

THE PRODUCTION ESTIMATE

A Production Estimate enables you to compile an accurate project price. The more detailed its Work Codes and Sub-items, the less likely you are to overlook “the little things” like color outputs and parking.

CurrentTrack®
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Clients & Jobs > Mission East Health Care > Capabilities Brochure (MEHC-12702) > Create Production Estimate

Subject: [Blank]
Budget \$6300.00

Account Service (Code: AS) (Rate: \$125.00/hr.)

Item	Qty.	Outsourced	Hours/Cost	Net Cost	Tax	Markup	Markup Rate	Subtotal	Comments
Account Coordinator Time								0.00	
Account Executive Time								0.00	
Food		☒			☐	☐		0.00	
Lodging		☒			☐	☐		0.00	
Mileage		☒			☐	☐		0.00	
Misc. Expenses		☒			☐	☐		0.00	
Parking		☒			☐	☐		0.00	
PR Coordination								0.00	
PR Planning								0.00	
PR Supervision								0.00	
Travel Time								0.00	

Administration (Code: A) (Rate: \$75.00/hr.)

Item	Qty.	Outsourced	Hours/Cost	Net Cost	Tax	Markup	Markup Rate	Subtotal	Comments
Catering		☒			☐	☐		0.00	
Delivery Charges		☒			☐	☐		0.00	
Entertainment		☒			☐	☐		0.00	
Legal Services		☒			☐	☐		0.00	

ADDING LINE ITEMS

First, add a Work Code by going to: *Administration — System Administration — Manage Work Codes — I Want To: Add a Work Code*

Enter the Code (e.g. AS or C); assign it a Name (e.g. Account Service) and Rate (e.g. 150.00). Check the box beside Use in Production Estimate and click Add Work Code.

Next, create Sub-Items for each of the Work Codes you've added. Think of the Codes as "headers" and their Sub-Item(s) as the fields you'll fill in (e.g. 3 Hours @ 100.00).

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Item	Qty.	Outsourced	Hours/Cost	Net Cost	Tax	Markup	Markup Rate	Subtotal	Comments
Account Coordinator Time								0.00	
Account Executive Time								0.00	
Food		☒			☐	☐		0.00	
Lodging		☒			☐	☐		0.00	
Mileage		☒			☐	☐		0.00	
Misc. Expenses		☒			☐	☐		0.00	
Parking		☒			☐	☐		0.00	
PR Coordination								0.00	
PR Planning								0.00	
PR Supervision								0.00	
Travel Time								0.00	

Administration (Code: A) (Rate: \$75.00/hr.)

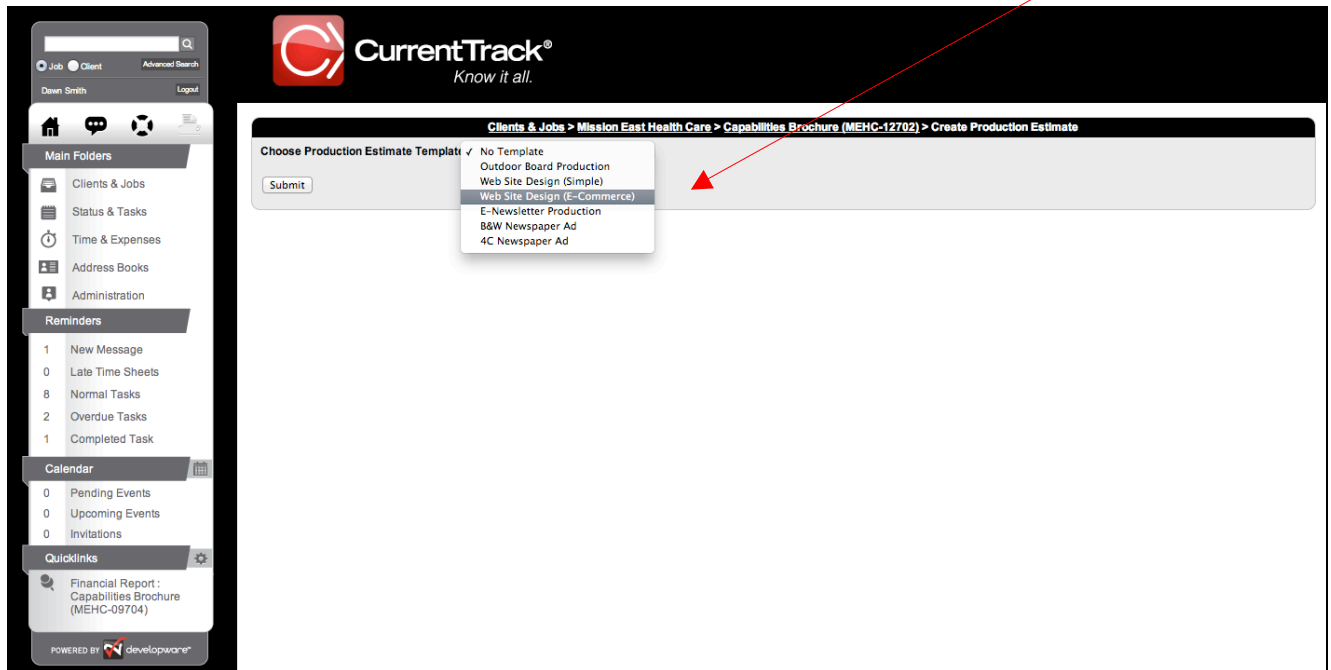
Item	Qty.	Outsourced	Hours/Cost	Net Cost	Tax	Markup	Markup Rate	Subtotal	Comments
Catering		☒			☐	☐		0.00	
Delivery Charges		☒			☐	☐		0.00	
Entertainment		☒			☐	☐		0.00	
Legal Services		☒			☐	☐		0.00	

