SOP Reference #: SOP-EST001

Operation/Task:	Generating Estimates			Equipment:	N/A
Owner:	Estimating Manager	Date Prepared:	4/1/15	Department Responsibilities:	This procedure applies to all customer enquiries that require a system generated estimate
		Revision History:	See last page		

ALERTS (see below):   Critical Step ◆   Quality Check ☑   Tip ☺   Team Safety ✚

Purpose: This SOP/work instruction documents procedures for generating estimates.

Step #	Alerts	Step Description - "What to Do"	"How to Do it"	"Why to Do it"
1	◆ ◆	**Preparing for an estimate** • A request for estimate form is required to be filled out by Sales or Client Services. **Form:** EST003, EST009, MAIL048-EST009 combined These forms consist of the specifications necessary for an estimator to accurately prepare an estimate. • Review specifications on the form to ensure all information has been captured and clearly identified before starting the estimate. If form is missing information return to source for more details. • The estimator will produce an estimate based on the given information in the most cost effective and efficient way ENPOINTE can produce the product.	• Estimator may have to create multiple estimates.	• To ensure the best price and most effective plan is estimated.

| 2 | ☑ | **Print Estimate**
• Estimate will be created using the ENPOINTE MIS system.
• Determine the press and layout for all print components.
• Enter the premedia functions and proofing requirements.
• Determine the Press to be used.
• Determine all necessary bindery functions.
• Select a paper source and request pricing from merchant or refer to merchant pricelist.
• Determine if any outside services are required and request pricing from vendor.
• Printout estimate and review for accuracy before giving to sales. Estimates over $25,000 must be reviewed by another estimator for accuracy.
• Send Sales a Letter of Quote and give estimate to Sales. | • Estimates over $25,000 must be reviewed by another estimator for accuracy.
• Estimates to be reviewed to check paper pricing, number of runs, outside services estimating, finishing and Premedia specifications per spec sheets provided by manufacturing. | • To catch any errors before estimate is given to Sales. |
| 3 | ☑ | **Lettershop Estimate**
• Estimate will be created using the ENPOINTE MIS system.
• Determine any Data Processing functions.
• Determine Lettershop functions.
• Printout estimate and review for accuracy before giving to sales. Estimates over $25,000 must be reviewed by another estimator for accuracy.
• Send Sales a Letter of Quote and give estimate to Sales. | • Estimates to be reviewed to check paper pricing, number of runs, outside services estimating, finishing and Premedia specifications per spec sheets provided by manufacturing. | • To catch any errors before estimate is given to Sales. |

Notes:

Definitions:

Revision History	Description of Changes	Requested by	Date
Rev 1	Revised SOP to new format	Kent Doncavage	4/1/15
Rev 2	Added Revision History table	Kent Doncavage	8/1/16
Rev 3	Changed $ amount in Step 2 and Step 3	Kent Doncavage	4/26/17
Rev 4	Changed owner name. Added bullet points to How to Do it steps 2 and 3.	Brian Norman	11/11/19
Rev 5	Changed verbiage in Step 3 How to Do it	Brian Norman	12/03/19
Rev 6	Updated owner to title, updated gray headers, changed form numbers in Step 1 What to Do, changed references of GLS to ENPOINTE.	Brian Norman	2/25/21

CI035   Rev. Date 4/20