In the 'Staff Team' section, there is a table with one row for 'Adria Klein' and another row for 'Eric Great'. The 'Staff Role' column for Eric Great has a dropdown menu open, showing various options like 'On-Site Supervisor', 'Operations Manager', and 'Operations Assistant'. The 'Operations Manager' option is highlighted with a red box. At the bottom of the table, there are 'Add' and 'Cancel' buttons, with the 'Add' button also highlighted with a red box.

This screenshot continues the process shown above. The 'Operations Manager' option in the dropdown menu is now selected and highlighted with a red box. The dropdown menu itself is also outlined with a red box. The rest of the interface remains the same, with the 'Add' and 'Cancel' buttons at the bottom of the table.

The final screenshot shows the completed addition of Eric Great to the staff team. The 'Operations Manager' role is now listed in the 'Staff Role' column for Eric Great. The 'Add' and 'Cancel' buttons are visible at the bottom of the table, with the 'Add' button highlighted with a red box.

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Step 20

Scroll up on the page to return to the Metrics section. Once you have finished entering the information for the sections, select the Request Estimate Number field and select Yes.

The screenshots show the Unanet CRM software interface. The top screenshot displays the 'Metrics' section with the 'Request Estimate Number' dropdown highlighted and the value 'Yes' selected. The bottom screenshot shows the same section with the 'Request Estimate Number' dropdown highlighted and the value 'Select one' selected. Both screenshots include a sidebar with navigation links such as Home, Activities, Companies, Contacts, Goals, Opportunities, Personnel, Projects, Publisher 4.0, Reports, Email, Email Marketing, Event Manager, Firm Org, Knowledge, and Project Manager.

Step 21

Make sure the requestor email field is completed because it will notify you once it has been put into HUB and the estimate number list.

The screenshot shows the Unanet CRM interface. On the left is a navigation sidebar with various modules: Home, Activities, Companies, Contacts, Goals, Opportunities, Personnel, Projects, Publisher 4.0, Reports, Email, Email Marketing, Event Manager, Firm Org, Knowledge, and Project Manager. The main area displays a project record for "Adria Test". The "General Info" section includes fields for Project Address, Metrics (Estimated Cost (Revenue) set to \$ 1,000,000), Lifecycle, Categorization, Staff Team, and Notes. A dropdown menu for Request Estimate Number is set to "Yes". The "Estimate Number Requester Email" field contains "fmote@robinsmorton.com" and is highlighted with a green border. The "Lifecycle" section includes fields for RFQ Due Date and RFP Due Date, both set to "MM/DD/YYYY". The top navigation bar includes a search bar, a "Display all tooltips" checkbox, and user icons for RA and RA.

Step 22

Once you have entered the information and selected yes for the request estimate number field and would like to finish, select save at the bottom right of the page.

The screenshot shows the Unanet CRM interface for a project named "Adria Test". The left sidebar shows the navigation menu for Robins & Morton, including Home, Activities, Companies, Contacts, Goals, Opportunities, Personnel, Projects, Publisher 4.0, Reports, Email, Email Marketing, Event Manager, Firm Org, Knowledge, and Project Manager. The main content area displays the project details. On the left, a sidebar lists General Info, Project Address, Metrics, Lifecycle, Categorization, Staff Team (which is currently selected), and Notes. The Staff Team section contains a table with four rows:

Staff Team	Staff Role	Percent Involved	Sales Credit
Matt Self	Project Manager		
Adria Klein	Marketing Contact	100	
Eric Groat	Operations Manager		
Adam Scott	Lead Estimator		

A "Add Staff Team Member" button is located below the table. To the right of the Staff Team section is a Notes section with a rich text editor toolbar and a "Add Notes" input field. At the bottom right of the notes section is a "Save" button, which is highlighted with a green box.

Step 23

Once you have saved, the screen will return to the opportunity summary page. The automated process will begin and will place the information here into the estimate number request list in HUB.

The screenshot shows the Unanet CRM interface. The top navigation bar includes the Unanet logo, a search bar, and various icons for notifications, tasks, events, and help. The main title is "Opportunities" with links to "Advanced Search" and "Contact Manager Administration". The current view is the "Opportunity Summary" for an opportunity named "Adria Test".

Opportunity Summary Information:

- Opportunity Name: Adria Test
- Days in System : 17 Days
- Client: Robins & Morton
- Stage: 03 - Top Prospect
- Days in Stage : 16 Days

GENERAL INFORMATION: Convert To ▾, + Opportunity, Edit, Delete

Sub-Opportunities: + Sub-Opportunity

Sub-Opportunity Name	Client Company	Factored Fee	Estimated Fee	Win Probability	Stage
No Sub-Opportunities have been created.					

Opportunity Metrics:

- Estimated Cost (Revenue): \$1,000,000
- Estimated Size: 0
- Get %: 100 %
- Fee %: 0.00 %
- Factored Cost: \$1,000,000

Opportunity Lifecycle:

- RFQ Due Date:
- RFP Due Date:
- Presentation Date:
- Estimated Start Date: 04/14/2023
- Estimated Completion Date:

Step 23

You will be notified with an email once the process has been completed.

Your request for an estimate number has been generated in the Estimate Request List in SharePoint for the following opportunity:

Opportunity Number: 23-0313

Opportunity Name: Nemours Jacksonville 9th Floor Buildout

Here are the Estimate Number Details:

Estimate Number: E4329

Job Name: Nemours Jacksonville 9th Floor Buildout

Operations Manager: Mark Fernung

Lead Estimator: Lisa McKnight

Location: Jacksonville, FL

Scope: Demolition and Buildout of 9th Floor

Owner's Name: Nemours Children's Hospital

Green Practices and/or LEED Project: No

Procore Project: No

Building Envelope Work: No