To create a Sub-Item, go to: *Administration — System Administration — Manage Work Codes — I Want To: Add a Work Code Sub-Item*

Assign a Name (e.g. Account Executive Time) and determine which variables relate to the Sub-Item. Does it require a quantity (e.g. Color Outputs)? Can it be Outsourced (e.g. Parking)? Taxed or Marked Up? What is the Sub-Item's parent Work Code? Proofreading, for example, might belong under Administration; Art Direction under Creative. Click Create Work Code Item.

ESTIMATE TEMPLATES

Now that your default Production Estimate is in place, save variations of it for different types of projects (e.g. B&W Newspaper Ad, 4C Newspaper Ad, etc.).



To create a Template, go to: *Administration – System Administration – Manage Production Estimate Templates*

Select Create New Template from the drop-down menu and click Submit. Fill in all applicable fields and click Save Template. The new Template will now appear in the *I Want To:* drop-down menu of all jobs.

INCLUDING PRINTING COSTS

The Print Estimate feeds into the larger Production Estimate, and is an optional way to help calculate production costs. To create a Print Estimate, go to:

Clients & Jobs — Client — Job — I Want To: Create Print Estimate

You'll be led through a series of questions in order to build the most accurate form. Remember to enter a Vendor for each Item as well as a Description (e.g. 8-1/2 x 11, 4C) and Lot number. The Lot number is the number of "groups" you'll be estimating (e.g. quantities of 1000, 2500 and 5000 = (3) Lots).

Once the Account Manager (or Client) has conveyed which option is preferred, Edit the Print Estimate and select the circle beside the chosen line item(s); click Submit.

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Clients & Jobs > Mission East Health Care > Capabilities Brochure (MEHC-12702) > Documents Folder > Edit Print Estimate

Subject: Printing of revised brochure

Item 1: Brochure Vendor: Bandy Graphix Vendor Tax: 0.06000 Client Markup: 1.87000
Description: 8-1/2 x 11 flat trifold 4/4 bleeds 80# gloss text

	Quantities	Vendor Quote	Per Unit Approx.	Markup	Tax	Our Quote
☐	Qty: 1000	1000.00	1.00	☒	☐ Net ☐ Gross	1870.00
☐	Qty: 2500	1980.00	0.79	☒	☐ Net ☐ Gross	3702.60

Item 2: Brochure Vendor: Miller Rainbow Printing Vendor Tax: 0.06000 Client Markup: 1.87000
Description: 8-1/2 x 11 flat trifold 4/4 bleeds 80# gloss text

	Quantities	Vendor Quote	Per Unit Approx.	Markup	Tax	Our Quote
☒	Qty: 1000	965.00	0.97	☒	☐ Net ☐ Gross	1804.55
☐	Qty: 2500	1450.00	0.58	☒	☐ Net ☐ Gross	2711.50

Item 3: Brochure Vendor: We Print Vendor Tax: 0.06000 Client Markup: 1.87000
Description: 8-1/2 x 11 flat trifold 4/4 bleeds 80# gloss text

The figure(s) will automatically be pulled into the job's Production Estimate.

Administration Sub-Total: \$1005.50

Administration Item	Qty.	Outsourced	Hours/Cost	Net Cost	Tax	Markup	Subtotal	Comments
Printing Estimation			1.00	\$75.00			75.00	
Proofreading			5.00	\$375.00			375.00	
Telephone Charges		x	\$150.00	\$150.00			150.00	
Administration Sub-Total:							\$600.00	

Creative Item	Qty.	Outsourced	Hours/Cost	Net Cost	Tax	Markup	Subtotal	Comments
Art Direction			9.00	\$900.00			900.00	
B/W Lasers	150	x	\$0.20	\$30.00	x	x	10.00	
Color Outputs	25	x	\$0.15	\$3.75	x	x	3.75	
Concept Development			1.50	\$150.00			150.00	
Copywriting			5.00	\$500.00			0.00	
Creative Direction			2.00	\$200.00			200.00	
Misc. Art Expenses		x	\$50.00	\$50.00	x	x	0.00	
Stock Photos		x	\$300.00	\$300.00	x	x	0.00	
Type Formatting			5.00	\$500.00			500.00	
Creative Sub-Total:							\$1763.75	

Print Estimates		
Print Estimate (2002-08-12)		\$1804.55
Print Estimate Sub-Total		\$1804.55
Grand Total:		\$5173.80

Comments:

cc: Benjamin, Dawn, Jonathan, Julianne, Pamela, Suzanne

Disclaimer
Thank you for the opportunity to estimate your needs. The above estimate does not constitute the final cost of Job production. Only after further review of specifications and all pertinent information will the above price be considered final.

